Pharma HRM + Accounts System - Complete Use Cases

Organizational Management

1. Company & Structure Management

- [/] Create/Edit/Delete organizations and subsidiaries
- [ ] Define organizational hierarchy (Branches → Departments → Teams)
- [ ] Manage organizational units and reporting lines
- [ ] Assign managers and supervisors to units

2. Employee Lifecycle Management

- [ ] Employee onboarding with document management
- [ ] Position and role assignment across organization
- [ ] Employee transfers between departments/units
- [ ] Promotion and demotion workflows
- [ ] Offboarding and exit management

💰 Accounting & Financial Management

3. Chart of Accounts Management

- [/] Create/maintain account hierarchy
- [/] Define account types (Asset, Liability, Equity, Revenue, Expense)
- [/] Set up department/project-specific accounts
- [ ] Account activation/deactivation

4. Journal Entry Management

- [/] Create manual journal entries with debit/credit validation
- [ ] Draft, review, and post entries
- [ ] Void/reverse incorrect entries
- [ ] Attach supporting documents
- [ ] Assign entries to cost centers/departments

5. Financial Reporting

- [/] Generate real-time Trial Balance
- [/] Produce Balance Sheets (Assets = Liabilities + Equity)
- [/] Create Income Statements (Revenue - Expenses)
- [ ] Departmental P&L reports
- [ ] Budget vs Actual comparisons
- [ ] Export reports to PDF/Excel

Human Resources Management

6. Employee Master Data

- [ ] Comprehensive employee profiles
- [ ] Employment history tracking
- [ ] Qualification and certification management
- [ ] Emergency contact information
- [ ] Document repository (contracts, certificates)

7. Attendance & Leave Management

- [ ] Daily attendance tracking
- [ ] Leave request and approval workflows
- [ ] Leave balance management
- [ ] Overtime calculation and approval
- [ ] Attendance regularization requests

8. Payroll Processing

- [ ] Salary structure management
- [ ] Payroll calculation with deductions
- [ ] Bonus and incentive management
- [ ] Loan and advance processing
- [ ] Payslip generation and distribution
- [ ] Bank transfer processing

9. Performance Management

- [ ] Goal setting and tracking
- [ ] Performance appraisal cycles
- [ ] KPI and metric tracking

- [ ] Training and development planning
- [ ] Career progression tracking

🏭 Pharma-Specific Operations

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10. Production Management

- [ ] Batch production recording
- [ ] Raw material consumption tracking
- [ ] Quality control test results
- [ ] Production yield calculations
- [ ] Equipment maintenance scheduling

11. Inventory Management

- [ ] Raw material inventory tracking
- [ ] Finished goods stock management
- [ ] Batch and expiry date tracking
- [ ] Stock movement transactions
- [ ] Inventory valuation reports
- [ ] Reorder level alerts

12. Quality Control

- [ ] Quality test specifications
- [ ] Test result recording
- [ ] Compliance documentation
- [ ] Audit preparation and management
- [ ] CAPA (Corrective and Preventive Actions)

📊 Sales & Distribution

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13. Customer Management

- [ ] Customer master data
- [ ] Credit limit management
- [ ] Sales territory assignment
- [ ] Customer transaction history

14. Order Processing

- [ ] Sales order entry
- [ ] Order status tracking
- [ ] Delivery scheduling
- [ ] Invoice generation
- [ ] Sales return processing

15. Accounts Receivable

- [ ] Customer invoice management
- [ ] Payment receipt processing
- [ ] Ageing analysis reports
- [ ] Credit control actions

📦 Procurement & Payables

16. Vendor Management

- [ ] Supplier registration and approval
- [ ] Vendor performance evaluation
- [ ] Contract management
- [ ] Payment term management

17. Purchase Management

- [ ] Purchase requisition workflows
- [ ] Purchase order generation
- [ ] Goods receipt processing
- [ ] Quality inspection recording

18. Accounts Payable

- [ ] Bill entry and verification
- [ ] Payment processing
- [ ] Vendor ageing reports
- [ ] Payment schedule management

System Administration

19. User & Access Management

- [ ] Role-based access control
- [ ] User authentication and authorization
- [ ] Password policy enforcement
- [ ] Session management

20. Audit & Compliance

- [ ] Transaction audit trails
- [ ] User activity logging
- [ ] Data change history
- [ ] Compliance reporting

21. Data Management

- [ ] Backup and recovery procedures
- [ ] Data export/import utilities
- [ ] Archive and purge processes
- [ ] Data validation rules

📈 Analytics & Dashboard

22. Executive Dashboard

- [ ] Key performance indicators
- [ ] Financial health metrics
- [ ] Operational efficiency metrics
- [ ] Customizable dashboard views

23. Advanced Reporting

- [ ] Ad-hoc report builder
- [ ] Scheduled report generation
- [ ] Data visualization tools
- [ ] Trend analysis capabilities

Integration Points

24. System Integrations

- [ ] Bank integration for payments
- [ ] Tax authority integration
- [ ] ERP system integration
- [ ] Mobile app synchronization
- [ ] Email and notification system