SFA User Manual

MDSR Persona- Version 7.4.0

Revised on 7th May 2024

Contents

About Us

Botree Software Int. Pvt Ltd. is the market leader in **next-gen Route to Market solutions** that delivers a multichannel, frictionless, and intelligent customer experience.

1. Introduction

The "**Botree Sales Force Automation (BSFA)"** software is built to fit in the sales and distribution management system. Must be fit seamlessly into the processes, be infinitely expandable and be flexibly adaptable to future business requirements. The BSFA plays the crucial role to achieve the high performance in today's and future logistics.

1.1 Application Overview

The BSFA is leading sales force software - designed to manage and control your sales, order billing and stock distribution right through the application.

This application is integrated with ERP software that allows to manage all aspect of supply chain business on single platform which includes sales statistics, stock, billing and distribution.

The application has some of the below highlighted key features:

- Easy to configure (for ex: Distributors, Sales Executive and Delivery Executive)
- Improve sales productivity
- Order tracking
- Real time sales analytics
- Daily sales report

1.2 About This Guide

This User Manual (UM) provides information about the services and necessary functions available in the BSFA mobile application for sales persons and delivery persons to access them effectively.

2. System Summary

System summary section explains about the hardware and software requirements for accessing the BSFA application and user level access.

2.1 Hardware and Software Requirements

The BSFA application is compatible with most Android tablets and mobiles. Make sure your device must have minimum of the below features:

Mobile Requirements	Minimum Configuration	Recommended Configuration
Memory	*4 GB*	*4 GB*
Internal Storage	*32 GB*	*32 GB and above*
Android OS	*Android 10*	*Android 10 and above*
Display size	*5 Inches*	*5.2 Inches and above*
Connectivity	*3G/4G/VoLTE*	*5.2 Inches and above*

2.2 User Access Level

There are three types of users in BSFA application.

- Distributors
- Sales Executive
- Delivery Executive.

2.2.1 Distributors

User can track the daily sales report of sales and delivery executive. They can also check the individual productivity.

2.2.2 Sales Executive

User can access and use the BSFA application for order booking, adding new retailer, manage the billed and unbilled transaction, etc.

2.2.3 Delivery Executive

User can access the list of orders, product stock loading and complete the delivery process.

3. How to Install the BSFA Application

Do follow the below steps to install the BSFA application on your mobile:

- Open “Play Store” application on your mobile.
- Click “Search bar” and enter the text “BSFA”.
- Click BSFA application icon.
- Click “INSTALL” button.

3.1 Required Condition

Make sure you have the good internet connection for tracking, order booking, delivery the products.

Make sure your device meets the hardware and software requirements.

3.2 Accessing the System

The company will provide the user ID and password to every BSFA user. You cannot reset the password provided by the company. If you are getting any login issue, you must contact the support team to get the issue fixed.

4. Software Operation

BSFA is the solution to manage and supervise centralized Sales, Support Control System, Distribution, Sales and market effectively. BSFA software can be installed on mobile devices running on the Android operating system. BSFA software provides the following utilities to salesman.

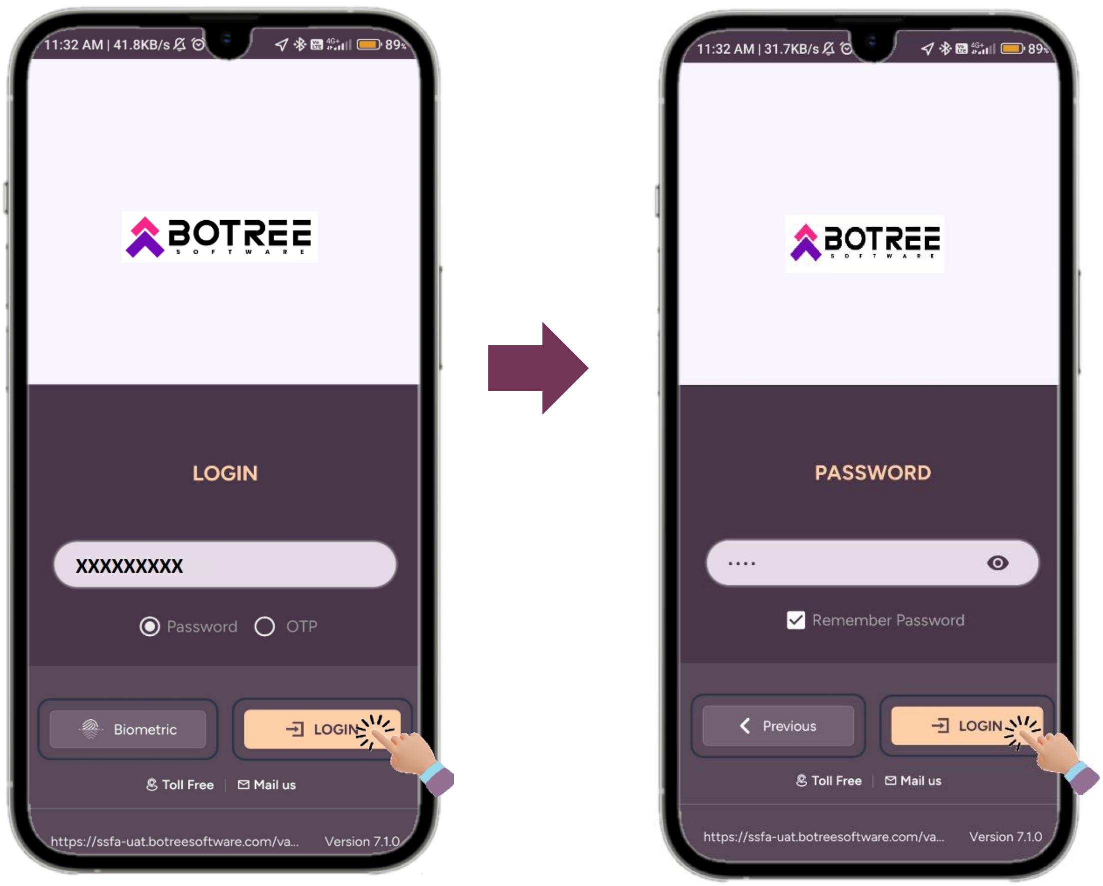
- Proactively monitor and manage the progress of work
- Visit and support the implementation of Route Customer Care in the Date
- Place Order quickly and accurately
- New Customer Development Potential

The following sub-sections provides the step-by-step instructions on how to use the various functions and features of the BSFA.

4.1 Login

Click on the “ ” icon to open the application. You can access the application either by entering Password or OTP verification.

Enter the **login ID** >> **Password** >> Click “**Login**”.

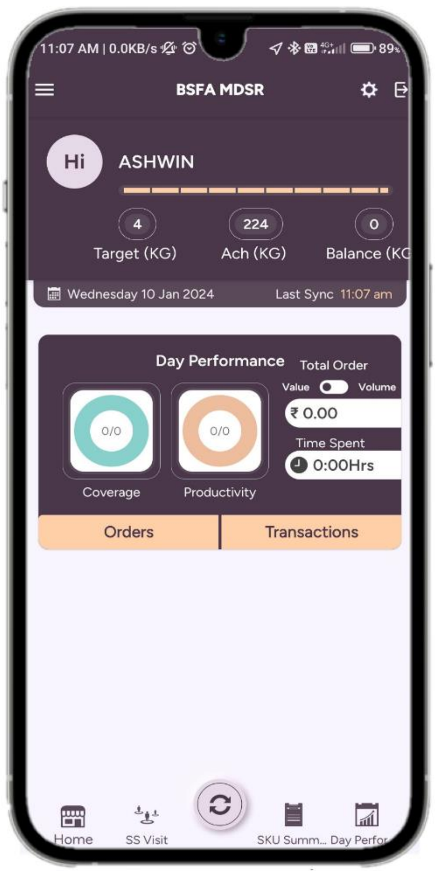


Note: If there is any technical glitch or service unavailable errors, you can contact the support team by using the toll free or mail us option.

4.2. Features & Functionalities

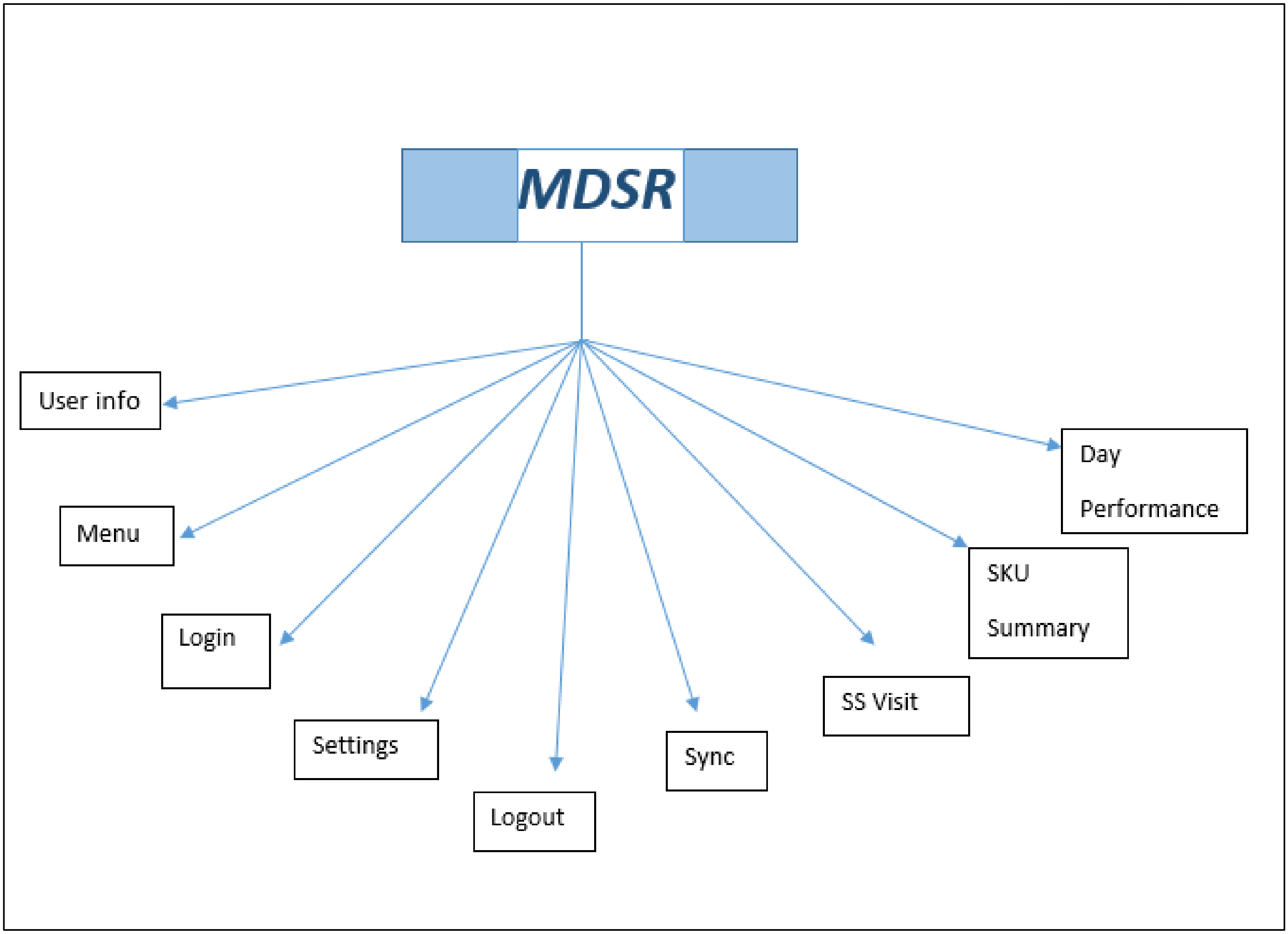
This chapter describes the common features and functions available in the BSFA application. The main page displays the below listed features.

1. Home
2. Notification
3. Sync
4. Settings
5. Search



4.2.1. Home screen

In the MDSR home screen, the below listed modules can be seen. Please refer to the illustration for more information.

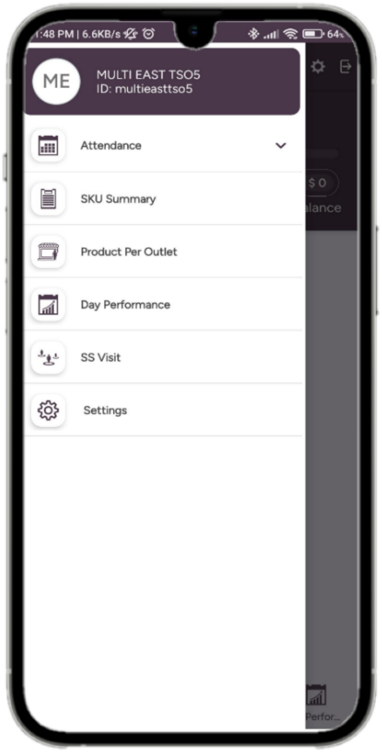


1. USER INFO & DAILY TARGET

In the user info, the name of the retailer, target, achievement and the pending balance of that specific retailer is shown.

2. MENU

In the Home screen, user can click the "" icon at the left of the home screen to access the modules that are shown in the menu bar. Please refer to the illustration.



3. LOGIN

At the beginning of the day during the time of the market visit, user must mark the check-in using the login module.

User must click the “ ” icon at the top right of the screen and tap “**Check-in**” button.

4. SETTINGS

Settings helps the user to configure the available features in the application.

5. LOGOUT

At the end of the day, when the market visit is completed the user must do logout. User must click the “ ” icon at the top right of the screen and tap “**Check-out**” button.

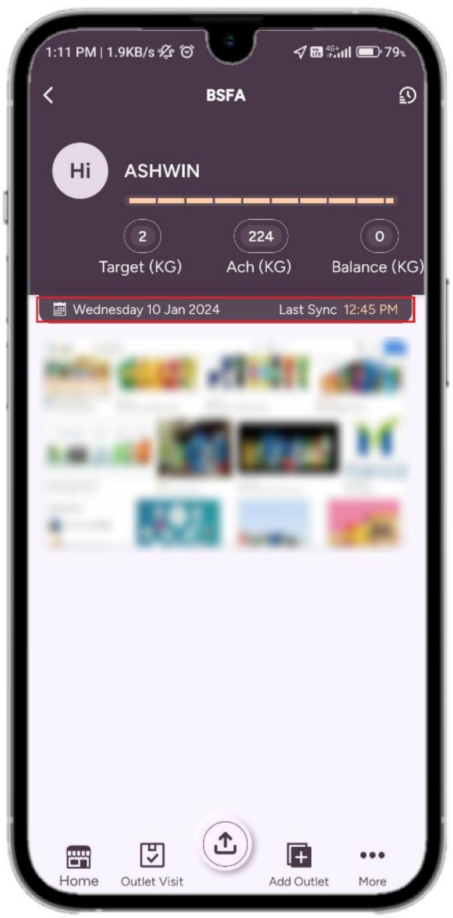
6. SYNC

Using the sync feature, the user can get the latest company products list and updated order billing status.

To do a manual sync,

Tap on the “” icon given at the center of the home screen.

Click “**Done**”.



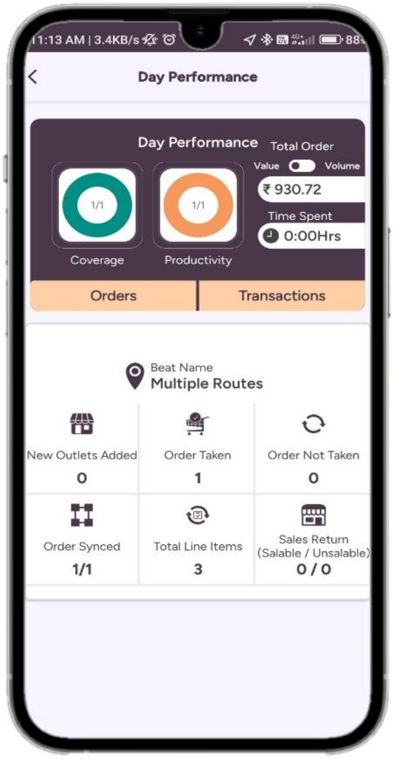
You can see the last sync details, below the user info in the Home screen.

7. SS VISIT

In the SS Visit page, the user can view a list of every distributor covered by the Sub Stockiest for the current day.

8. SKU SUMMARY

All the orders placed by the salesperson is shown in the SKU summary along with the complete order information.



9. DAY PERFORMANCE

The sales representative from the company can see the whole day performance of the salesperson using the day performance module.

5. MDSR Operations

5.1. Attendance

Once the user has started the day, they must log in and then indicate their attendance on the BSFA application using this module.

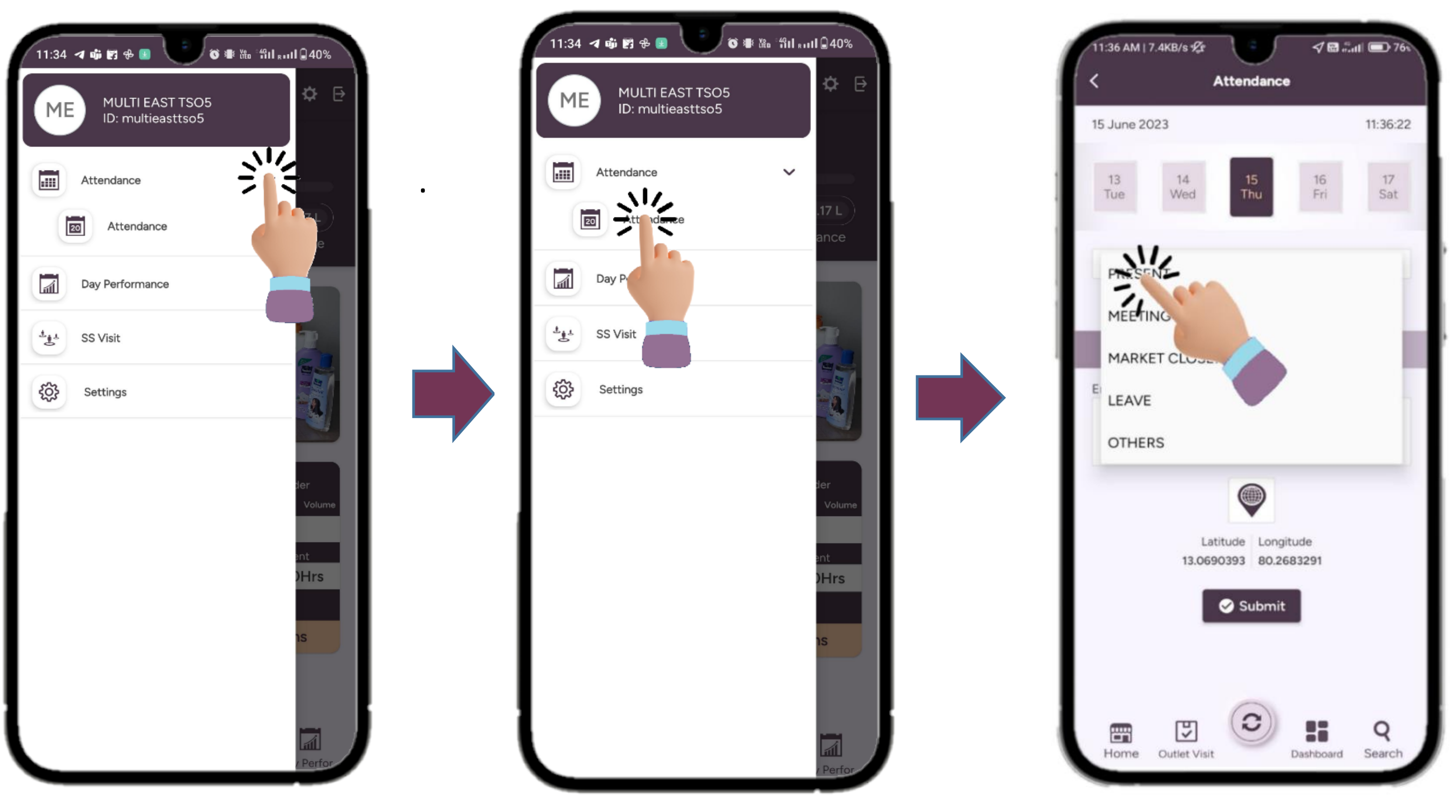
Do follow the below steps to complete the process.

Click “” icon at the left corner of the home screen.

You can see the list of modules available under attendance module.

Click the dropdown and select “**Attendance**”.

You can see the attendance screen.



Click the dropdown and select appropriate attendance status.

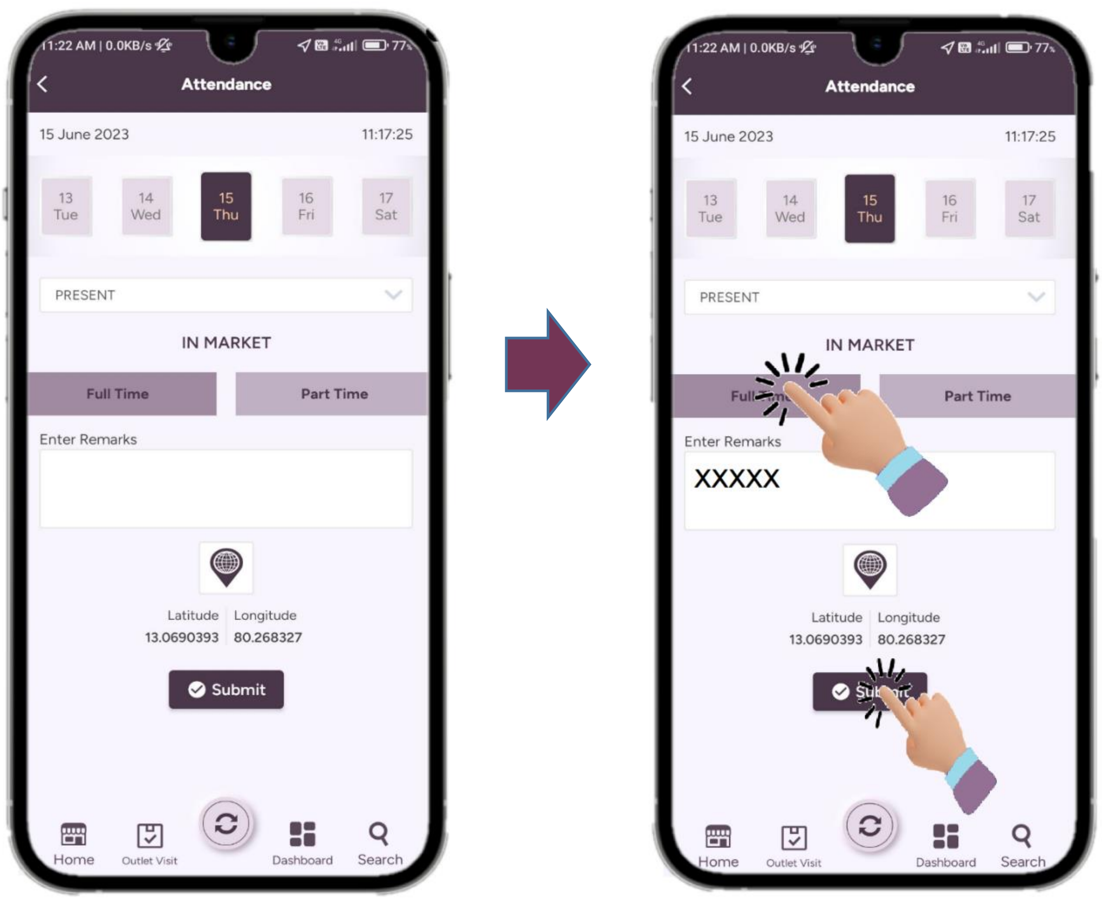
Then, select “**Full time**” or “**Part time**”.

If “**Full time**” is selected,

You can enter the remarks and click “**Submit**”.

Note:

Before reporting the attendance, make sure all of the information is accurate. Once an entry has been submitted, it cannot be changed.



If "**Part time**" is selected,

You must select time and enter the remarks.

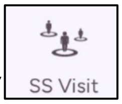
Click "**Submit**".

Note: For part time, you must set the start time and end time based on your shift.

5.2. SS Visit

After the MDSR has noted the attendance and begun the market visit by clicking the SS visit, distributor must be selected. Then, the MDSR can view the Home screen reserved just for that particular distributor.

Do follow the below steps to complete the process.

Click “

” icon from the home screen.

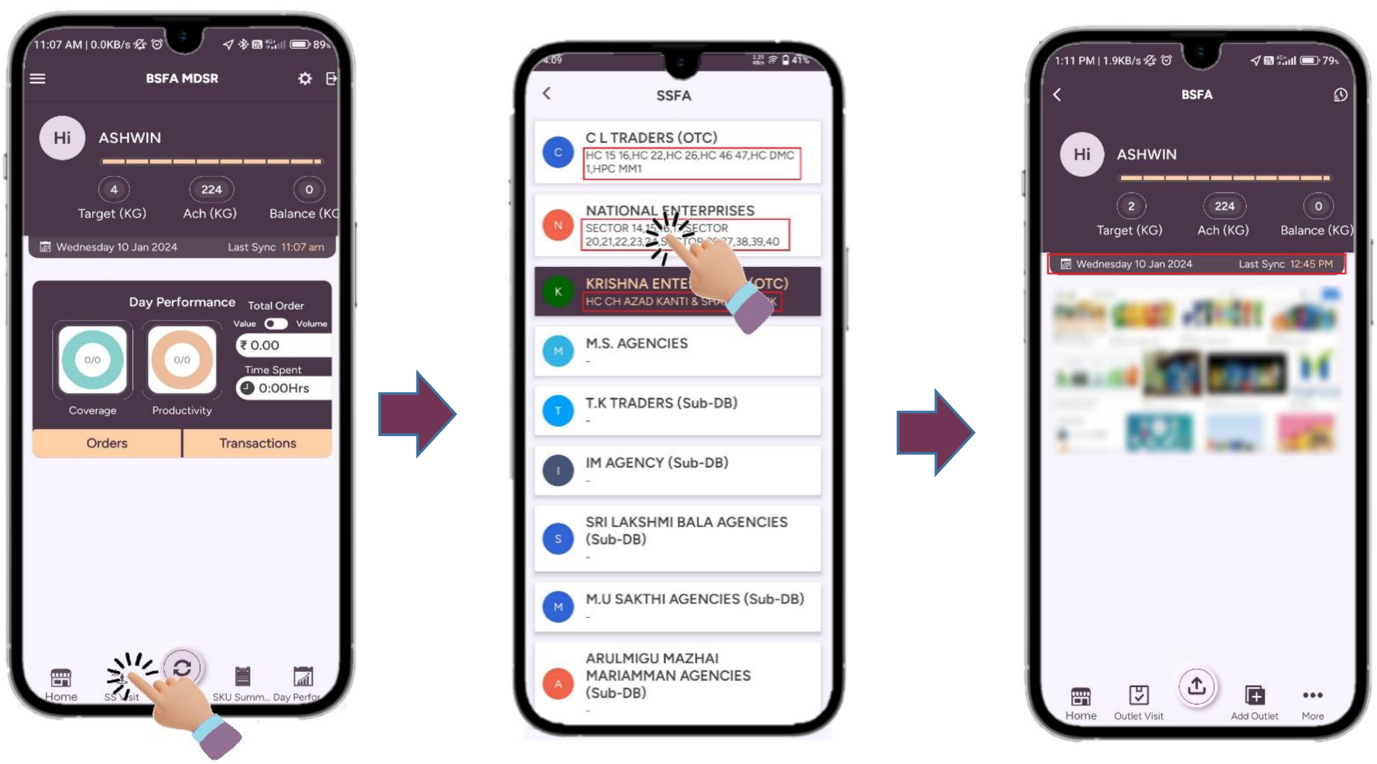
You can see the SS Visit screen.

Then, MDSR can select the distributor.

You can see the home screen kept for the particular distributor.

Note:

You can find the beats is mentioned under sub-stockiest, which represents the PJP for the day.

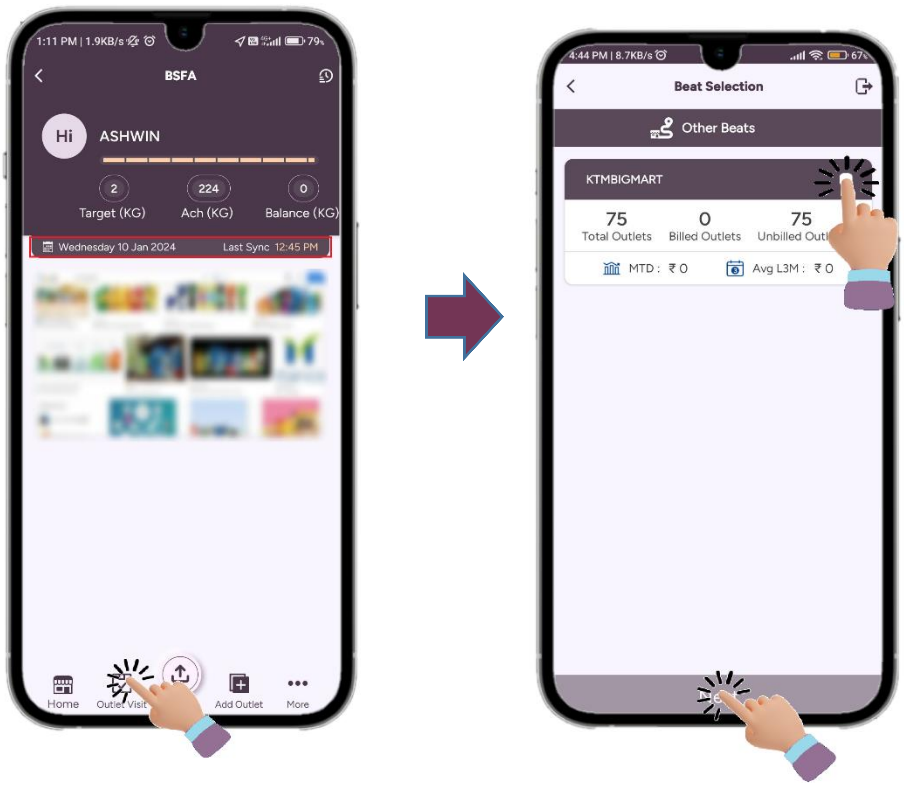


5.3. Outlet Visit

Once the MDSR completed the distributor selection in the SS visit module, the MDSR can began the outlet visit.

Do follow the below steps to complete the process.

Click “” icon from the home screen.



You can see the beat selection screen.

You can see the list of beats available.

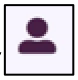
Select an appropriate beat.

Click “**Next**”.

Note: User must complete all the outlets available in the selected beat.

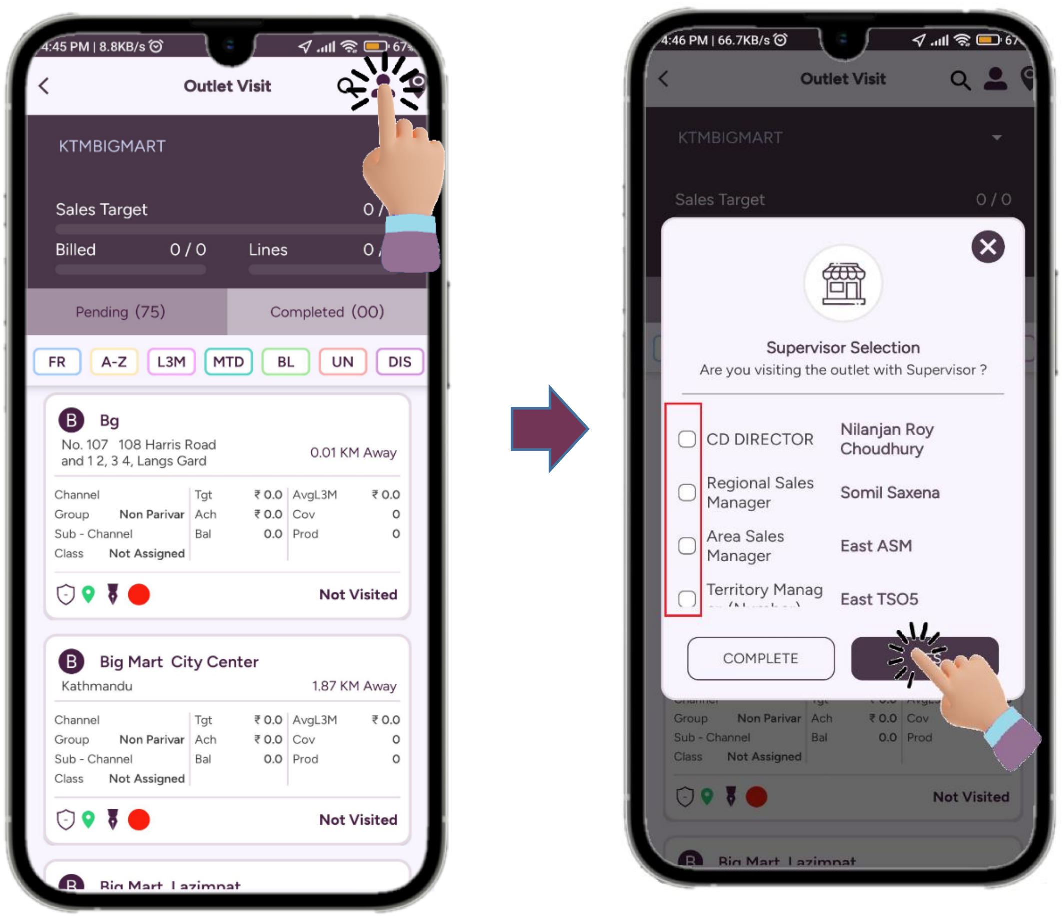
You can see the outlet visit screen.

Do complete the below steps to complete the process.

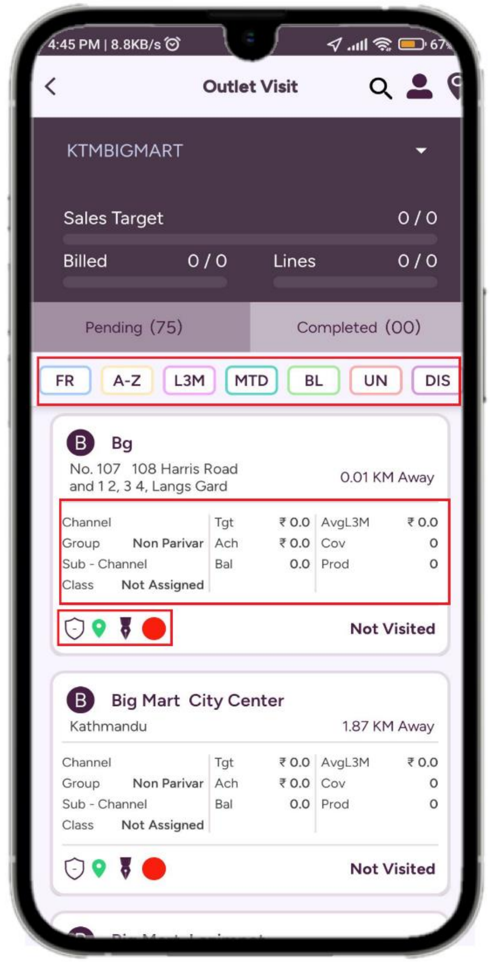
Click “ ”icon at the top right of the screen.

Select an appropriate supervisor.

Click “**Yes**”.



Click “ ” icon to see the location of the retailer.



To sort the outlets based on the below following option:

FR–Foot route

Note: By sorting of outlet based on the foot route, it provides the frequently visit outlets of the user.

A-Z – Alphabetical sort

Note: By sorting of outlet based on the A-Z, it provides the alphabetical pattern of the outlets.

L3M – Last 3 Months average sales

Note: By sorting outlets based on the L3M, it provides the last three months averages sales of the outlets.

MTD-Sorting of sales of the particular month sales

Note: By sorting outlets based on the MTD, it provides the sales of the particular months of the outlets.

BL – Billed Outlets

Note: By sorting outlets based on the billed, it provides the no. of outlets that are billed.

UN – Unbilled Outlets

Note: By sorting outlets based on the billed outlets, it provides the no. of outlets that are unbilled.

DIS – Based on the Outlet distance from the delivery user.

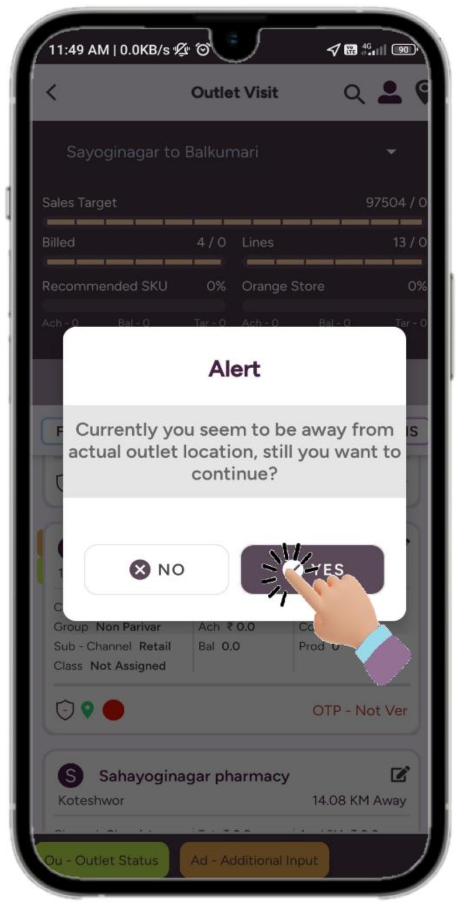
Note: By sorting outlets based on distance, it provides the nearest outlet to the delivery person.

You can see the different attributes highlighted in different colours below the name of the retail store.

You can click the “”icon to see the attribute name.

Click the outlet from the list.

You can see the geo fencing alert, if you are away from the outlet location.

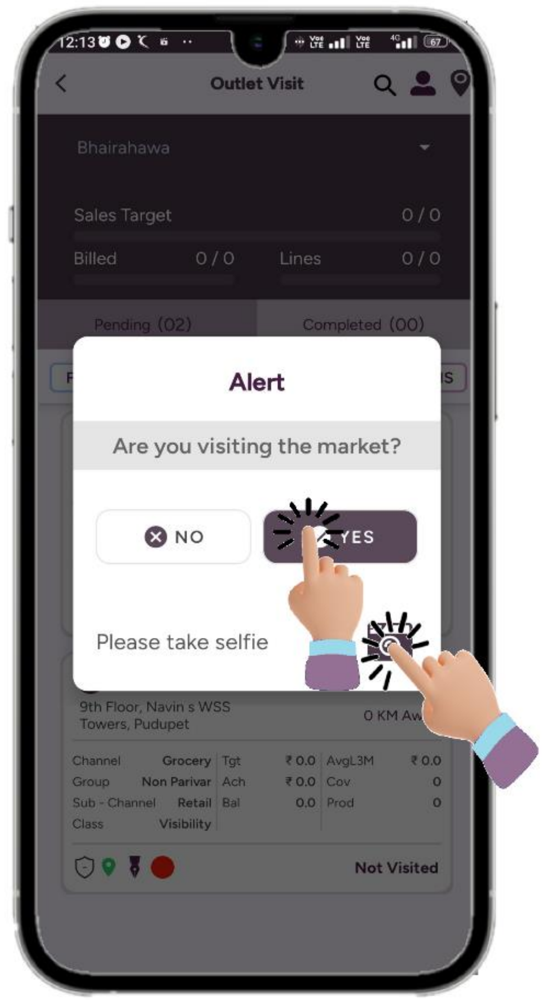


Click an outlet from the list shown.

You can see the geo fencing alert, if you are away from the outlet location.

Click "**Yes**" to continue the outlet visit.

Click "**No**" to finish the outlet visit.



If you are a sales executive,

Click "**Yes**" to visit the market.

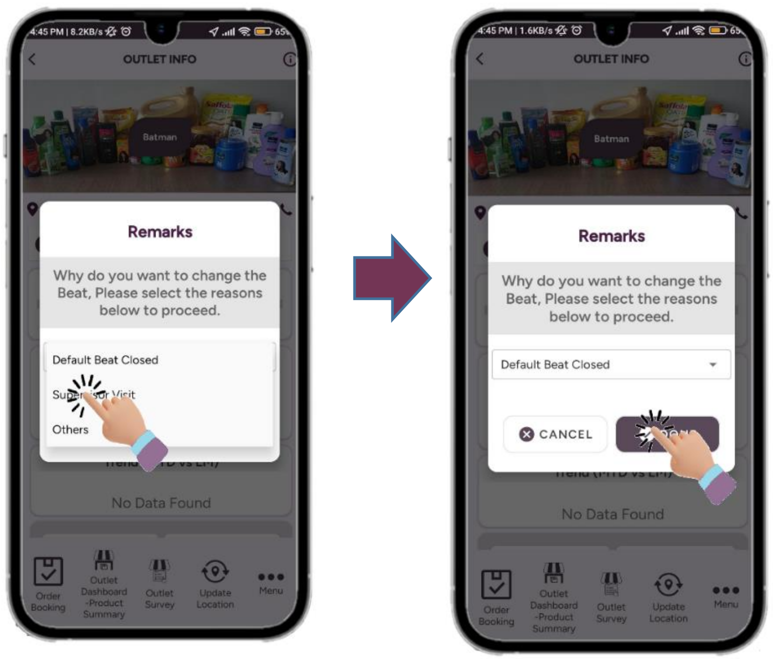
Then, capture the selfie.

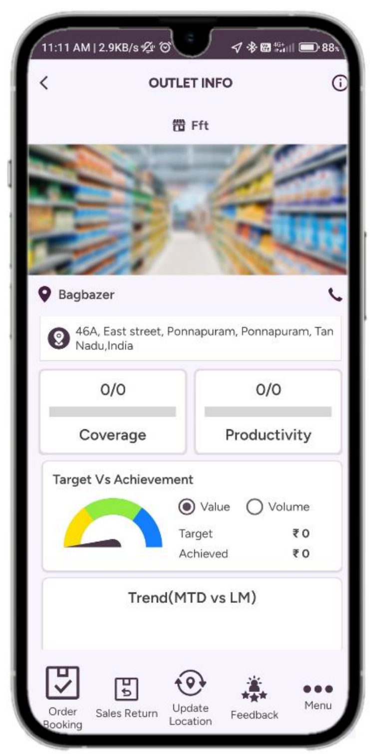
Once it is completed, a remark pop-up screen will appear.

If the salesperson want to change the beat.

Select appropriate remark.

Click "**Done**".





You can see the outlet info screen.

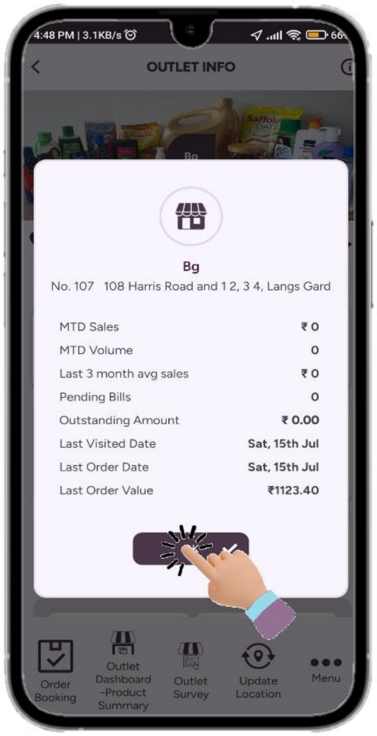
In the outlet screen, user can find information like coverage, productivity, target vs achievement, trend, top SKU, LPC, no. of. Pending orders, delivery & delivered.

In this outlet info screen, there is swipe out option to view the outlet images.

To view the further outlet information,

Click " " icon at the top right of the screen.

Click “**Ok**” to close the pop- up window.



5.4. Order Booking

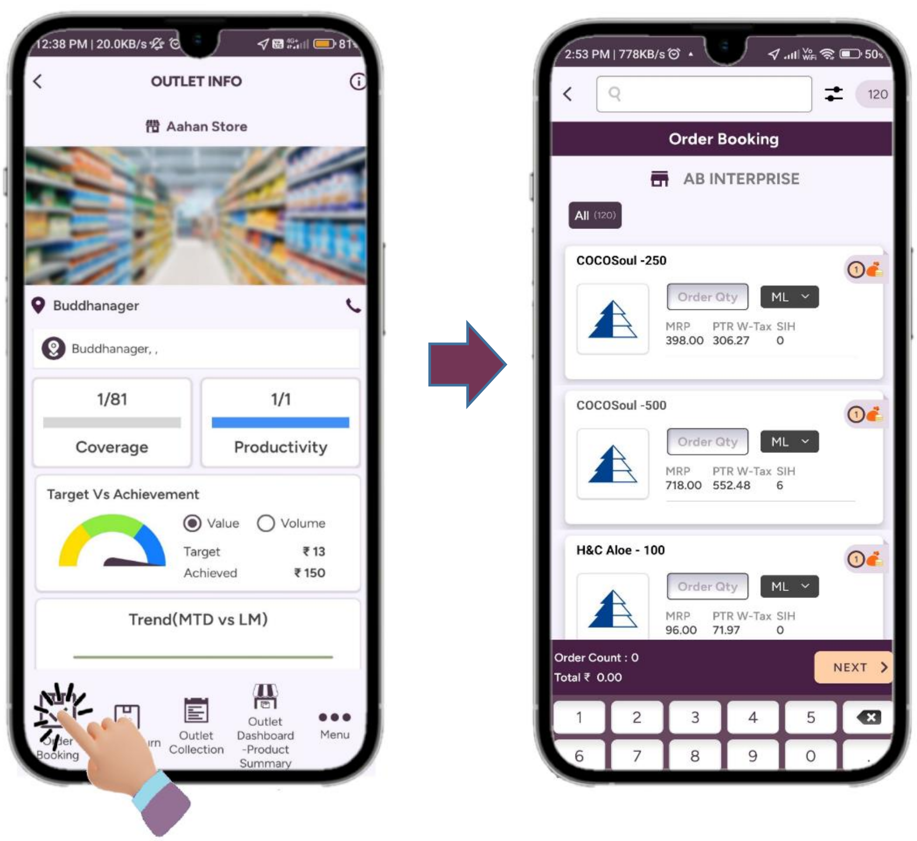
During the market visit, the MDSR can use this feature to place an order with retailers. Additionally, the MDSR can view the price value and available schemes for the particular product.

Do follow the below steps to complete the process.

Click “” icon from the outlet info screen.

You can see the order booking screen.

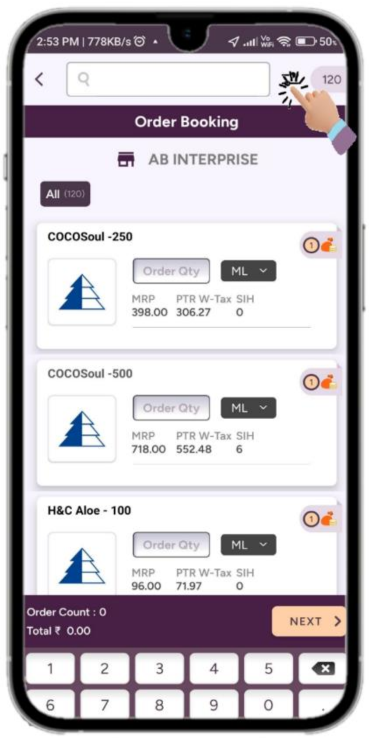
In this, the user can filter the products using the MRP on search option.



Click the " "icon to filter the products based upon the requirement from outlets.

Select appropriate filter.

Click "**Done**".

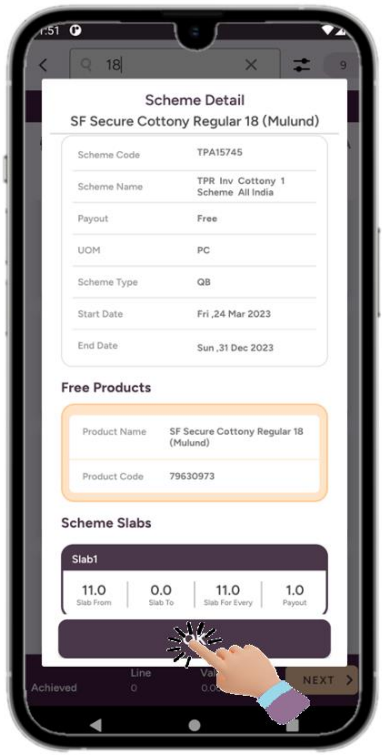


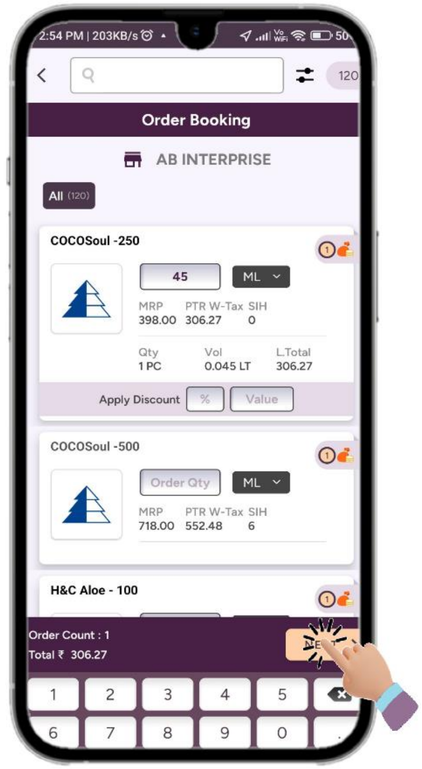
To see schemes available for a specific product, long press on the product.

A pop-up window with the scheme details appears.

You can see the free products in the scheme pouch.

Click “**Ok**” to close scheme details.



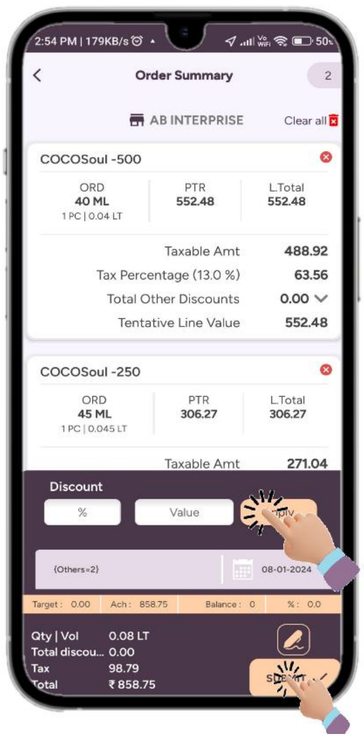


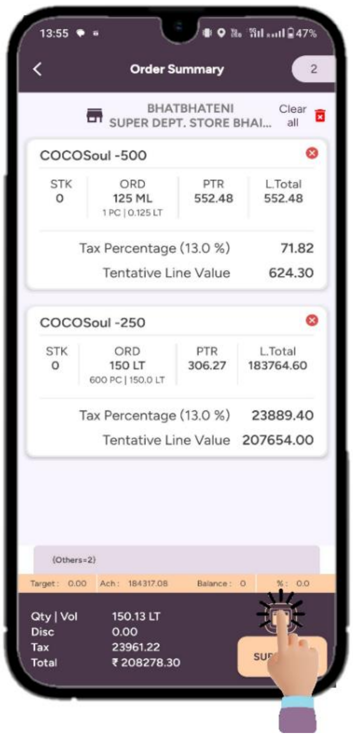
Enter the required product quantity.

Select the required UOM.

Click “**Next**” shown at the bottom of the screen.

Note: Verify the quantity is accurate before clicking the submit button.



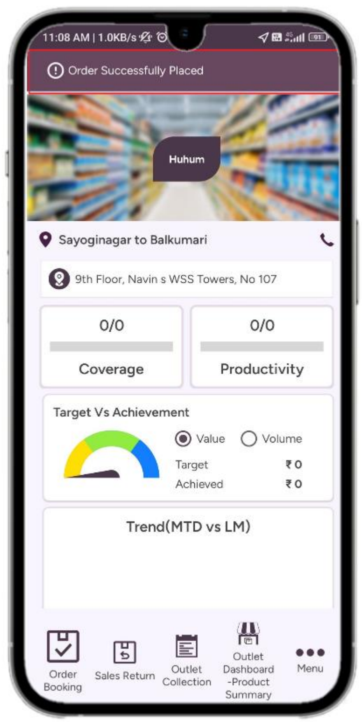


You can see the order summary screen.

You can provide line level discount for the products either in percentage or value.

Click “**Submit**”.

Once submitted, you can see the order confirmation snack bar.



5.5. Previous order

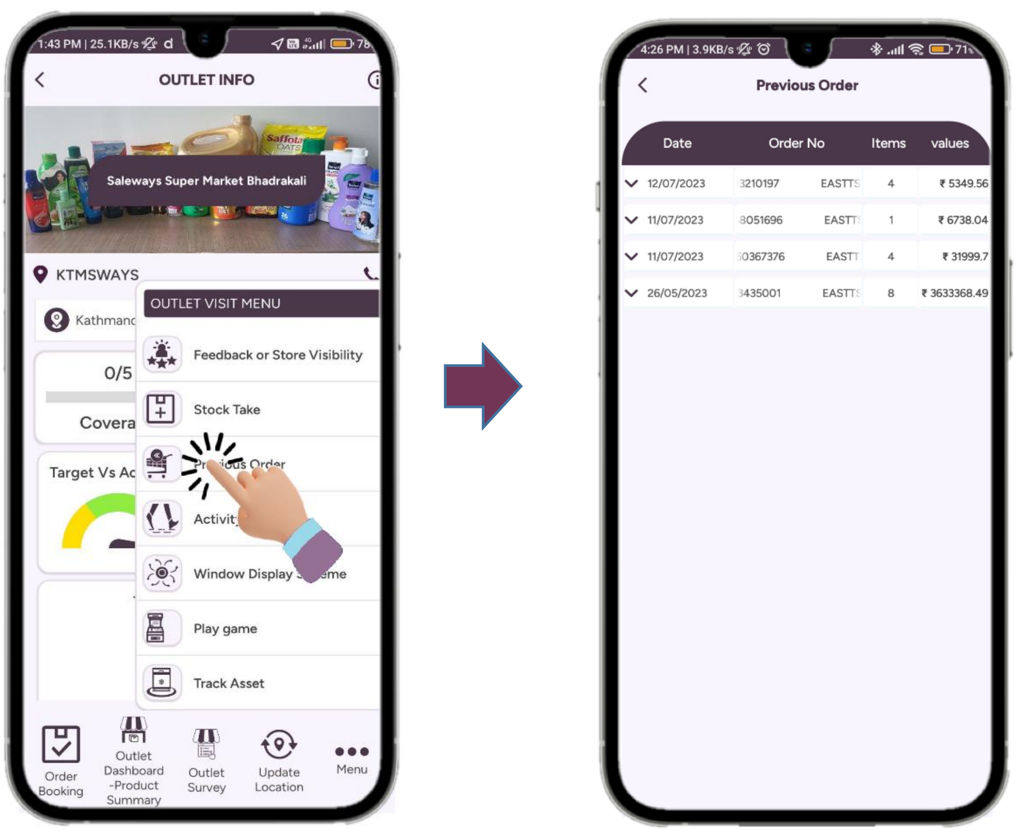
The salesperson can view the list of last five orders along with the complete order details.

Do follow the steps to see the previous order.

Click “” icon in the outlet info screen.

Select “**Previous order**” module.

You can see the previous order screen.

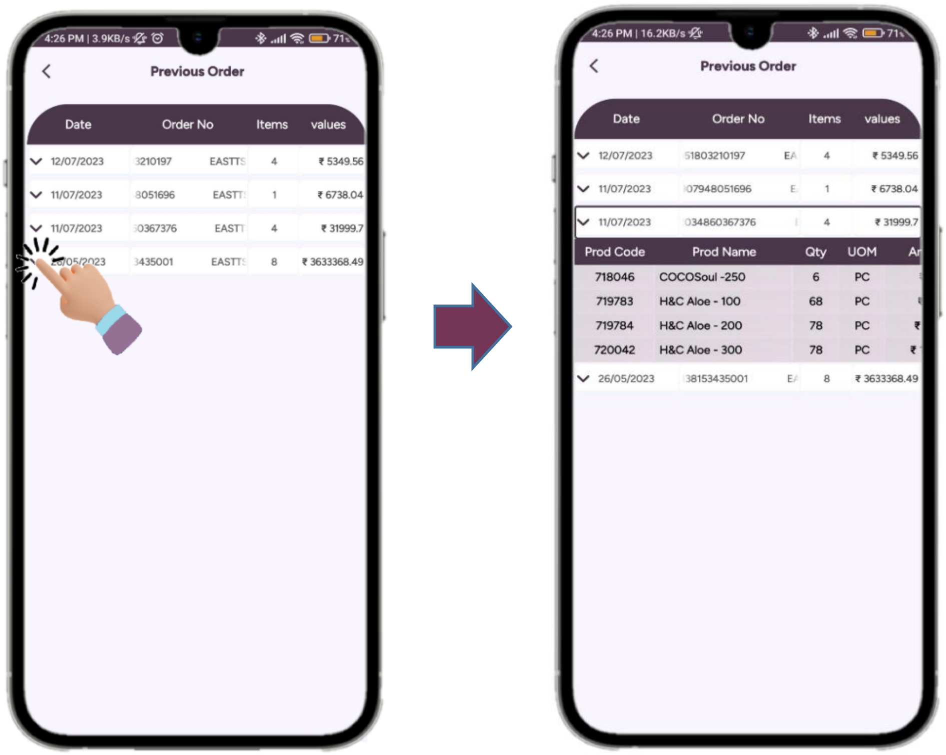


You can see the list of previous orders.

The previous order information like previous order date, order number, no. of. items, total value of those items are shown.

Click on the "" icon to view the complete order details.

You can scroll and see the entire order information.



5.6. Stock take

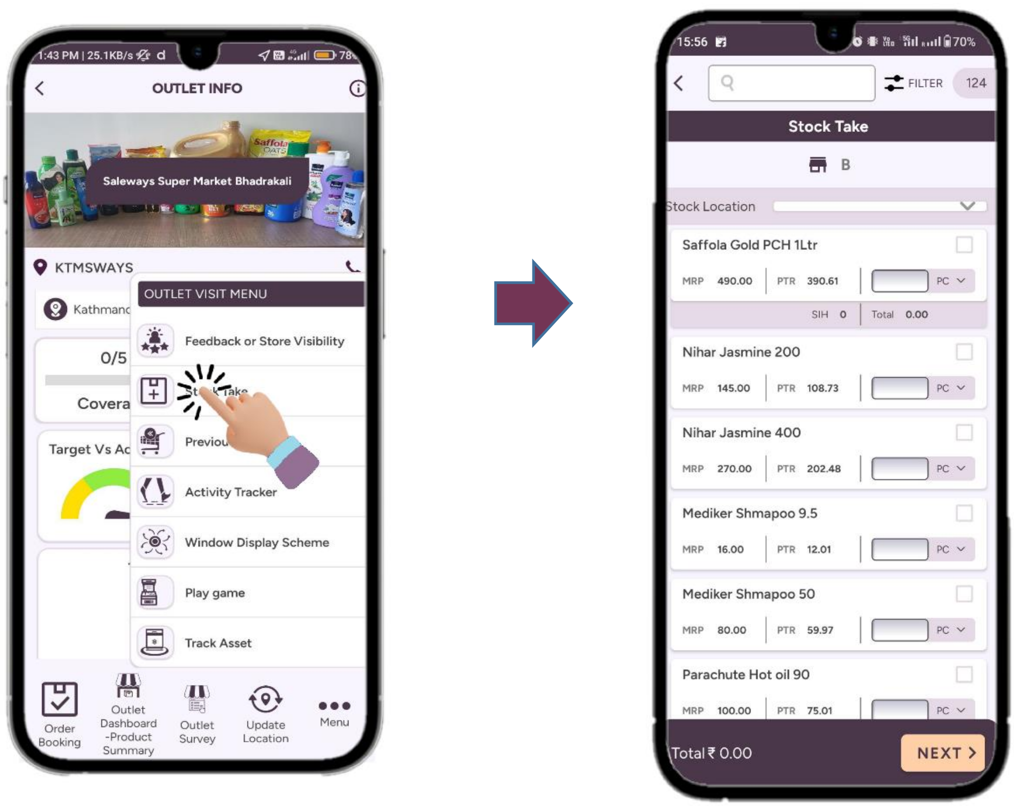
MDSR can use this feature to note down the in-hand stock from a particular retailer. Also, the MDSR can note the stock availability using this module.

Do follow the steps to complete the process.

Click “”icon from the outline info screen.

Select “”icon.

You can see the stock take screen.



Click “ ”icon to select the product filter.

Choose an appropriate filter.

Click “**Done**”.

Check the products in store and enter the quantity.

Note: Select the suitable UOM type either in PC or CS.

Click “**Next**”.

You can see the stock take summary screen.

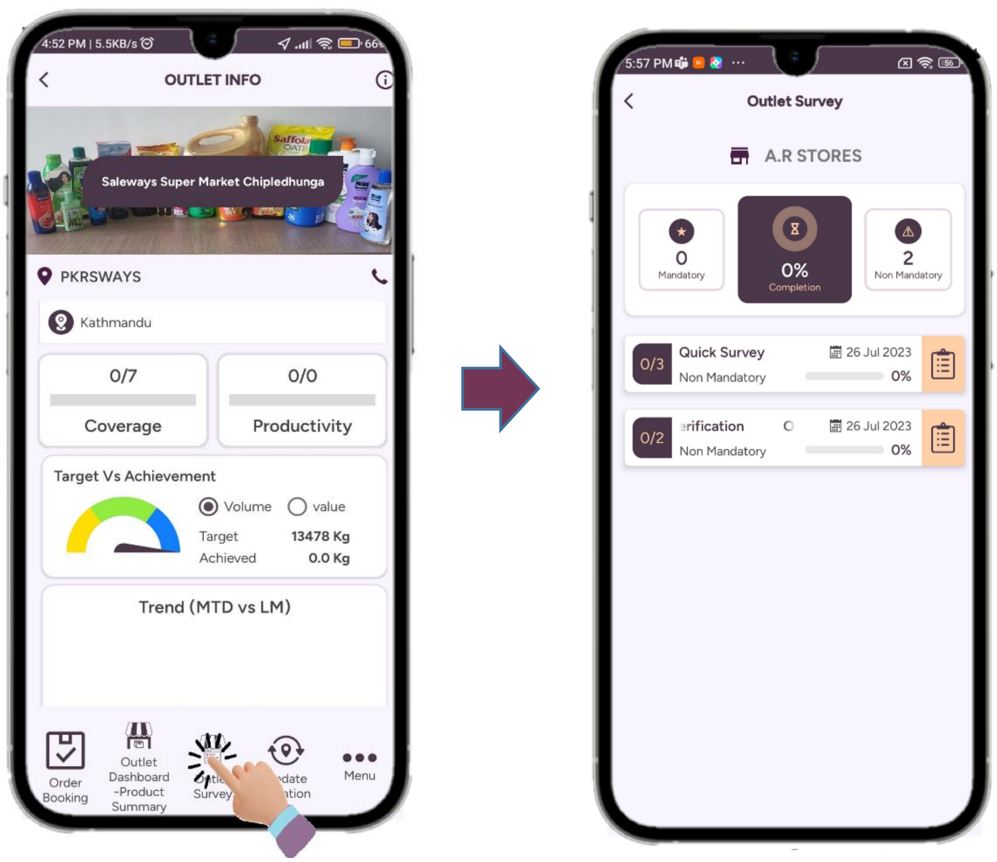
Click “**Submit**”.

5.7. Outlet survey

The salesperson uses the outlet survey module to keep track of the data that the company needs from the outlet.

Click ""icon from the outlet info screen.

You can see the outlet survey screen.

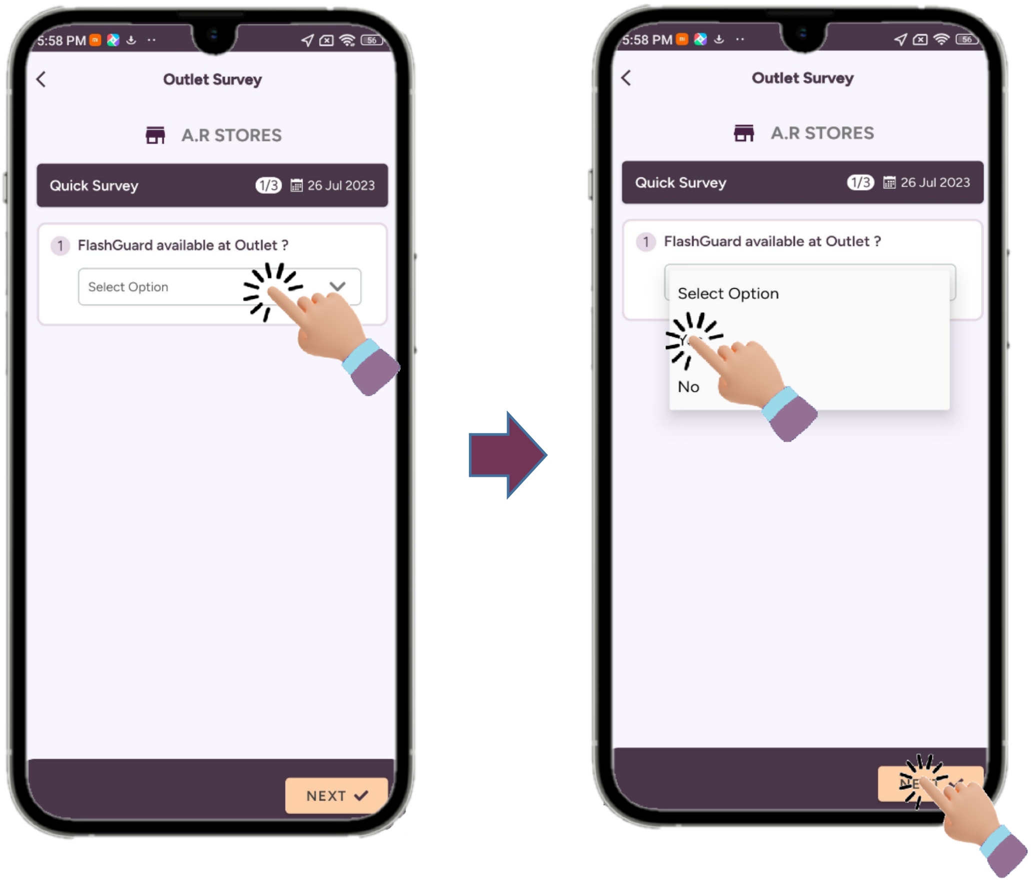


Click “”icon.

You can see the questions for the survey.

Click the dropdown and select appropriate answer.

Click “**Next**” to complete the process.



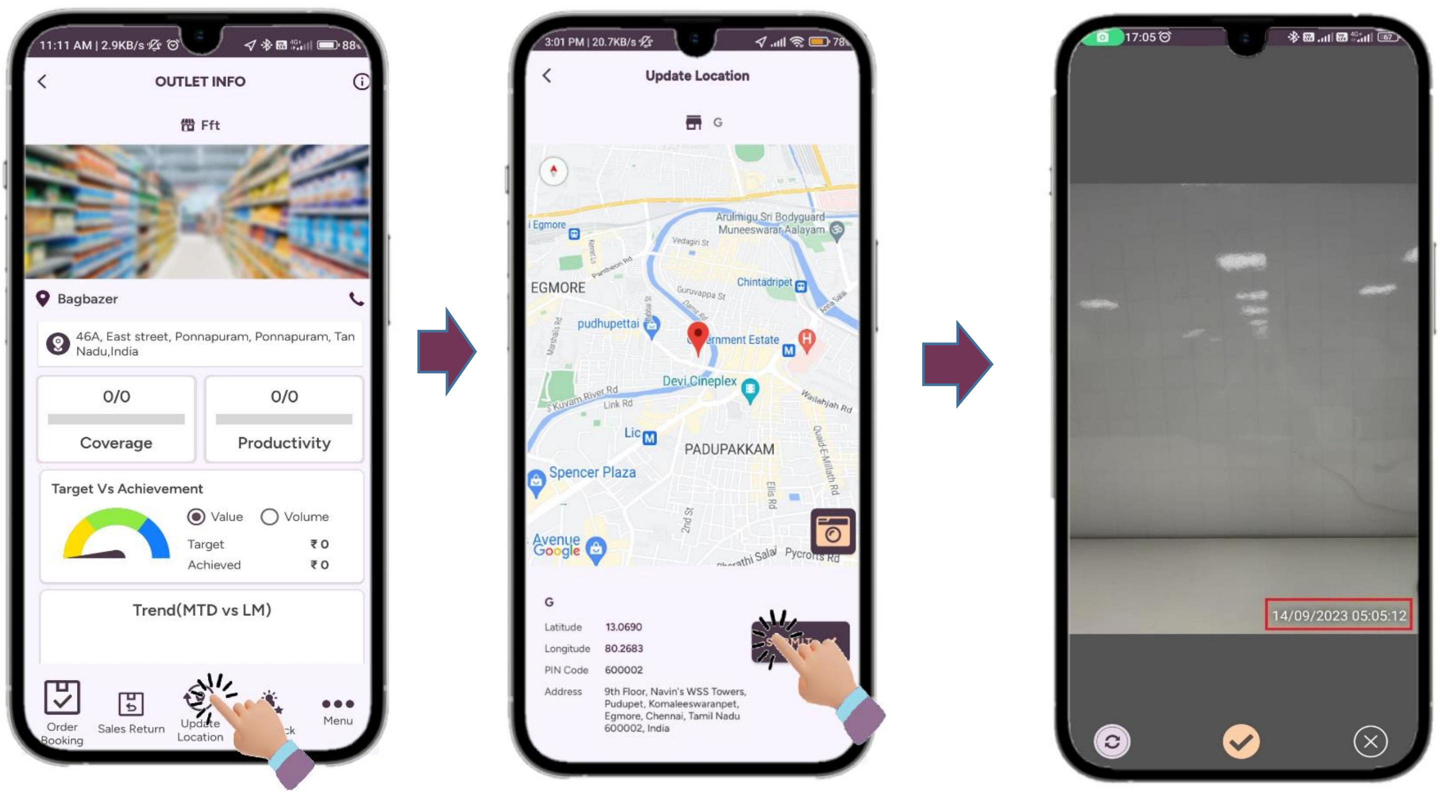
5.8. Update location

The salesperson can update the location of the outlet, if needed image can be attached.

Do follow the below steps to see the update location screen.

Click “” icon from the outlet info.

You can see the update location screen.



Note: Make sure you enable the location on you mobile. Make sure you are on the customer location and check whether the location is correct before submitting.

Check whether the location is correct.

To can add the image, click “ ”icon.

Note:

A time and date are automatically embedded in the image when a photo is taken.

Click “**Submit**”.

5.9. Add Outlet

MDSR works with multiple distributors and in the feature, the sales person can create a new Sub-Stockist. The salesperson must fill all the required information, verify the mobile number using OTP and complete the process to create a new Sub-Stockist.

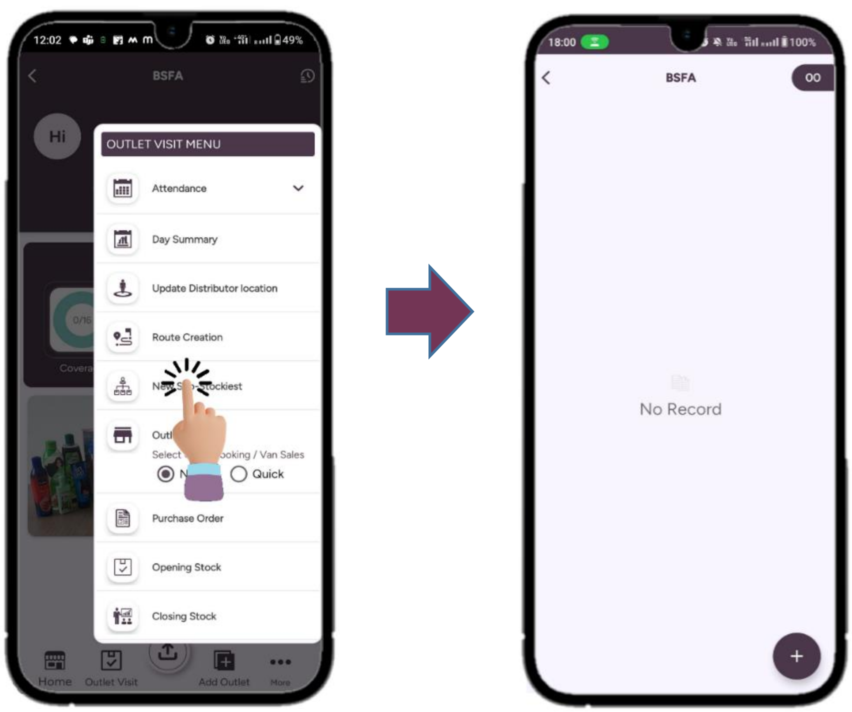
Do follow the below steps to complete the process.

Click “ ” icon from main screen.

Click “**Add Outlet**”.

You can see the add outlet screen.

Click“ ”icon to add a new outlet.



The below listed information can be seen while the sales person creates a new outlet.

1. Trade info
2. Retailer info
3. Retailer address
4. Hierarchy location
5. Outlet status

Trade Info

Click the " "icon seen at the top left of the screen.

Note:

A time and date are automatically embedded in the image when a photo is taken.

Click the dropdown and select appropriate route.

Click the dropdown and select suitable channel.

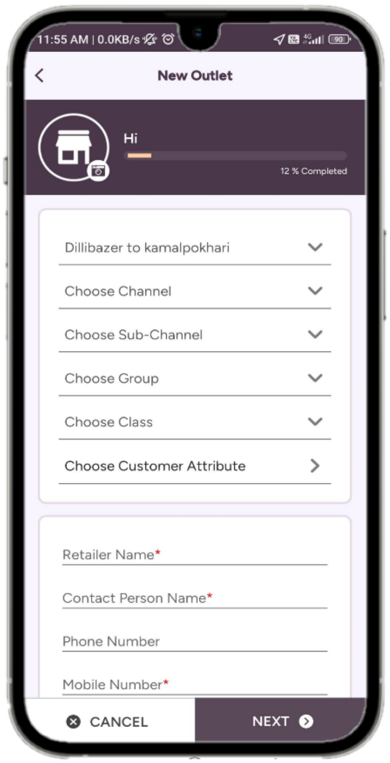
Click the dropdown and select appropriate sub-channel.

Note: Sub channel is auto detected based on the channel selection.

Click the dropdown and select group.

Click the dropdown and select class.

Click the dropdown and select customer attribute.



Retailer Info

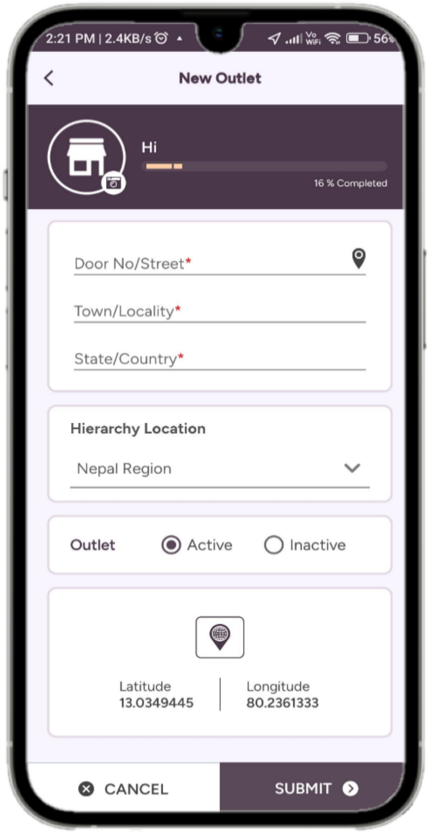
Enter the retailer address or click “ ” icon to locate the address.

Hierarchy Location

You can select the retailer’s location in the hierarchy selection.

Outlet Status

You can select the status of the outlet.



5.10. Purchase order

Do follow the below steps to complete the process.

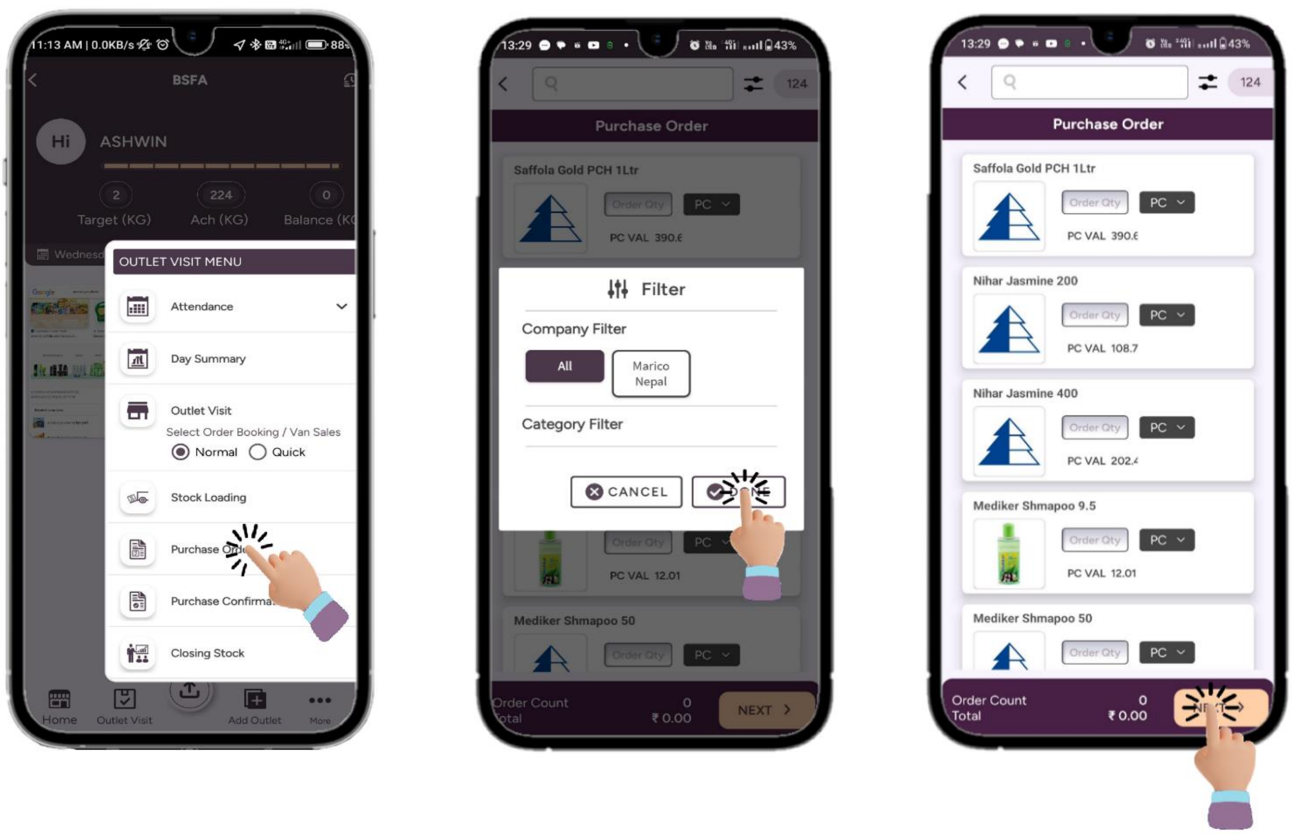
Click “●●● ” icon from main screen.

Click “**Purchase order**”.

Click “ ”icon to filter the products based upon the requirement from outlets.

Select appropriate filter.

Click “**Done**”.



Enter the required product quantity.

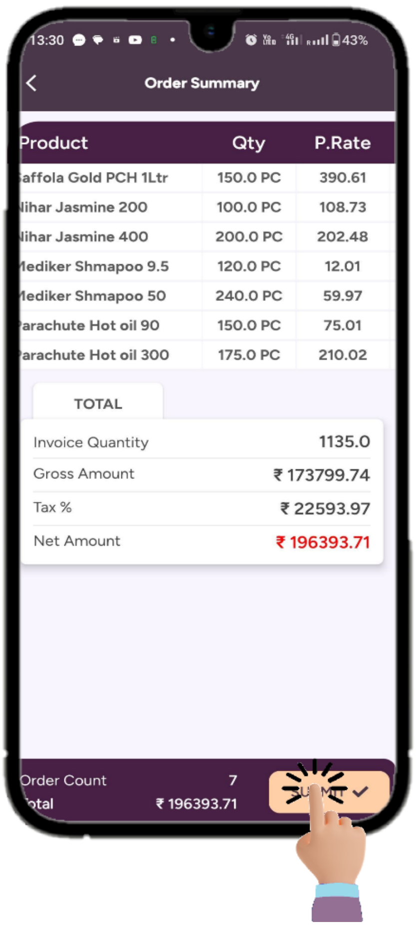
Select the UOM in PC or CS.

Click “**Next**” shown at the bottom of the screen.

Note: Verify the quantity is accurate before clicking the submit button.

You can see the order summary screen.

Click “**Submit**”.



5.11. Dashboard

The dashboard provides the detailed information about the sales statistics, sales target, invoice details and product billing related information. In this dashboard, you can find the 2 main screens listed below.

→MTD Dashboard

→Products

5.11.1 MTD Dashboard

This dashboard provides the detail information about the sales target. Month to Date (MTD) sales and for sales executive to plan the work. In addition, menus provide the clear view on the statics and sales report to sales executive to improve the performance.

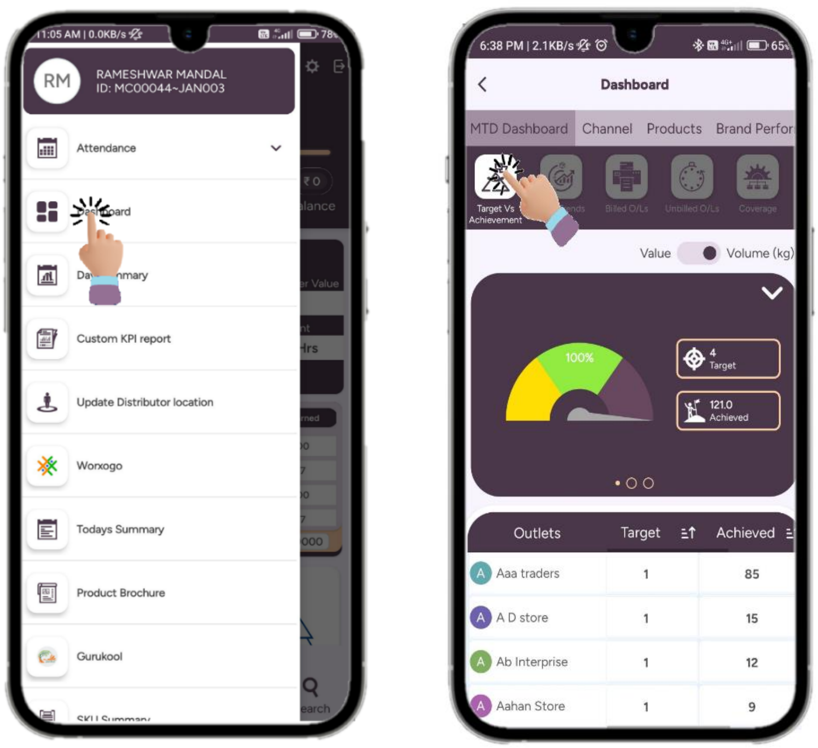
Target Vs Achievement

To know more about the set target and your achievement from first day of every month to till date.

Do follow the below steps to get the target and achieved statistic report of your team members and the distributors.

Click “**Dashboard**” from the main menu.

Click “**Target Vs Achievement**” available in the MTD dashboard.



Note: You can use the drop down to get the achievement either in value or volume.

- Value – Total amount of billed transaction for the Month To date (MTD)
- Volume – Total weightage (Kilogram) of the billed product for the MTD.

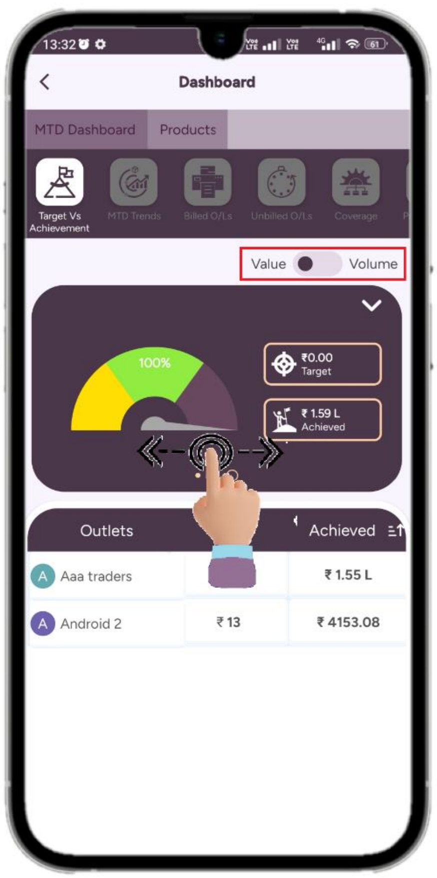
Tap the button to view the target Vs achievement in value or volume
Swipe left to get the updated daily sales data for the Month To Day (MTD).

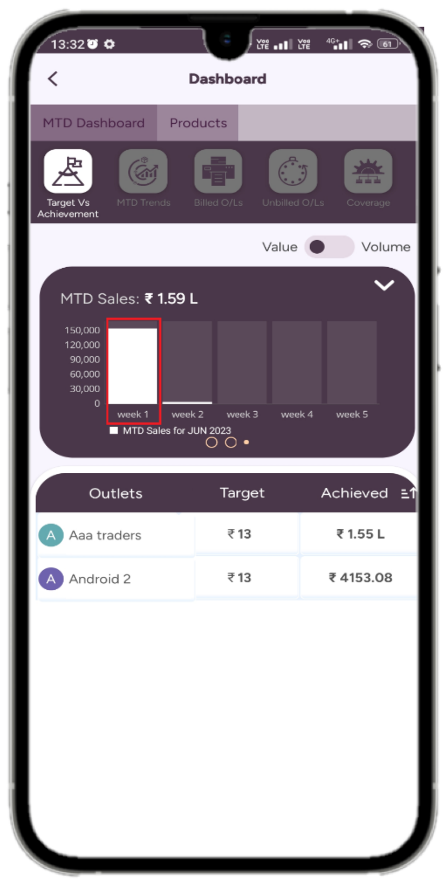
Click any of the graph bar to get the sales data for the particular day.

Again, swipe left to get the updated weekly sales data for the MTD.

You can see the target and achieved in value for particular outlet.

You can see the target and achievement in volume for particular outlet.





MTD trends

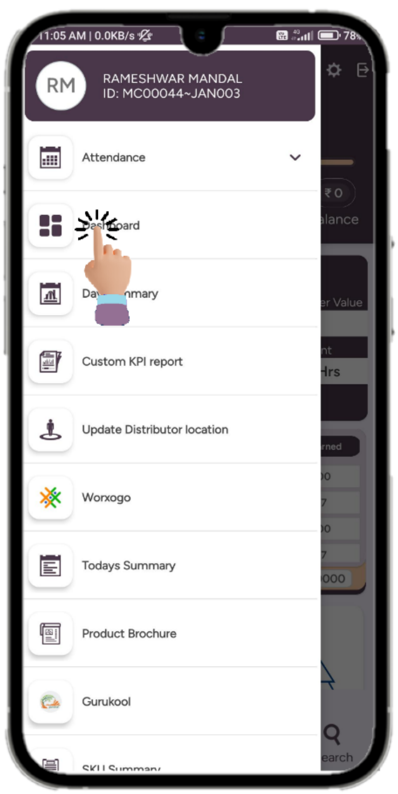
To compare previous month data with current month data and generate the statistics report.

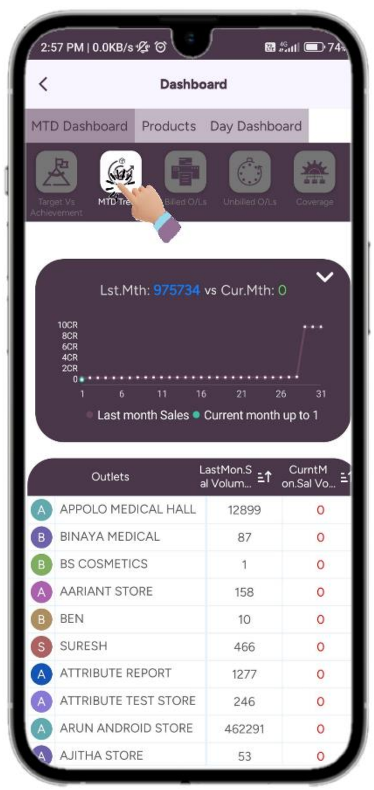
Do follow the below steps to get the month to date report of your team members and the distributors.

Click “**Dashboard**” from the main menu.

Click “**MTD trend**” on the dashboard.

You can see the comparison graph of the last month and current month sale data and generate the statistics report.



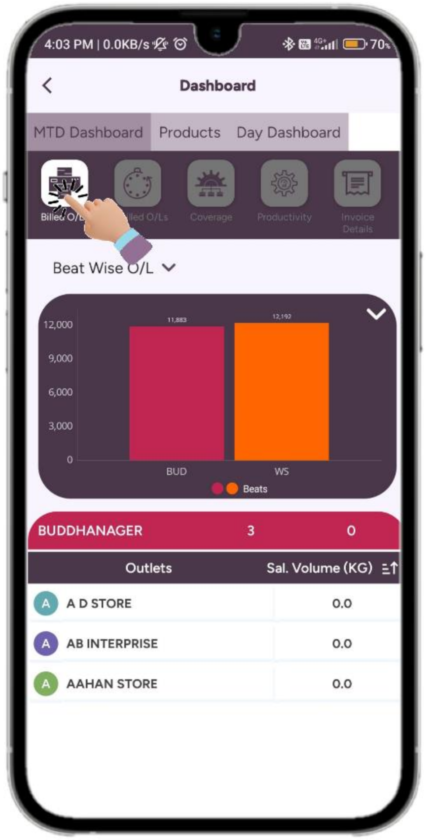


Billed O/Ls

To show the list of outlets paid for their order

Do follow the below steps to get the billed outlets.

Click the "**Billed O/Ls**" on the dashboard.



Click the dropdown,

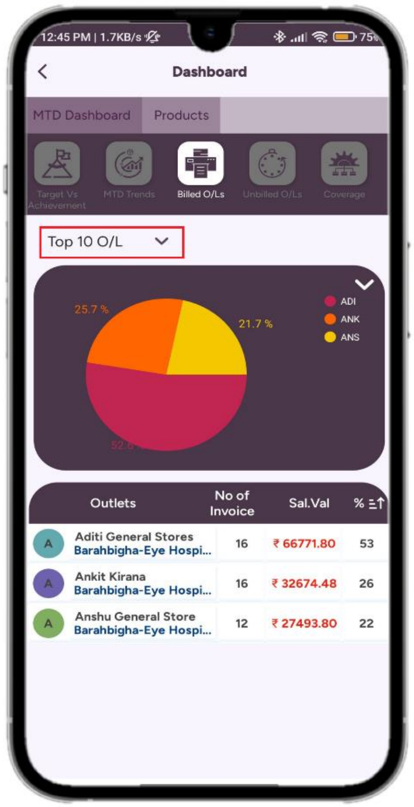
You can see the pie chart and table of "**top 10 outlets**" and its billed value of each outlets.

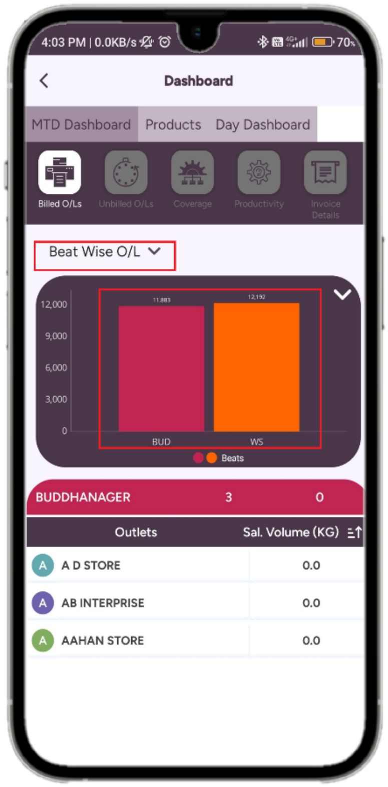
Click the dropdown and select the “**Beat Wise Outlet**”.

You can see the beat wise graph and its value on the top of graph.

Click any of the graph bar.

You can see the total outlets in the particular beat and the billed value of each outlet in the table.





Unbilled O/Ls

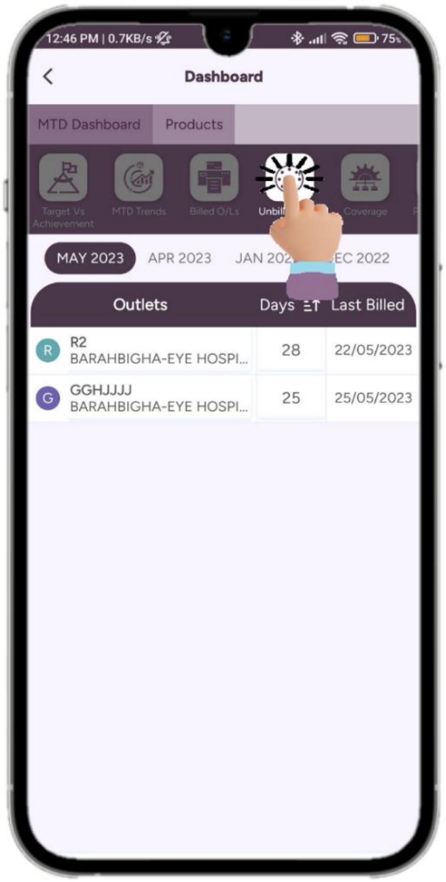
To show the list of outlets not paid for their order.

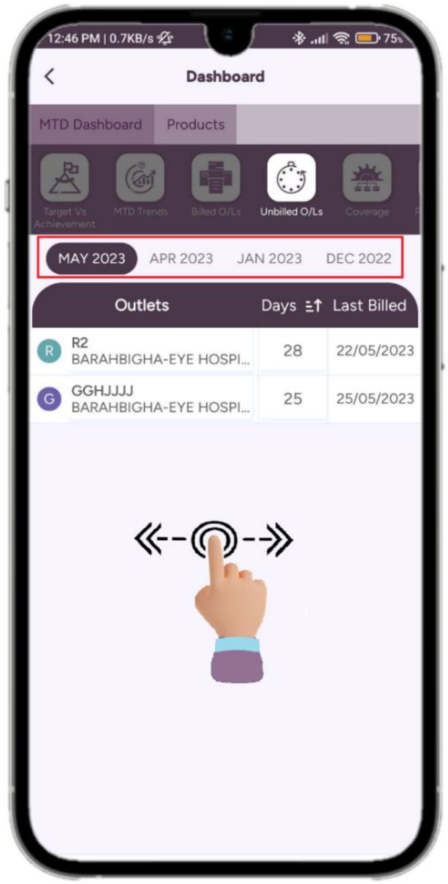
Do follow the steps to get the Unbilled outlets.

Click the "**Unbilled O/Ls**" on the dashboard.

You can see the outlets and its last billed date of the particular month.

Note: You can choose the month on the top to get the unbilled outlets information for the particular month.





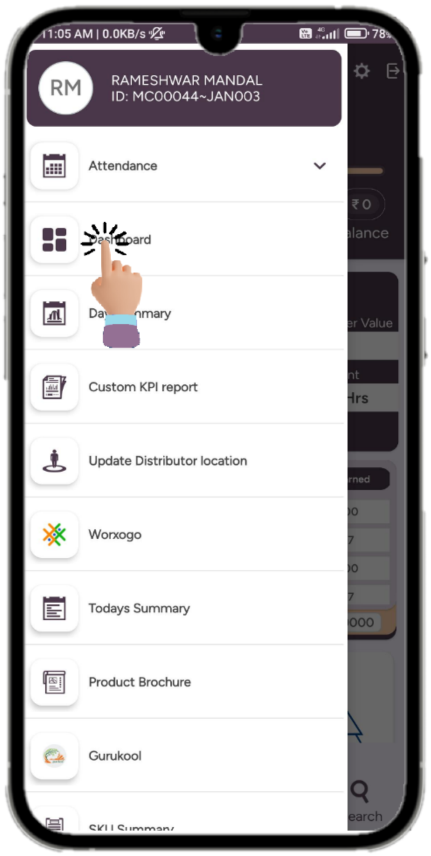
Beat wise-Coverage

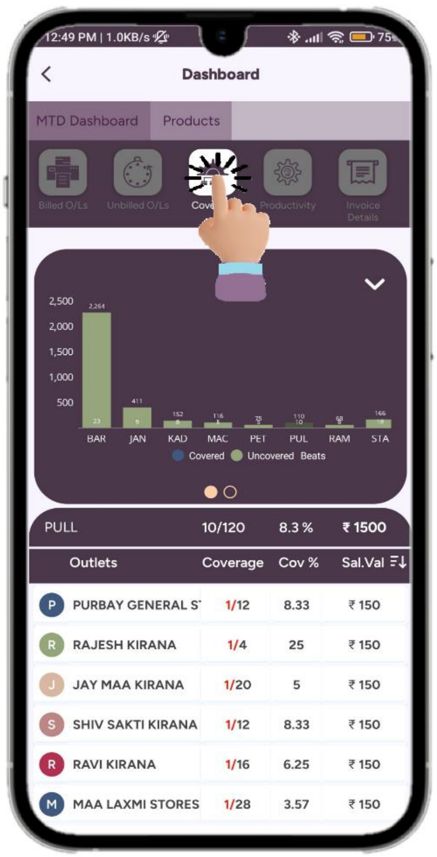
To show the total number of covered and uncovered outlets in graph form.

Do follow the steps to get the beat wise coverage.

Click the **“Dashboard”** from the main menu.

Click the **“Beat Wise Coverage”** on the dashboard.





Click the dropdown,

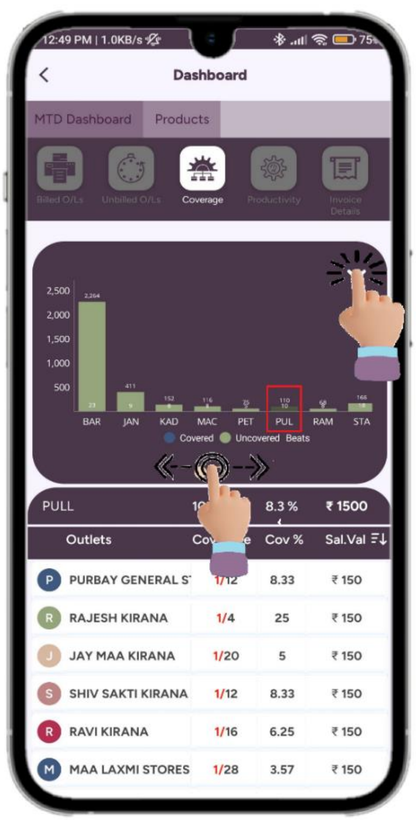
You can see the covered and uncovered beats wise graph and its value on the top of the graph.

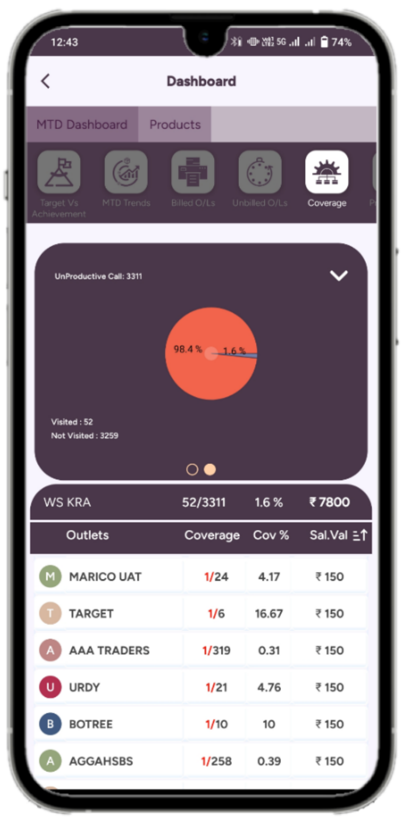
Click any of the graph bar.

You can see the total outlets, which is covered and uncovered, coverage percentage and the sales value for the each outlets in the table.

Swipe the graph bar,

You can see the pie chart shows the covered percentage, total count of visited, not visited beats and unproductive call



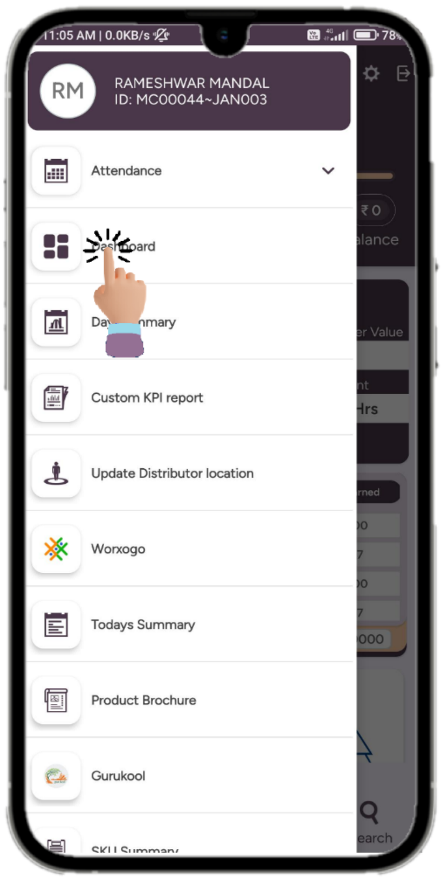


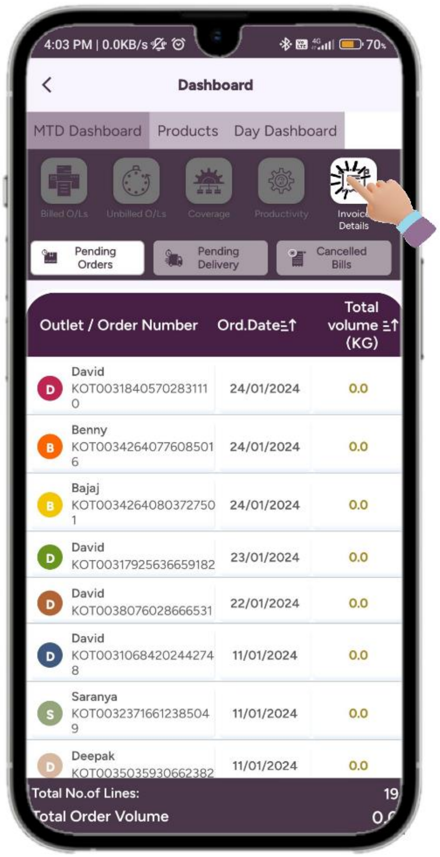
Invoice details

To show the invoice details about the pending orders, pending delivery and cancelled bills.

Click the **"Dashboard"** from the main menu.

Click "**Invoice details**" on the MTD dashboard.





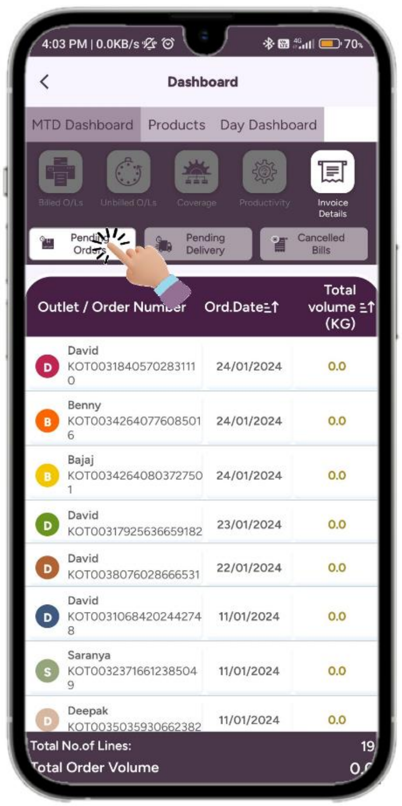
Click the "**Pending orders**".

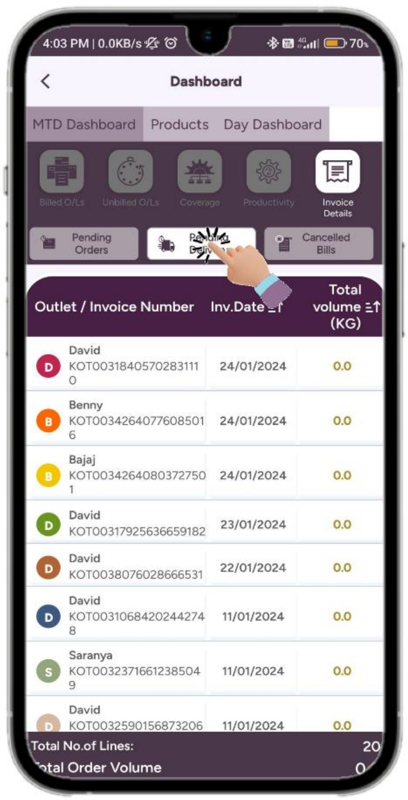
You can see the invoice date and the sales values of the each outlet/invoice number in the table.

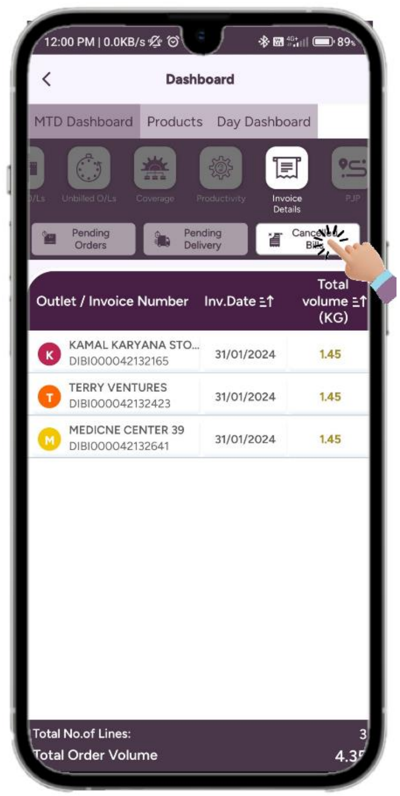
You can see the invoice details of pending orders.

Swipe to view the pending delivery and cancelled bills.

Note: For pending delivery and cancelled bill, you must follow the same procedural steps given for the pending orders.







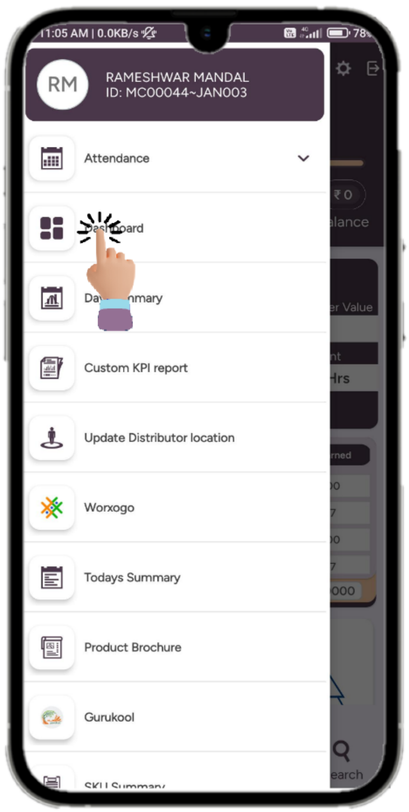
Productivity

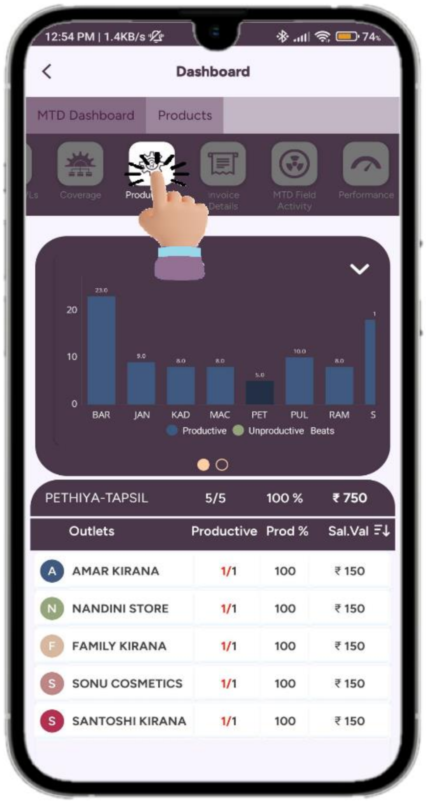
To show the total number of outlets order placed in which the sales executives are visited for the day in pie chart form.

Do follow the steps to get the productivity.

Click **“Dashboard”** from the main menu.

Click **“Productivity”** on the MTD dashboard.





Click the
dropdown,

You can see the productive and unproductive beat wise graph and its value on the top of the graph.

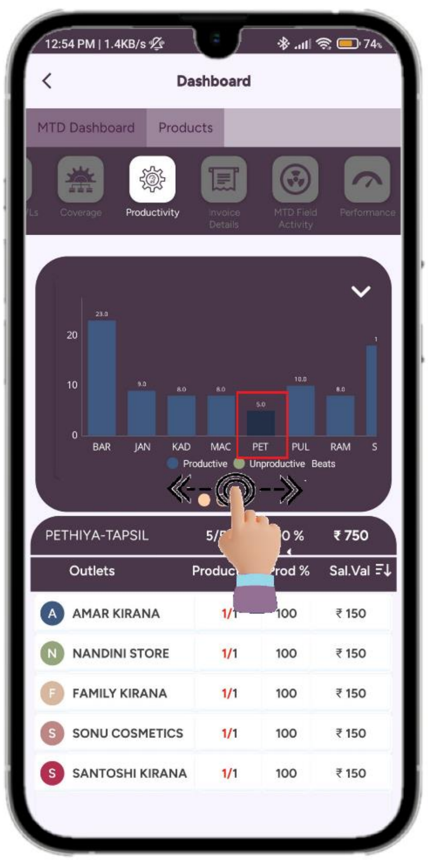
Click any of the graph bar.

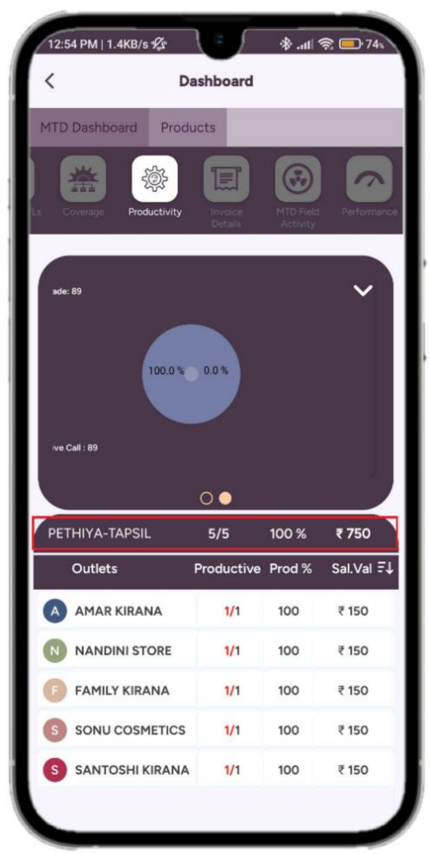
You can see the total outlets in the particular beat its shows the productive,

productive percentage and sales value of each outlet in the table.

Swipe the graph bar to see the pie chart and table of each outlets and its

productive calls made.





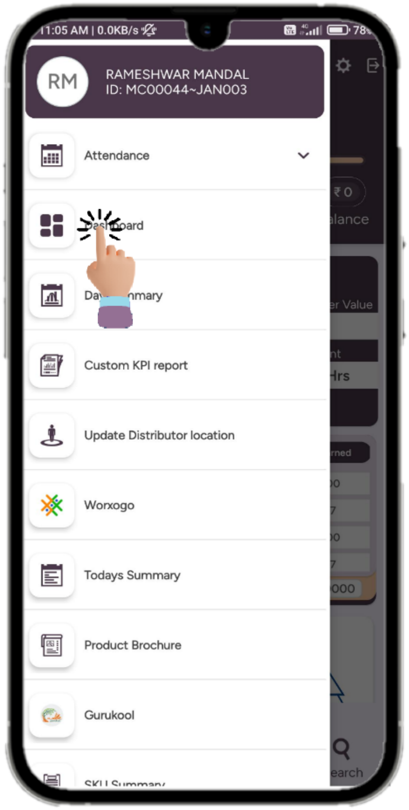
Performance

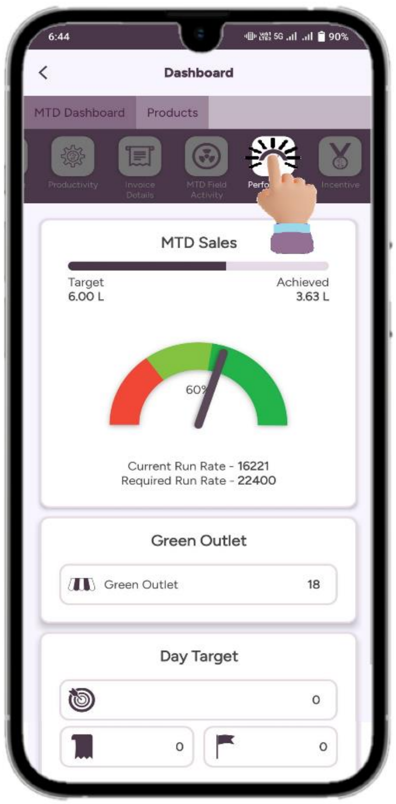
The sales performance is shown from the beginning of the month till current date.

Do follow the steps to know the performance.

Click **"Dashboard"** from the main menu.

Click **"Performance"** on the MTD dashboard.





You can see the target vs achieved sales performance in the meter indicator with count on current run rate and required run rate.

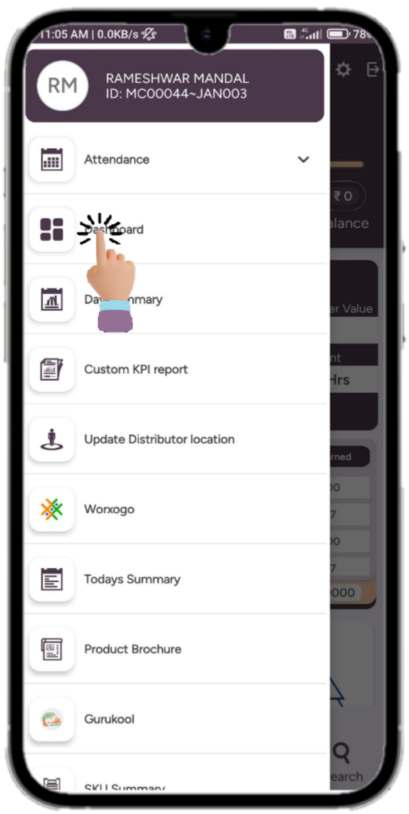
Custom KPI

The KPI report of each salesman can be viewed in detail using this module.

Do follow the steps to know the Custom KPI.

Click **"Dashboard"** from the main menu.

Click **"Custom KPI"** on the MTD dashboard.



You can see the custom KPI values of each salesman on different parameters.

5.11.2 Product

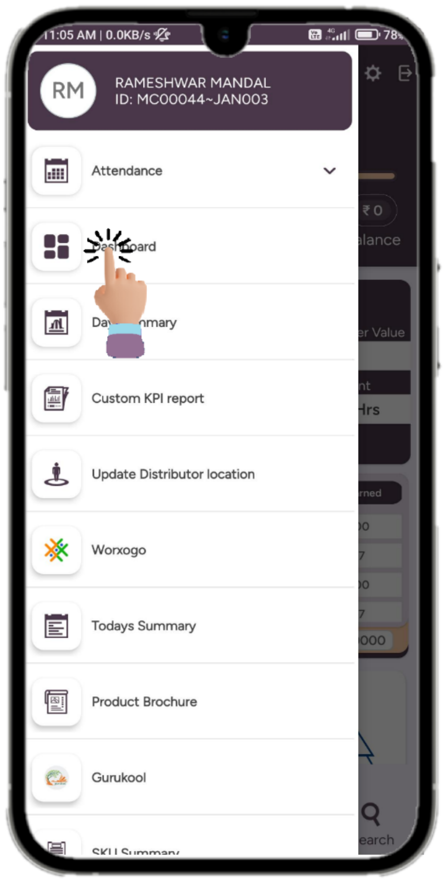
This dashboard provides the detail information about the sales, delivery, stock availability in store with respect to the specific product. In addition, menus provides a clear view on the statistics and sales report about the particular product which help to provide more schemes and promotion to increase the sale of the product.

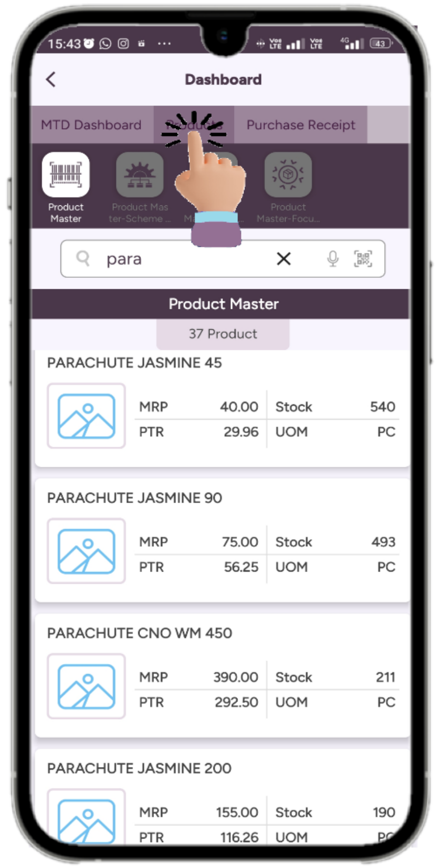
Product Master

In this feature, the salesperson will be able to view the list of products available with the distributor. Also, the user can get the information of the product's stock availability, PTR, product image, UOM, MRP.

Click **"Dashboard"** from the main menu.

Click **"Product"** from the dashboard.



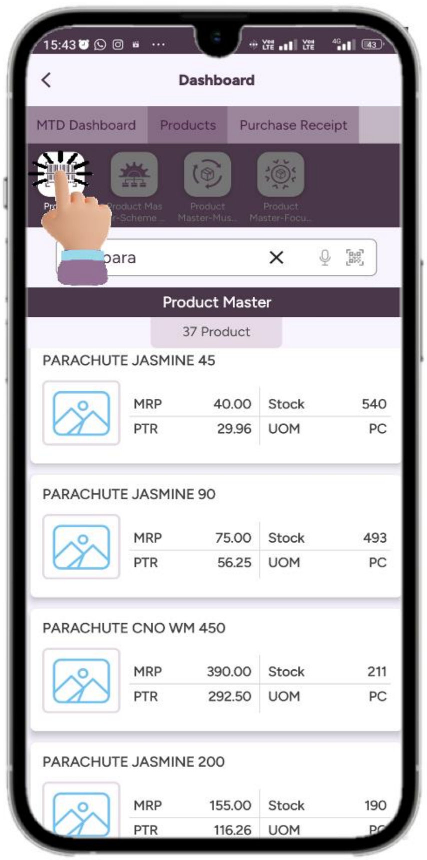


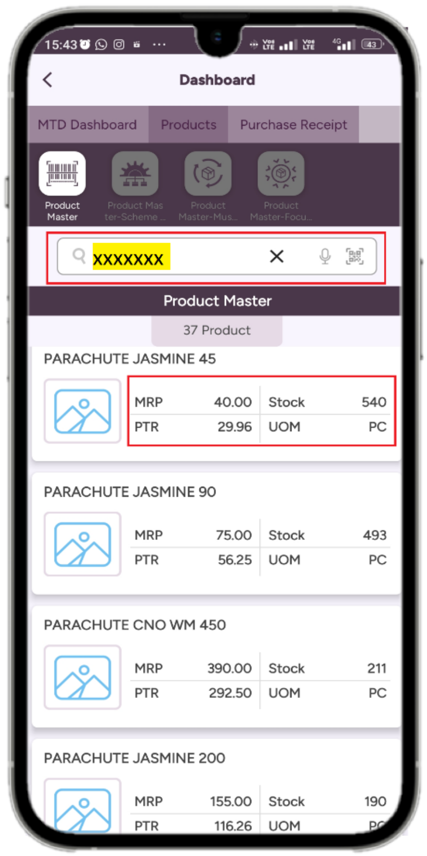
Click **“Product Master”** from the product.

You can see the search bar to search the particular product.

Click “ ” voice search icon to search the product.

You can see the information of product’s stock availability and product to retailer.



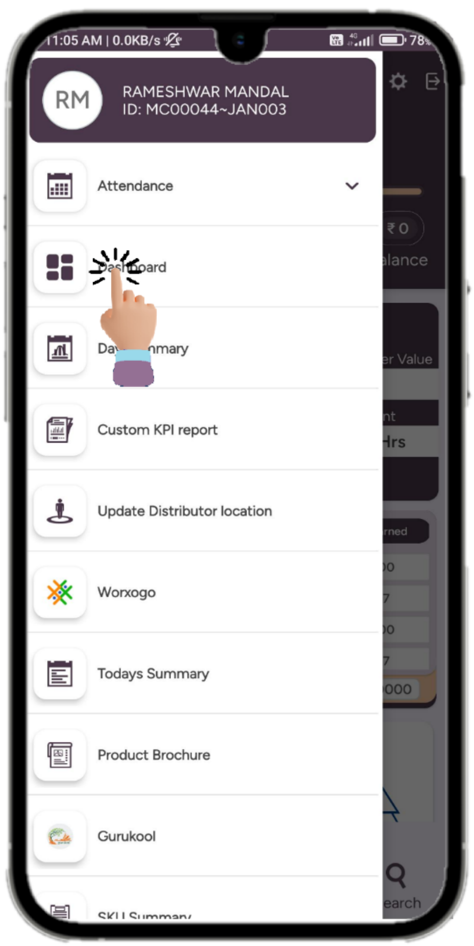


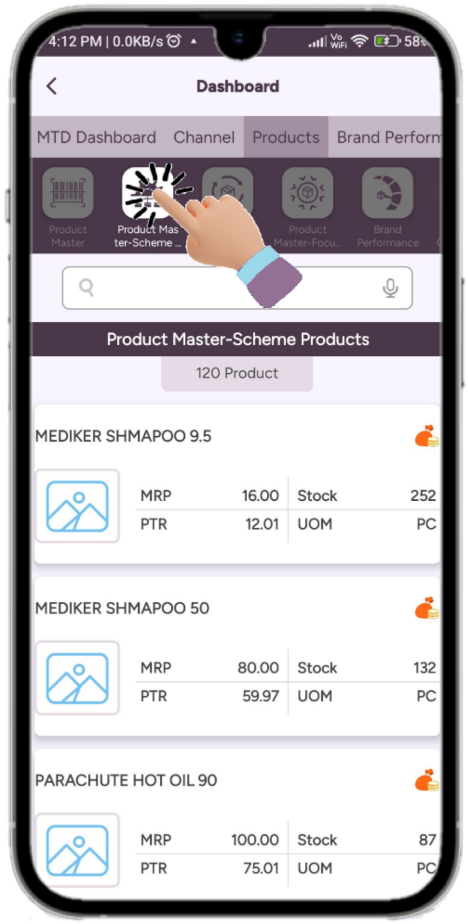
Product Master-Scheme Products

In this feature, the sales person will be able to view the product, which has schemes for the month with details along with the image, UOM, MRP.

Click **“Dashboard”** from the main menu.

Click **“Product”** from the dashboard.





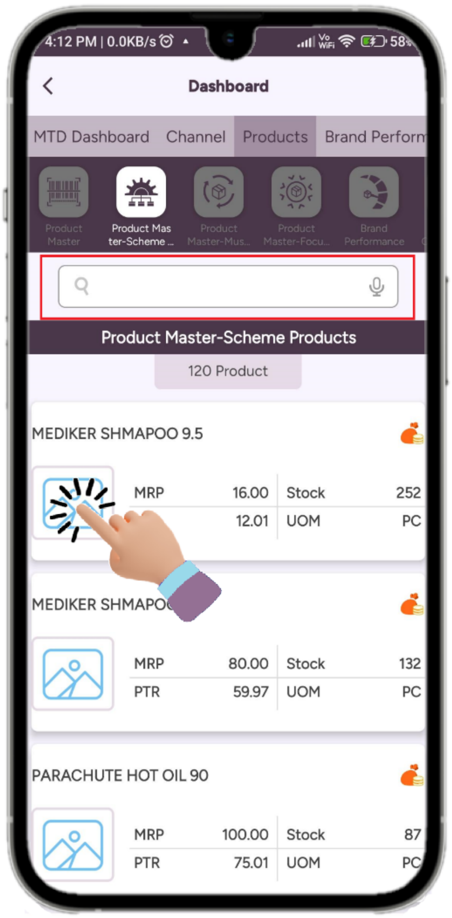
Click **“Product Master Scheme Products”** from the product.

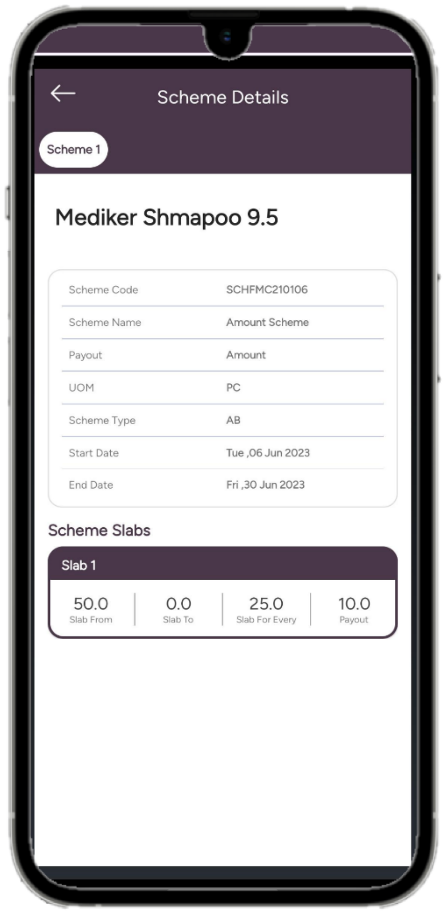
You can see the search bar to search the particular product.

Click “” voice search icon to search the product.

You can see the total products available in count.

Note: By doing the long press complete scheme details will be visible for particular product including the slab information.



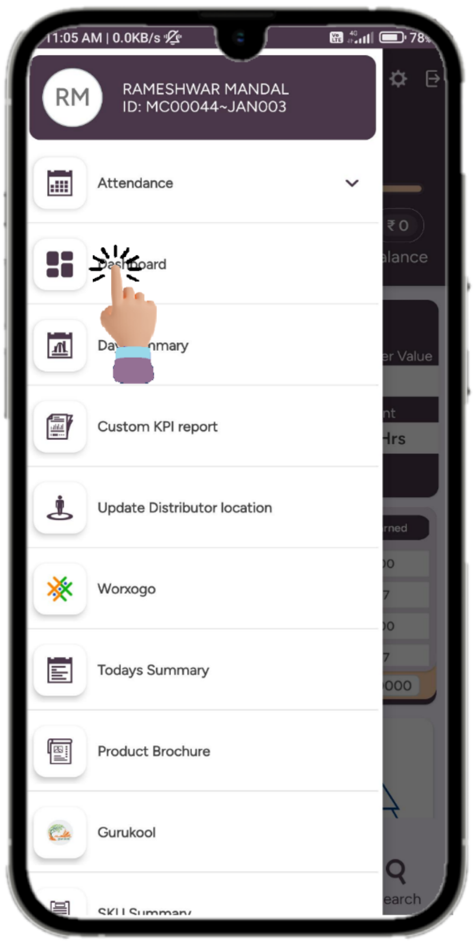


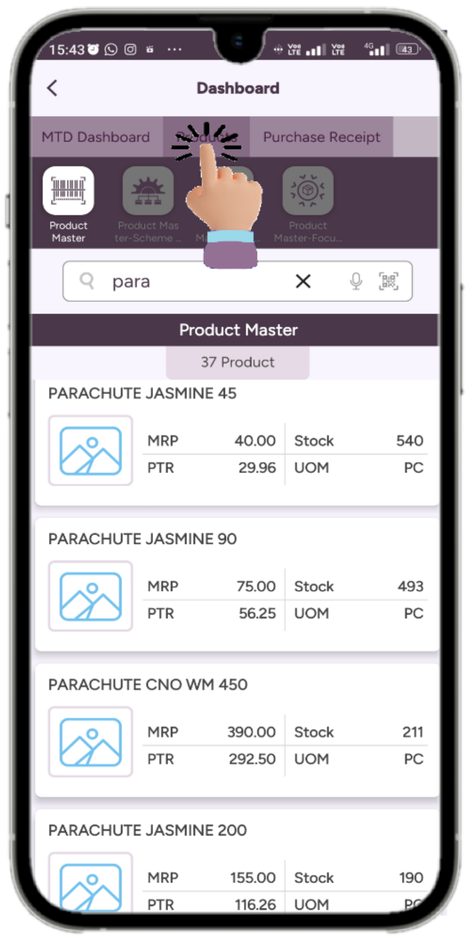
Product Master-Focus Brand

In this feature, the salesperson can be able to view the particular brand product focused for sale, which set by the company and the distributor.

Click **"Dashboard"** from the main menu.

Click **"Product"** from the dashboard.

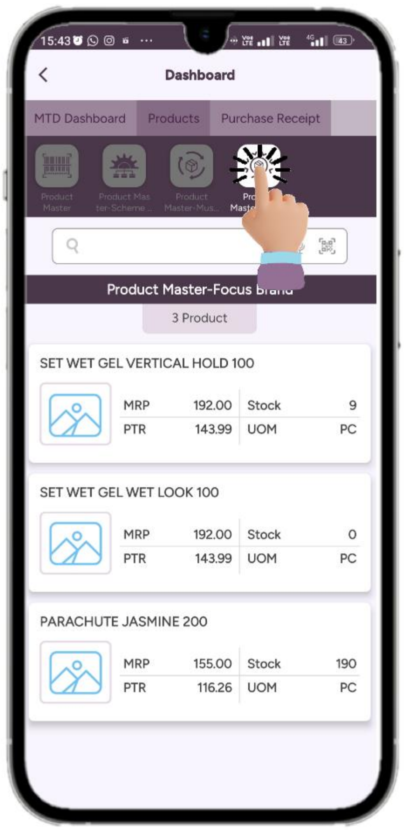


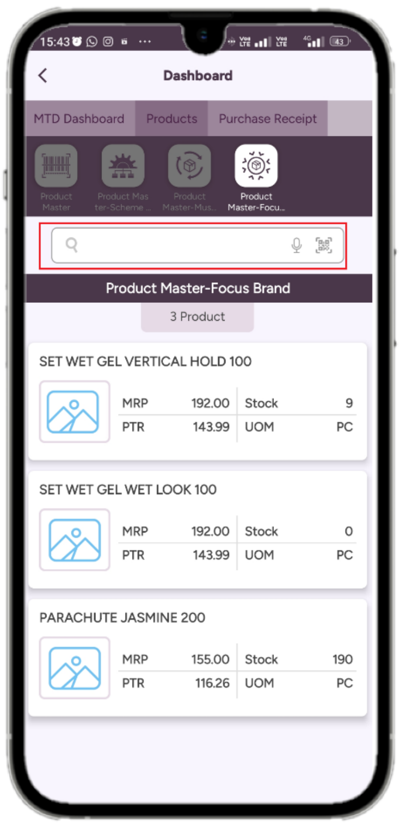


Click **"Product Master-Focus Brand"** from the product.

You can see the search bar to search the particular product.

Click "" voice search icon to search the product.





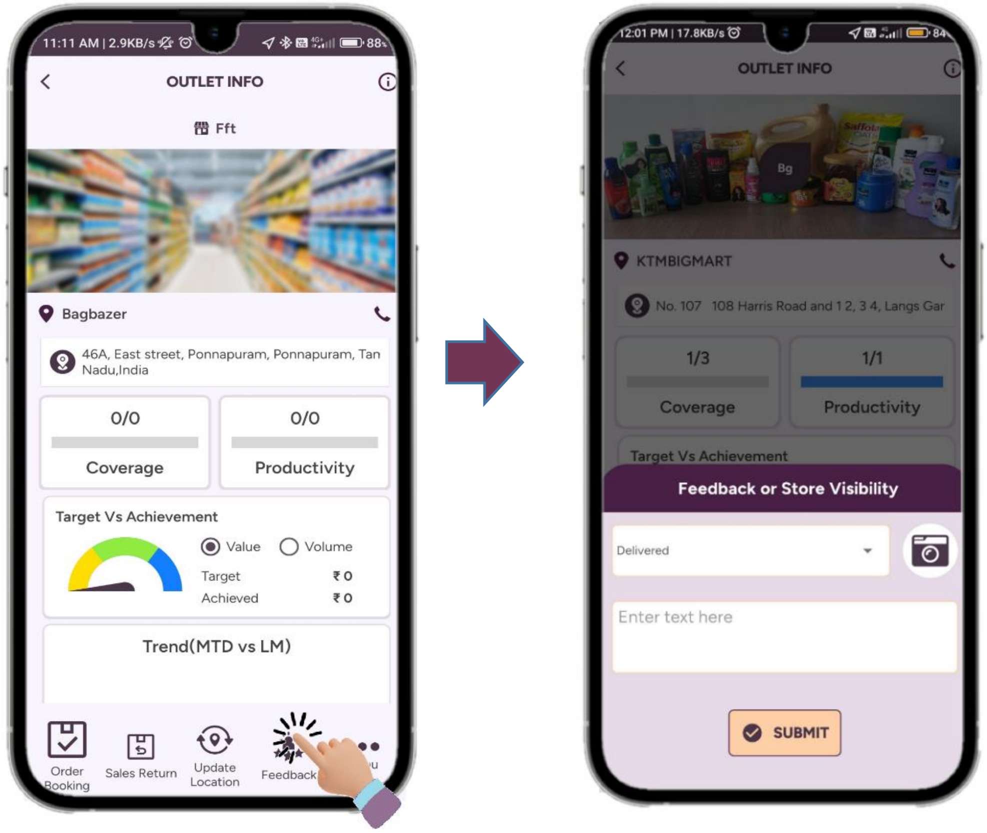
5.12. Feedback or store visibility

MDSR can use this feature to record feedback from a particular outlet along with photograph.

Do follow the steps to complete the process.

Click “ ”icon from the outlet info screen.

Select “ ”icon.



Click the dropdown and select appropriate feedback.

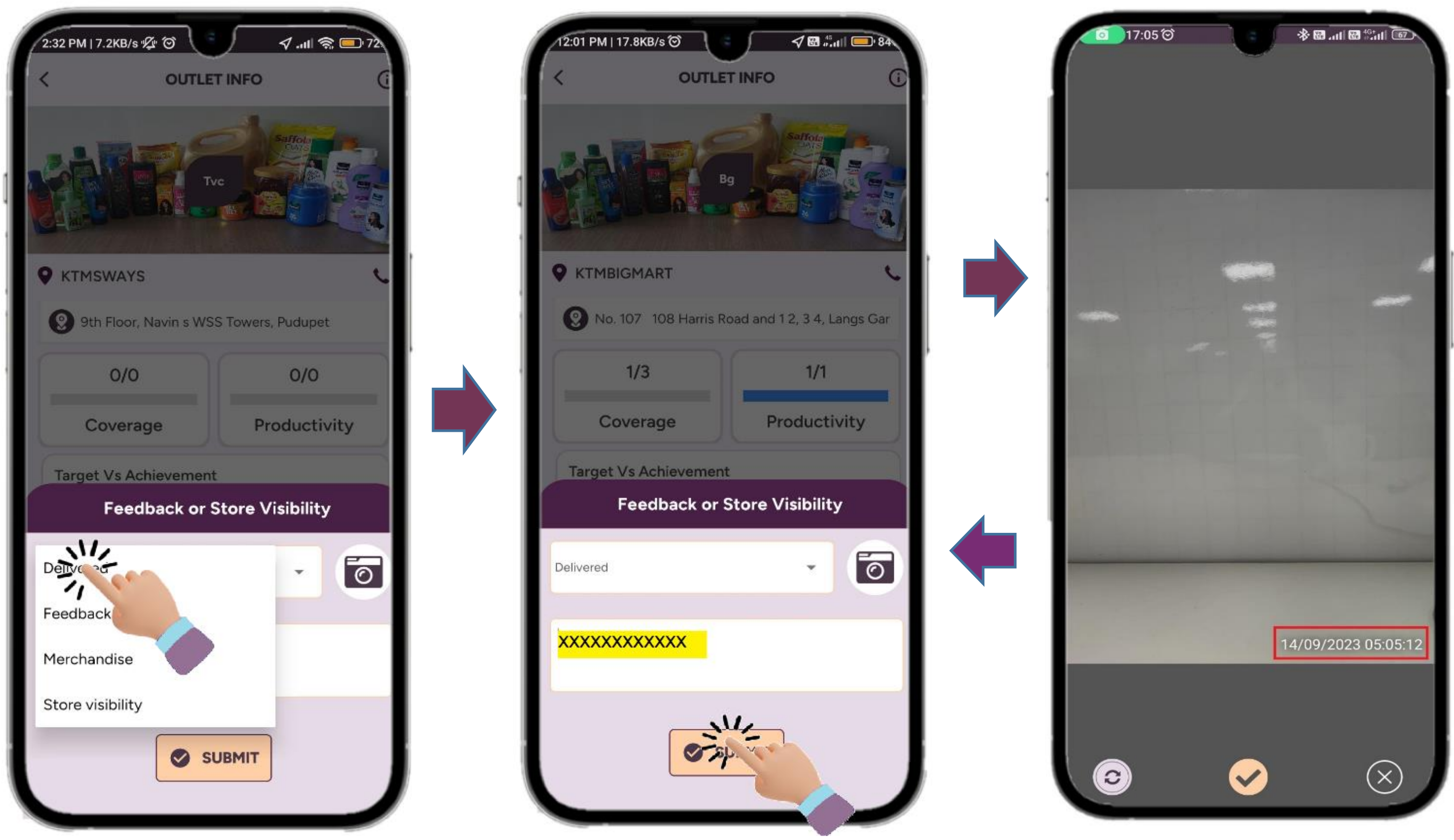
Enter the required text.

Click “”icon to capture the photograph.

Note:

A time and date are automatically embedded in the image when a photo is taken.

Click “**Submit**”.



5.13. Activity tracker

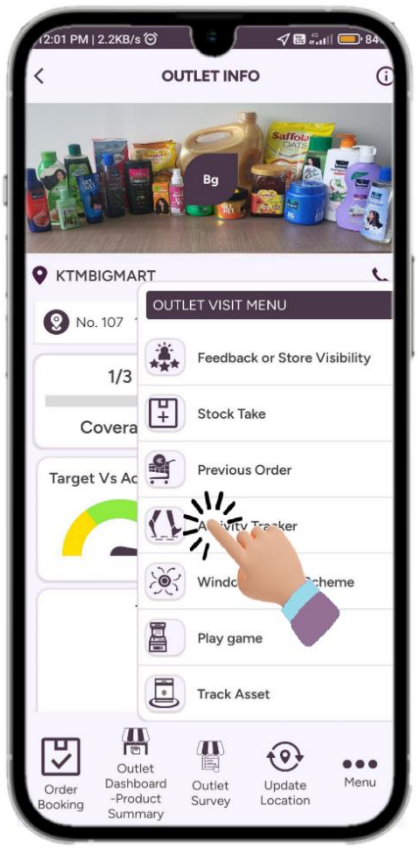
Company or the distributors will set an activity for the MDSR to complete when is on the outlet visit. MDSR must select and submit the answers.

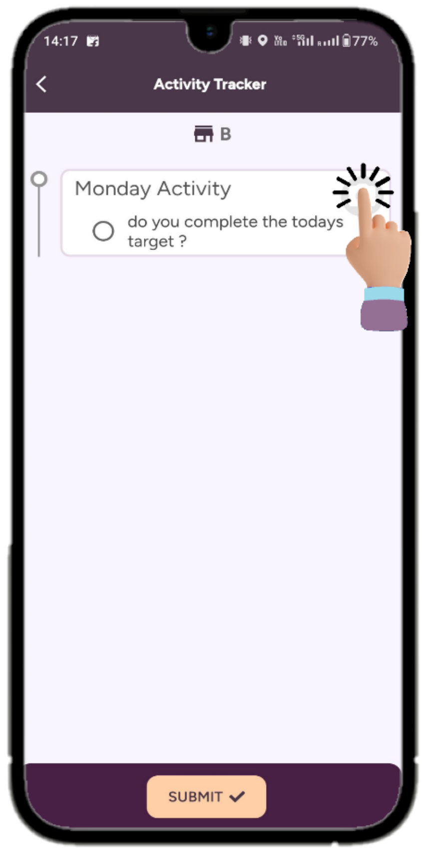
Do follow the below steps to complete the process.

Click “●●● ”icon from the outlet info screen.

Select “ ”icon.

You can see activity tracker screen.

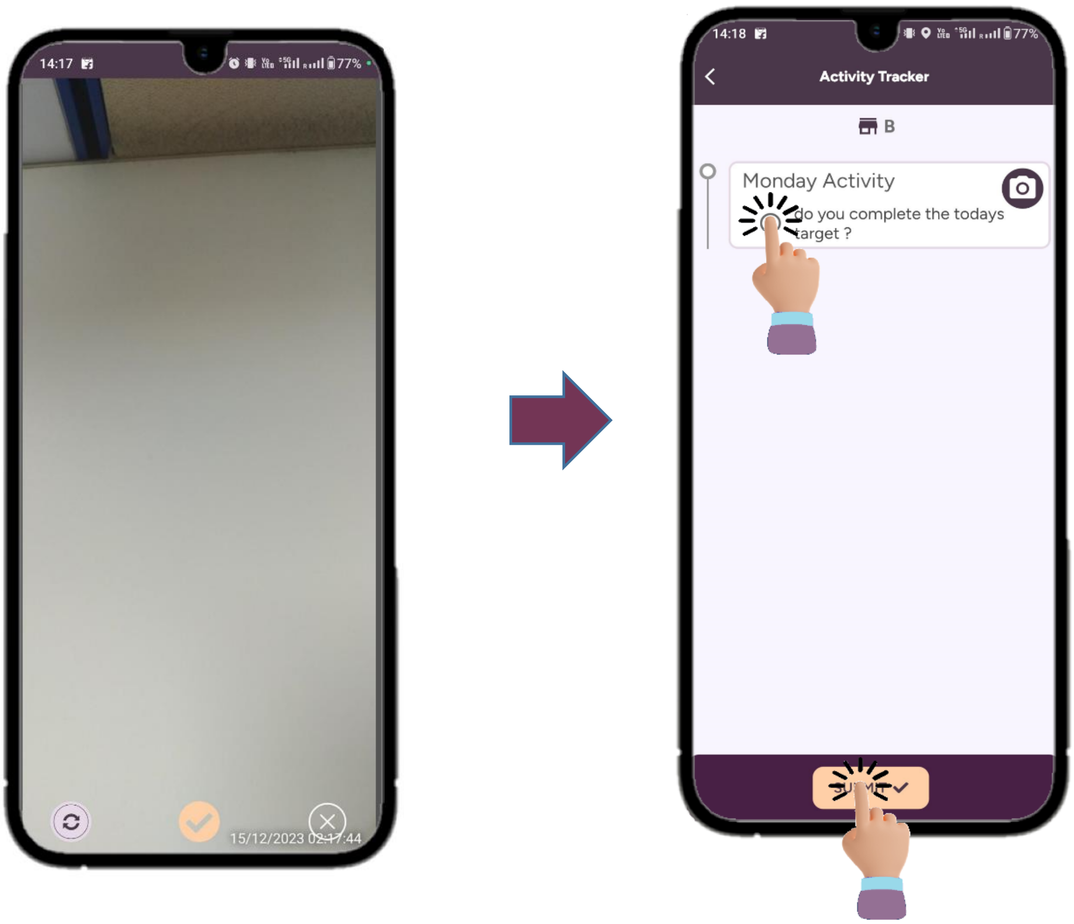




Select appropriate answers for the given questions.

Click the “ ”icon to capture the image.

Click “**Submit**”.



5.14. SKU summary

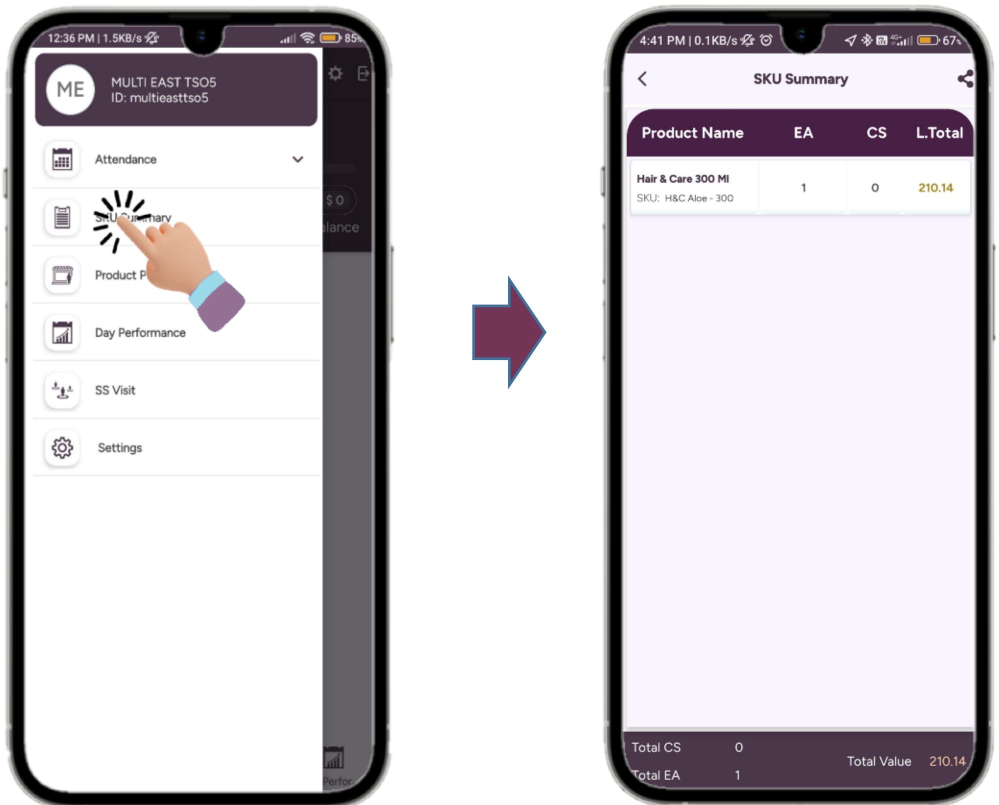
The salesperson can view the list of SKUs for the orders placed on that day in the SKU summary module.

Do follow the below steps to see the SKU summary screen.

Click “ ”icon at the left corner of the home screen.

Click the “ ”icon from menu.

You can see the SKU summary screen.



In the SKU summary screen, user can see the product name, EA, CS and the total value for those products.

Note: This module is only viewable and user cannot edit any information.

5.15. Sales Return

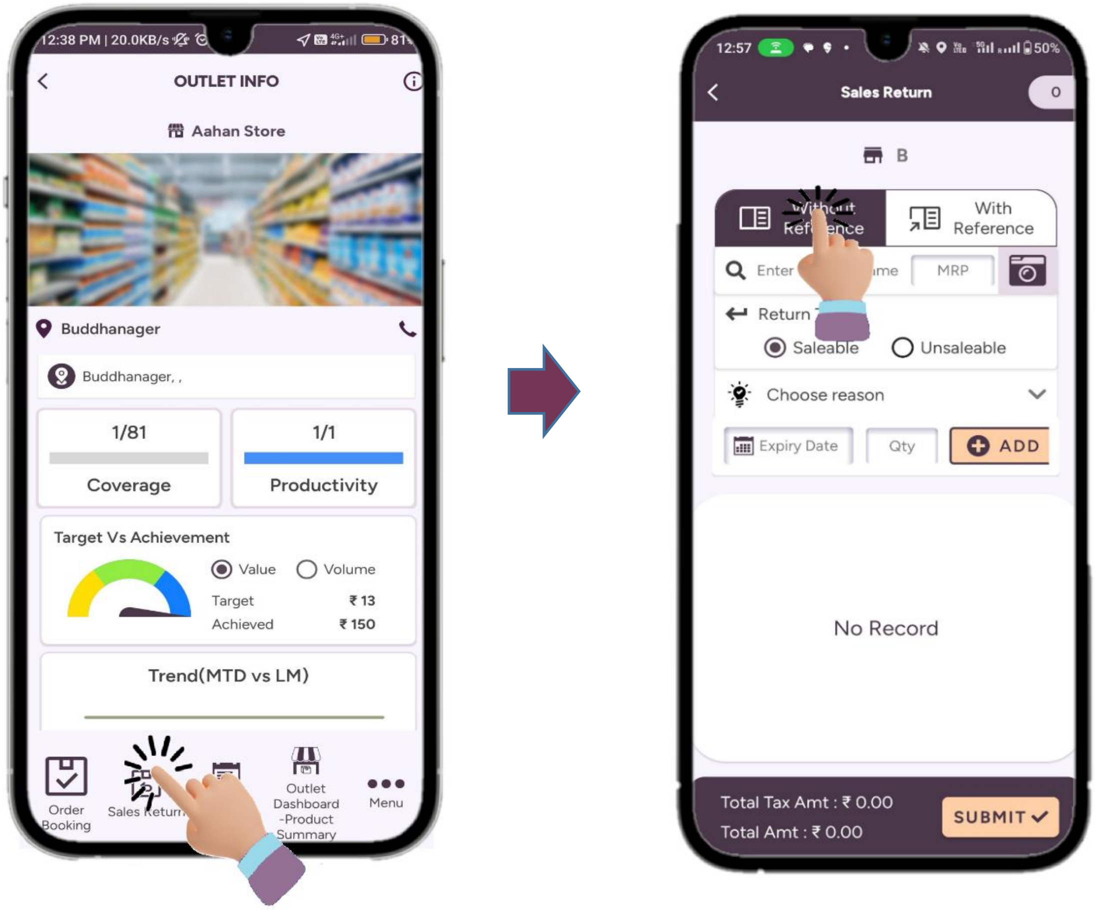
In this feature, the salesperson will be able to take sales return from the market for saleable or unsaleable products predefined reasons along with photographs.

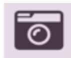
Do follow the steps to perform the sales returns:

1. Click **“Sales Return”** >> You can see the sales return screen on the display.

2. Click “**With Reference**” >> Enter the Invoice number >> Enter the product name >> Enter the Product MRP.

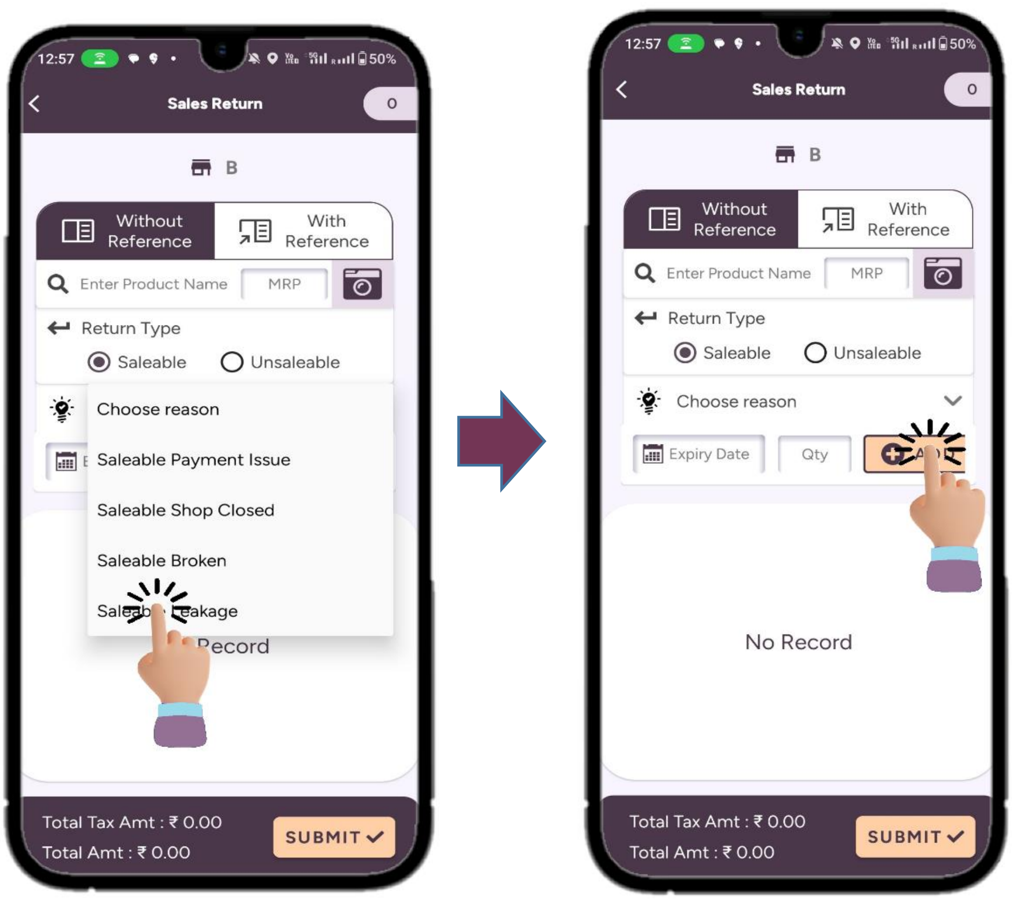
***Note**: If you select “Without Reference”, Invoice no is not required.*



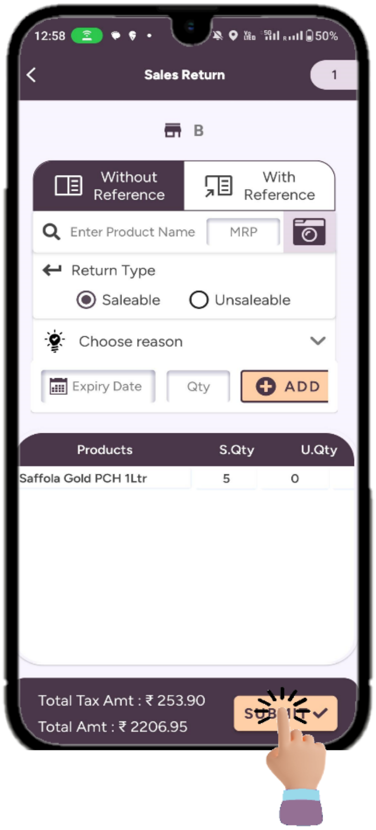
3. Click "" camera icon to capture picture

Note: *A time and date are automatically embedded in the image when a photo is taken.*

4. Select the "**Saleable Type**" >> Click the dropdown and select the reason.
5. Enter the return qty >> Click "**Add**".



6. Check the return products >> Tax value is added in the sales return >> Click "**Submit**"

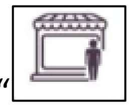


5.16. Product per outlet

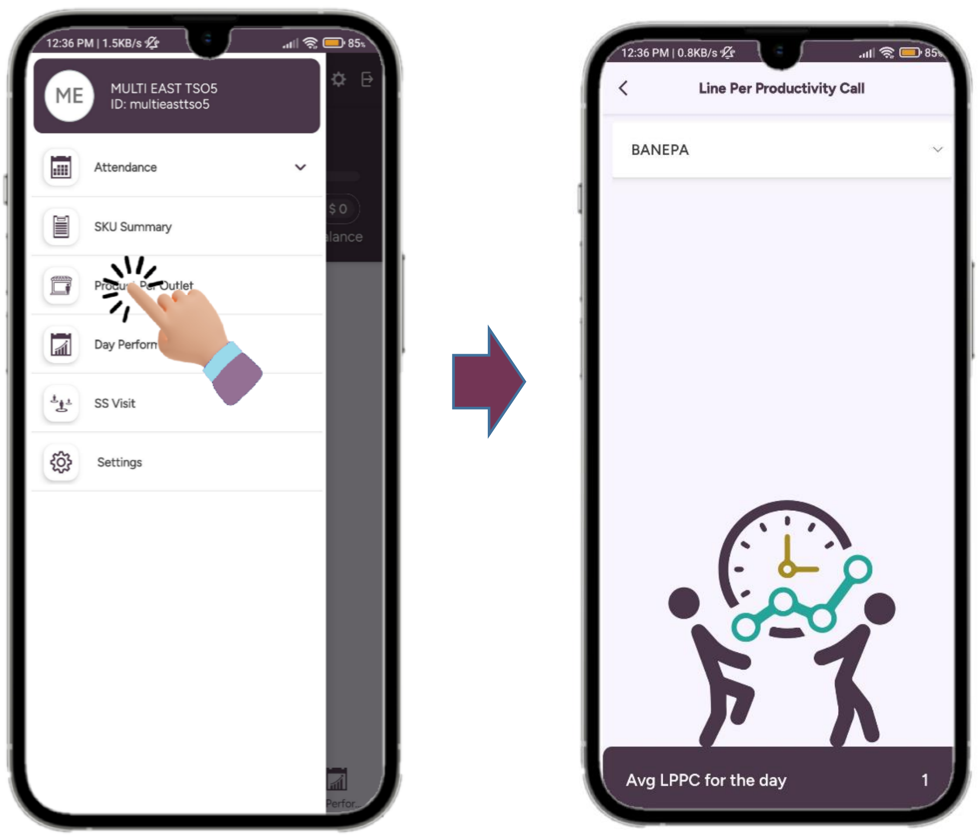
The average of every line items from each outlet for the day is shown as a list in the product per outlet module.

Do follow the below steps to see the product per outlet screen.

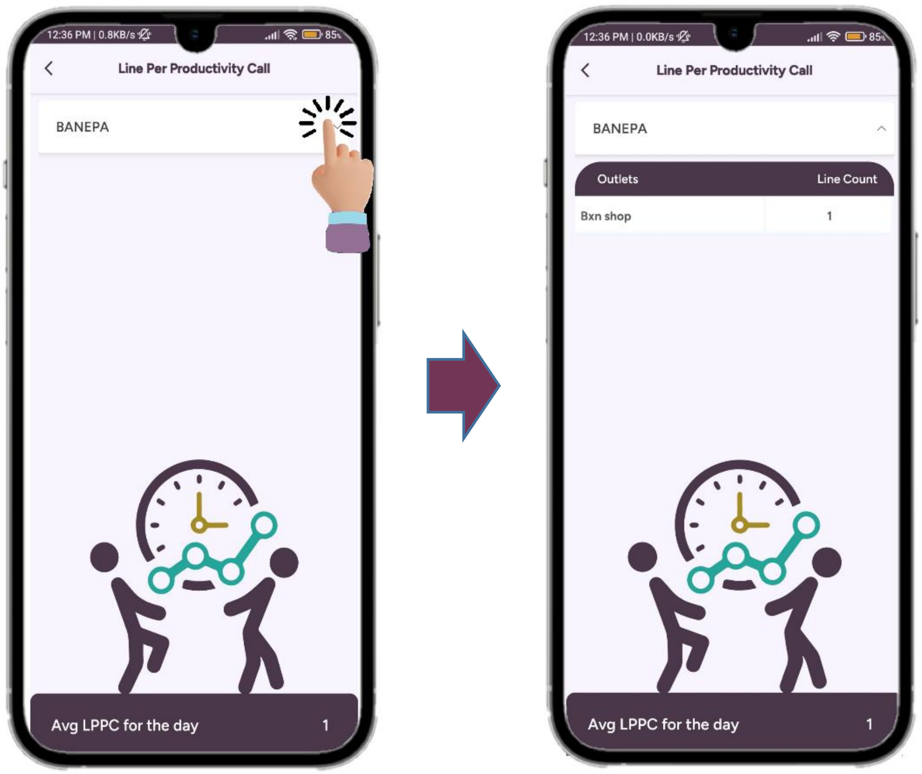
Click “”icon at the left corner of the home screen.

Click “” icon from the menu.

You can see the product per outlet screen.



Click the dropdown and see the outlet name & line count.



5.17. Closing stock

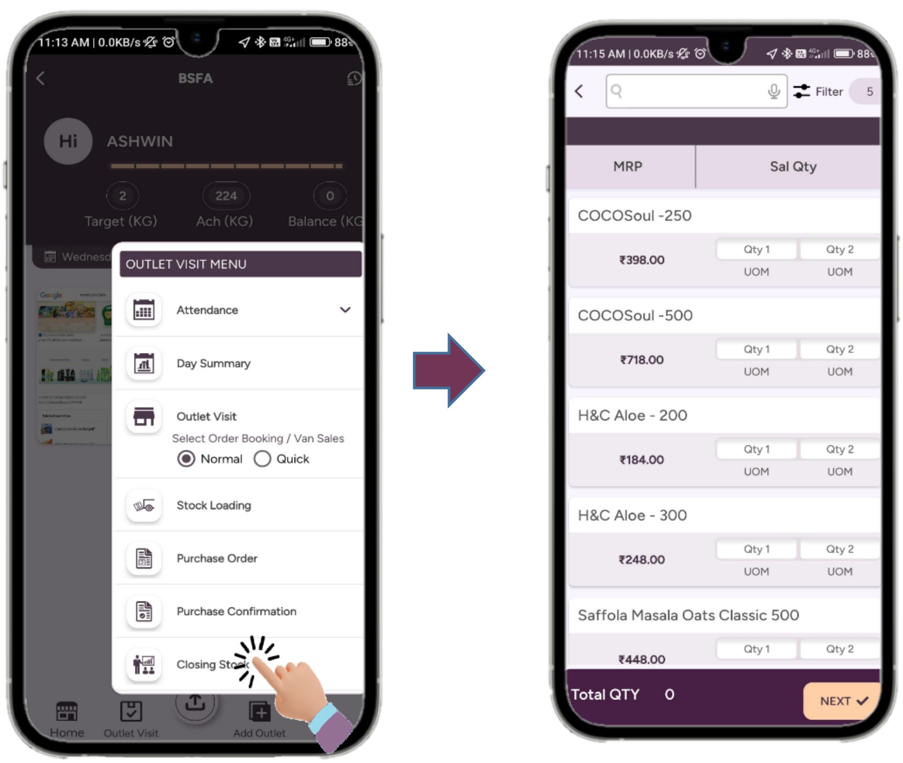
Once the salesperson has completed the market visit, the salesperson must mark the remaining stock in hand in the closing stock module.

Do follow the steps to see the closing stock.

Click "•••" icon.

Select "**Closing stock**" module.

You can see the closing stock screen.



Click on the saleable quantity.

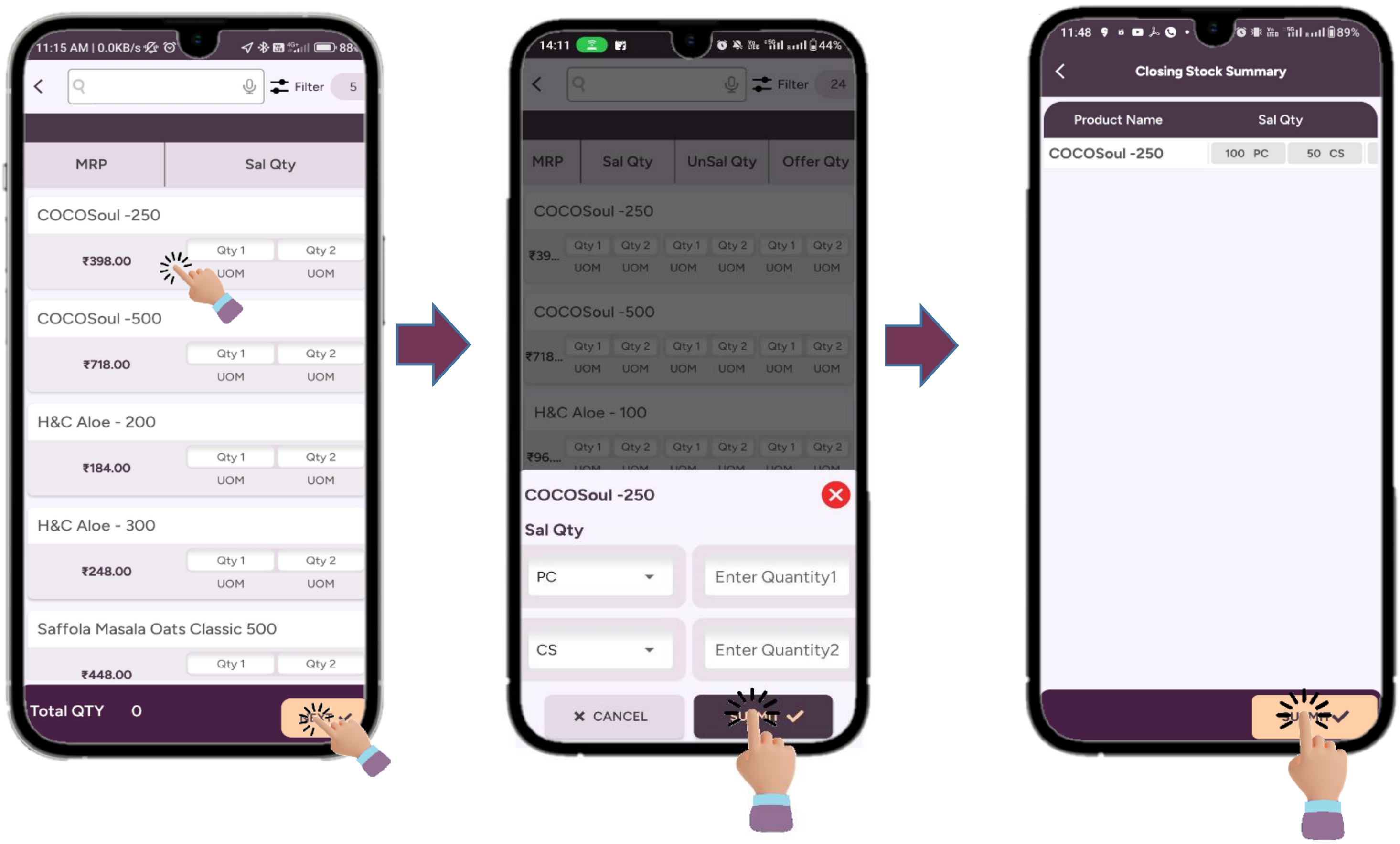
A pop up screen for quantity will appear.

Enter the quantity.

Select the required UOM.

Note: UOM type must not be the same.

Click “**Submit**”.



You can see the closing stock summary.

Click “**Submit**”.

5.18. Opening Stock

The salesperson must update the opening stock module with the existing stock levels before visiting to the market.

Do follow the below steps to see the day summary screen.

Click "•••" icon to modules available.

Select "**Opening Stock**".

You can see the opening stock screen.

Click on the saleable quantity.

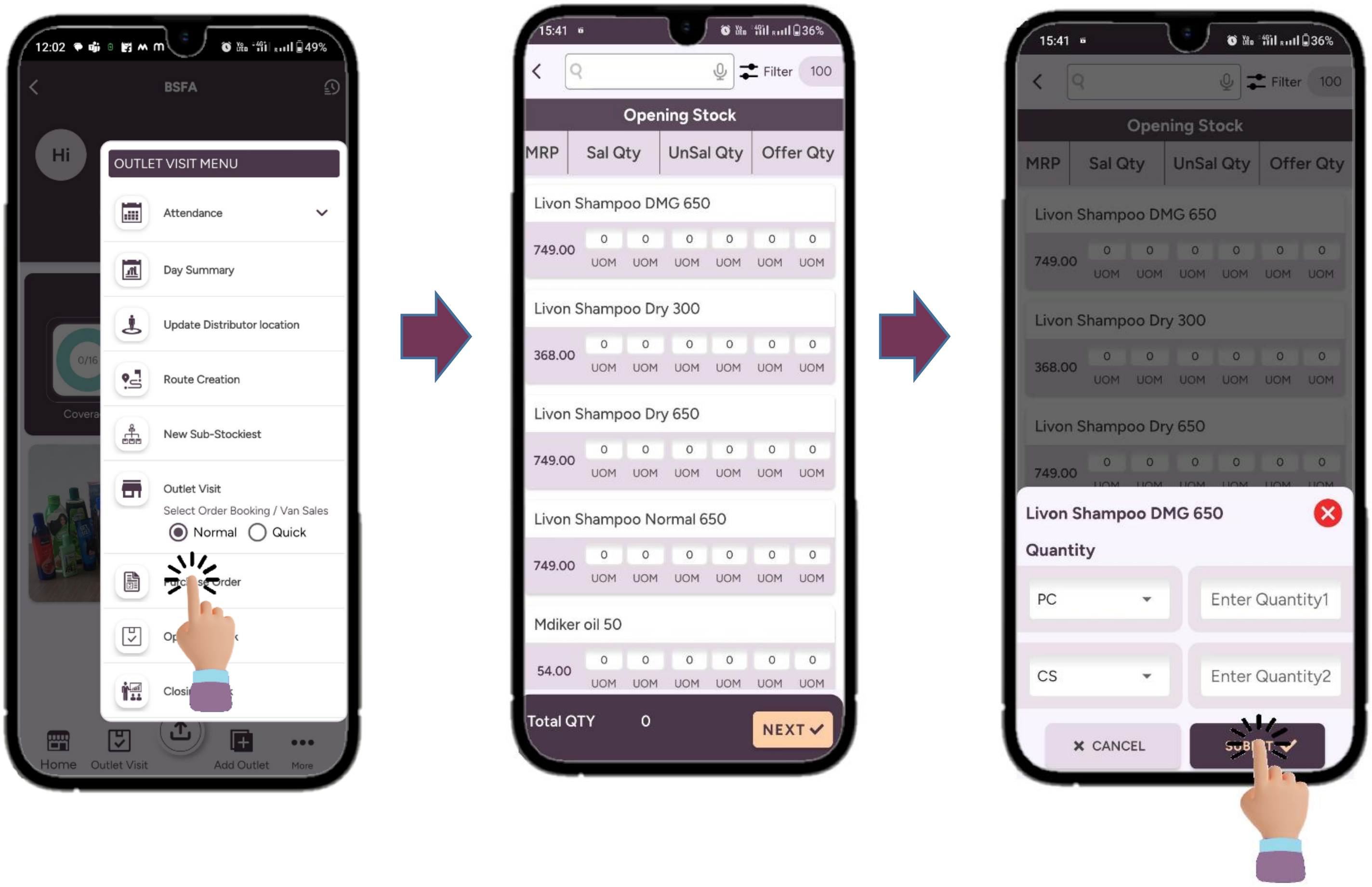
A pop up screen for quantity will appear.

Enter the quantity.

Select UOM either in PC or CS.

Note: UOM type must not be the same.

Click "**Ok**".

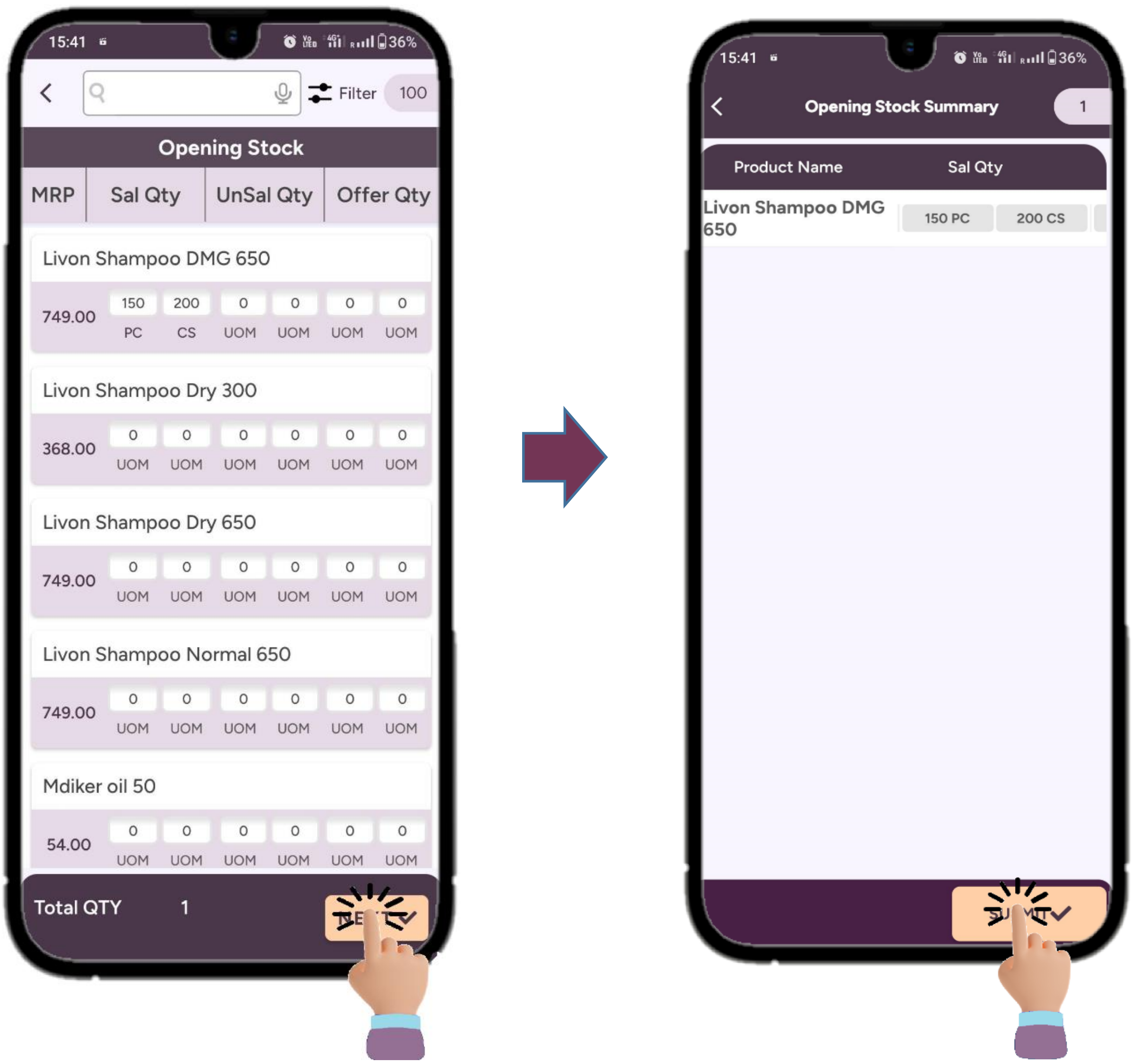


Do the same for the unsaleable and offer quantity as well.

Click “**Next**”.

You can see the closing stock summary.

Click “**Submit**”.



5.19. Day summary

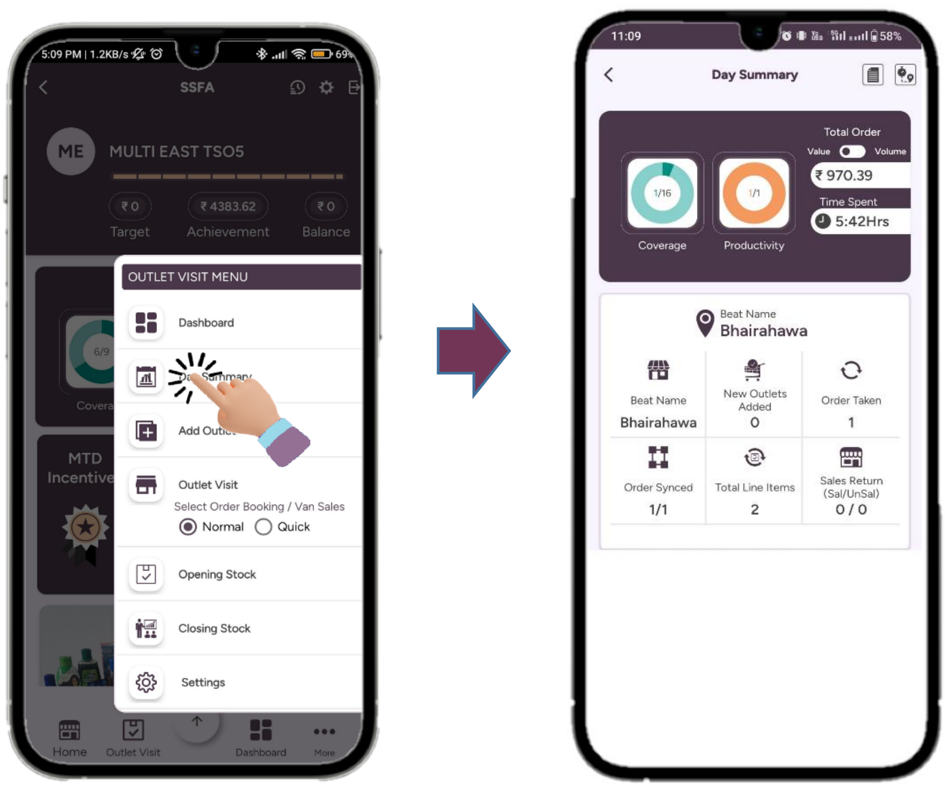
A salesman's total coverage and productivity for the day can be seen in the day summary module.

Do follow the below steps to see the day summary screen.

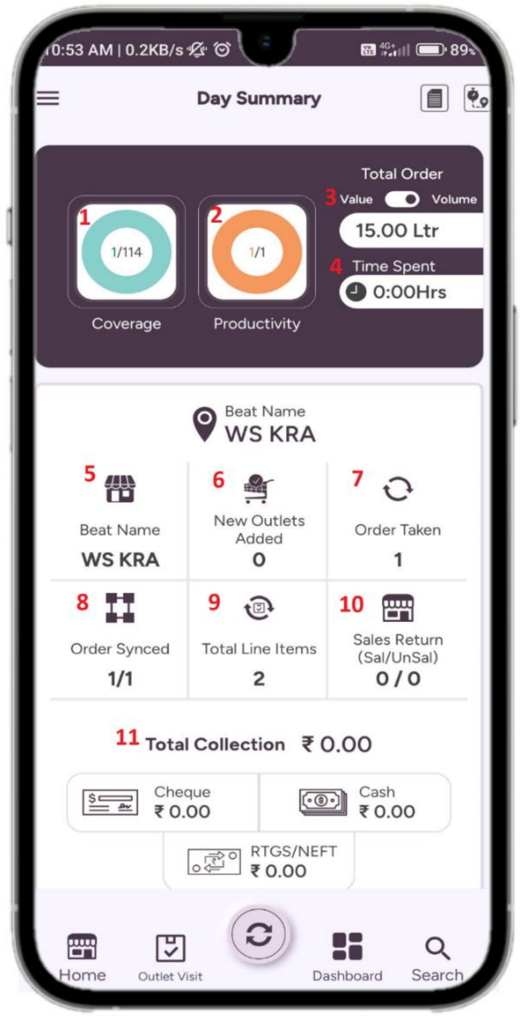
Click "•••" icon to modules available.

Select "**Day summary**".

You can see the day summary screen.



User can see the topics listed below in the day summary screen.



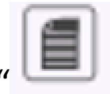
1. **Coverage-** The total no. of. outlets covered for the particular day.
2. **Productivity-** The total productivity covered for the particular day.
3. **Total order value/volume -** The total collection amount for the day. The total order can be viewed in volume measurement as well.
4. **Time spent-** Total amount of time spent in the market by the sales person.
5. **Beat name –** The name of beat is shown**.**
6. **New outlets added –** The no. of new outlets added on the particular day.
7. **Order taken-** Total number of orders taken on the whole day.
8. **Order synced-** Total no. of. outlets synced after the outlet billed or unbilled.
9. **Total line items-** The total no of items ordered on the particular day.
10. **Sales return-** Total no. of. return items that are either saleable or unsaleable.
11. **Total collection**- Total collection amount for the day.

12.**Cheque** – Total amount paid in form of cheque.

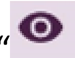
13.**Cash**- Total amount paid in form of cash.

14. RTGS/NEFT – The amount received through RTGS or NEFT.

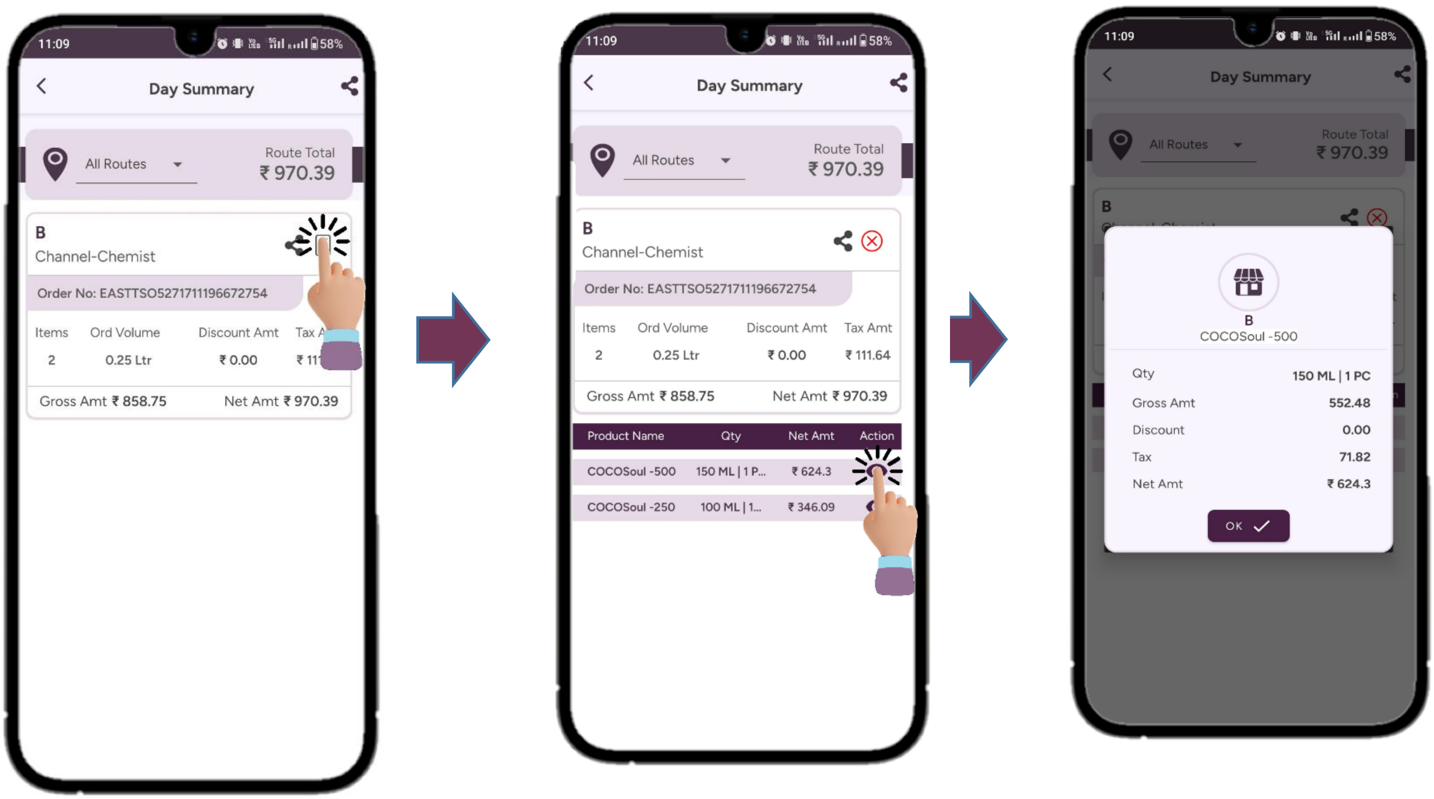
To view the day summary details for specific store,

Click “”icon to see the day summary details screen.

You can see the order details below.

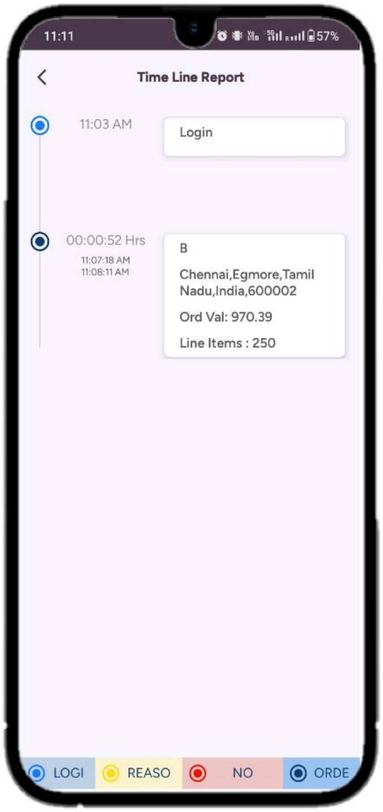
Click on the “”icon to see the product details.

Click “**Ok**” to close the pop-up.



To see the timeline of day summary,

Click “  ”icon to see the timeline of day summary.


11:11
57%
Time Line Report
11:03 AM
Login
00:00:52 Hrs
11:07:18 AM
11:08:11 AM
B
Chennai,Egmore,Tamil Nadu,India,600002
Ord Val: 970.39
Line Items : 250
LOGI
REASO
NO
ORDE

5.20. Day performance

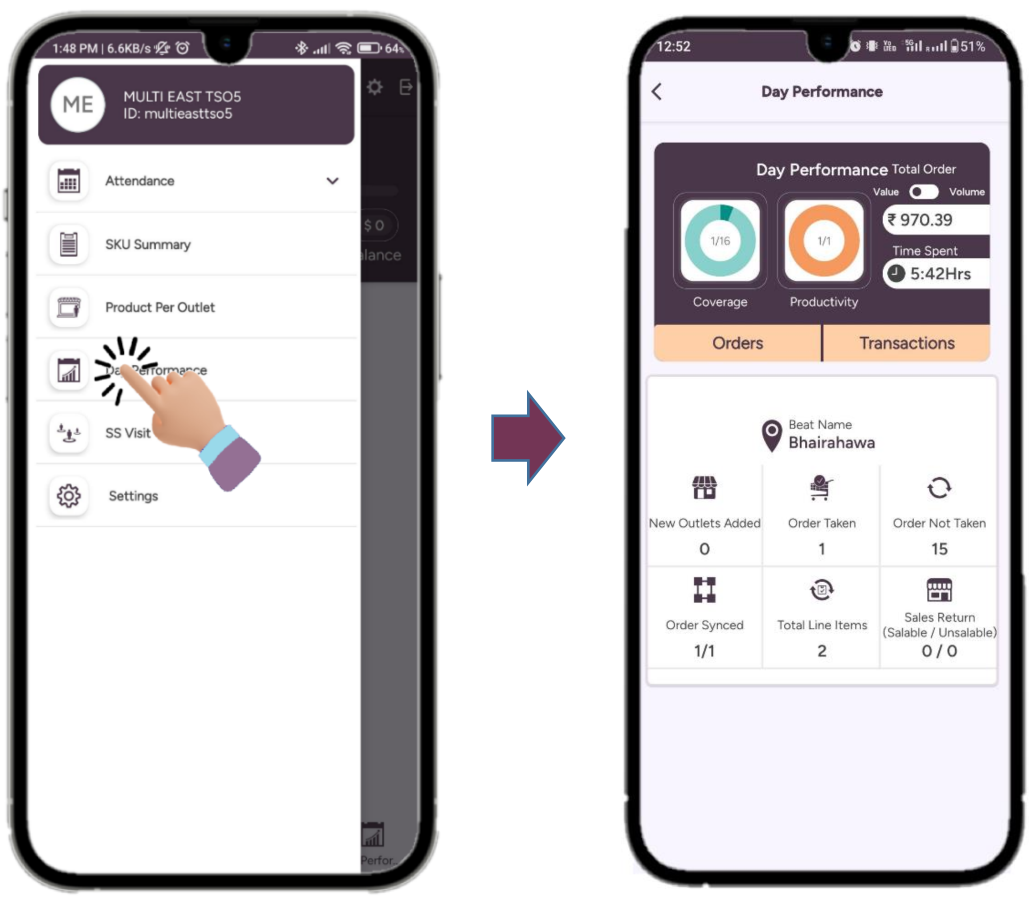
In the day performance module, the user can see the whole day performance with the total order value, orders, transactions, coverage and productivity.

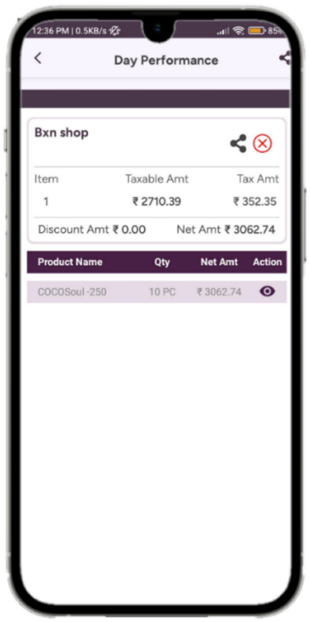
Do follow the below steps to see the day performance.

Click "" icon at the left corner of the home screen.

Click "" icon from menu.

You can see the day performance screen.





User can see the orders and transactions in a separate modules.

To view the orders,

Click “**Orders**”.

You can see the orders screen.

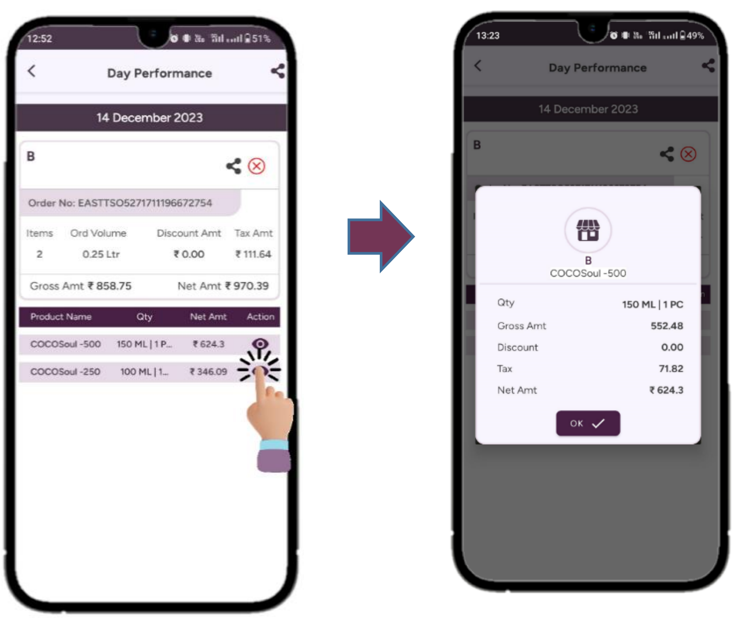
To view order details in a detailed way,

Click “ ” icon to see the order information

Click “ ” icon to share the particular orders details.

Click “ ” icon to see the product information.

You can see a pop-up with the complete product information.

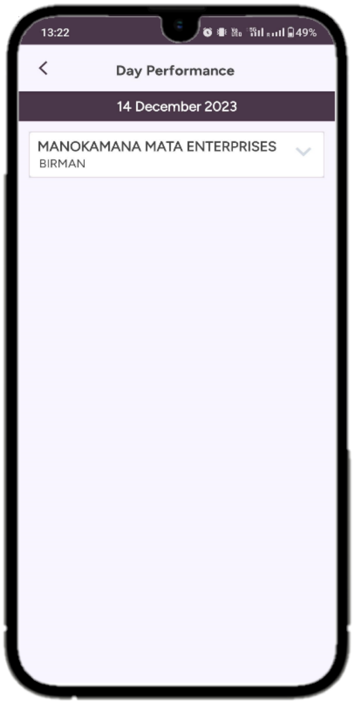


To view the transactions,

Click “**Transactions**”.

You can see the transaction screen.

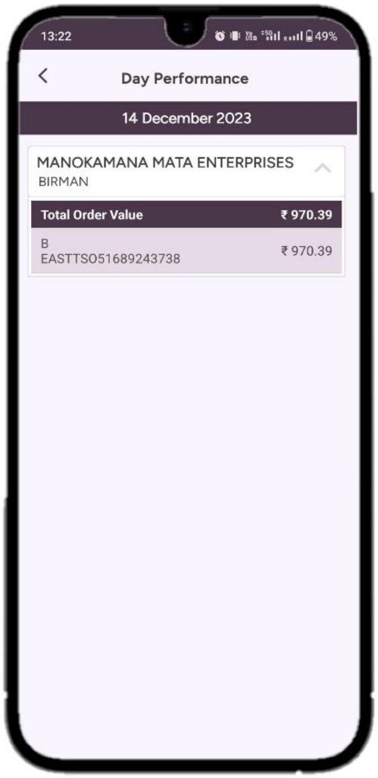
The transaction made by the retailers can be seen in list view.



To know the particular transaction,

Tap on the Retailer name.

You can see the total order value made from the particular retailer.

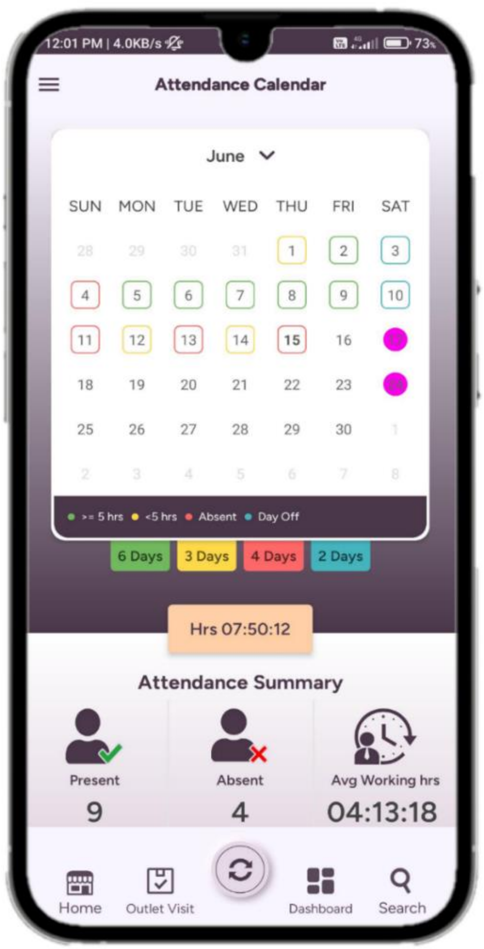


5.21 Attendance Calendar

User can see the colour code mentioned in this module to see present days, absent days, working more than 5 hrs or less than 5 hrs in the attendance calendar.

Do follow the below steps to view attendance calendar.

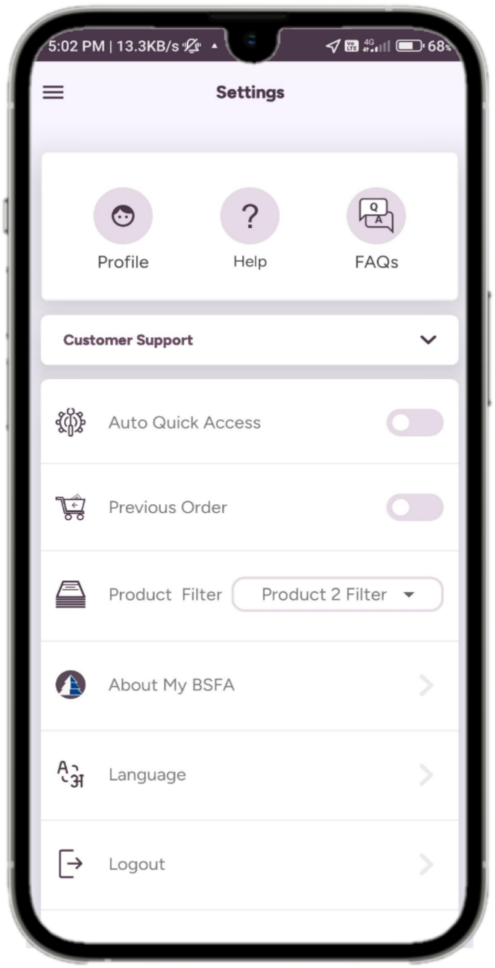
1. Click "" menu icon >> Click the dropdown and select "**Attendance calendar**".
2. You can see the attendance calendar screen.

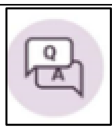
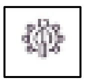
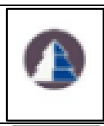
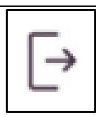


Color	Remarks
Green	More than 5 hours
Yellow	Less than 5 hours
Red	Absent
Blue	Day off

5.22. Settings

The application's features can be customized by the user via the settings. Additionally, the sales representative can set the product filters according to the merchants using the drop-down menu.



OPTIONS	USES
	User can use this feature to get help either mail support or toll free call.
	User can use FAQ section to know about frequent questions and steps provided to resolve
Customer Support	User can contact the customer support team for any query using the toll free number provi under the customer support.
	User can turn on the toggle button to use the quick access.
	In this feature user can see an overview about the BSFA application.
	User can use this feature to change the language in the application.
	User can logout from the application by the usage of this feature.
Version 7.1.0	User can find the current version of the application.
Privacy Policy	User can use this feature to know about the privacy policy of the company.