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1 Purpose

This document presents a functional description of the **Inception CRM system**. The purpose of this document is to formulate a template for a Functional Specification / Design Specification, or Solution Design and Installation Specification, for a customer project based on the implementation of the **Inception CRM system**.

2 Scope

- Solution Design Overview
 - Interfaces
 - Client Applications
 - System Architecture
 - Data Model and Data Flow
 - Data Stored on Client Applications
 - Security Characteristics
 - User Authentication and Access
 - Authorization Model
 - User Account Administration
 - Access and Password Management
 - Environment Management
- Technical Architecture
 - Hardware Inventory, Specifications and Locations
- Configuration Specification
 - Application Parameters and Settings – all modules
 - Client applications and interfaces
 - User roles and permissions
- Solution Design Specification
 - Software Description
 - Business Applications
 - Main System Interfaces
 - Coding Standards
 - Solution Data, Information View, and Data Requirements
 - Module Description

2.1 Exclusions, Assumptions, and Limitations

The Inception platform is a vendor-hosted solution. Management of all system and infrastructure parameters, including parameters for the set up and configuration of software and interfaces, parameters for ensuring logical and physical security of servers, networks, ports, databases and other critical components, and parameters for the configuration of all Inception's services, are managed by the vendor.

Information relating to features and components exclusively within the scope of the vendor's responsibility are not documented or detailed in this document.

3 Solution Design Overview

3.1 System Description

The Inception CRM system is customer relationship management software solution that serves the planning, reporting, and analytic needs of field sales employees and their managers.

The following sections provide a high-level overview of the business solution for the Inception landscape.

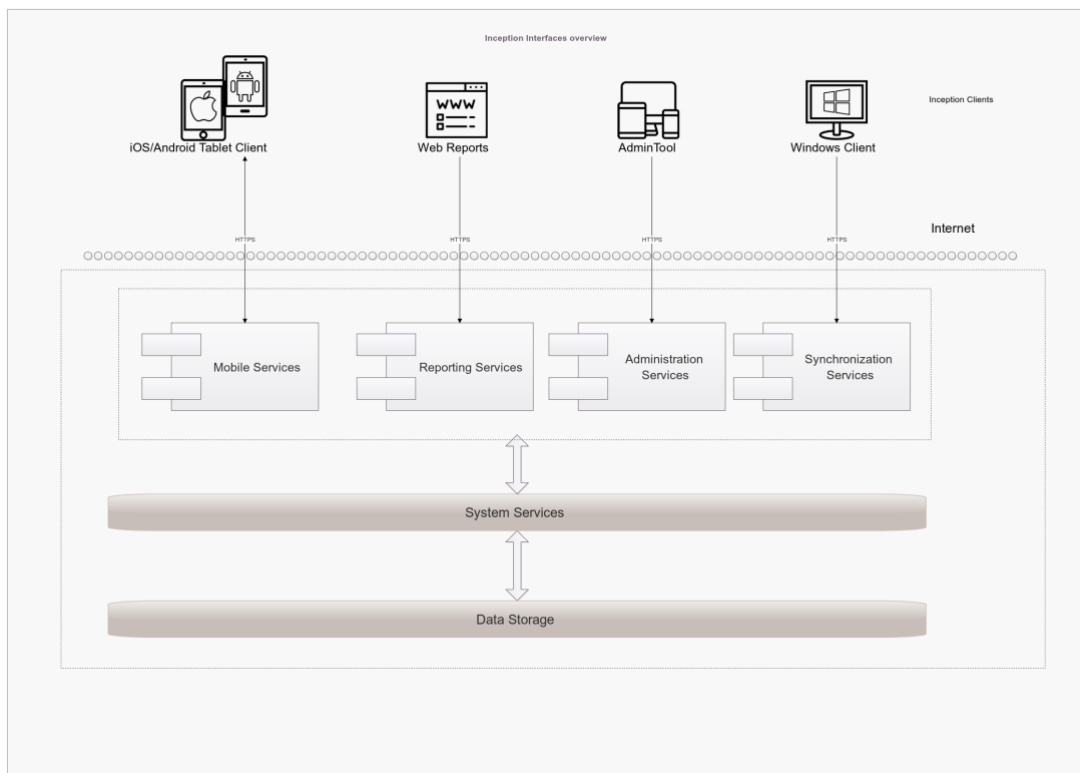
3.1.1 Interfaces

The Inception CRM system supports a variety of interfaces that connect Inception's system services to Inception client applications and 3rd-party services through public internet.

The interfaces in scope of the [Customer] project and this functional description are the following Inception client-to-service interfaces:

1. Mobile Services Interface – Tablet Client (iOS / Android native applications)
2. Reporting Services Interface – Web Client (Web Reports)
3. Administration Services Interface – Smart Client (AdminTool)
4. Synchronization Services Interface – Windows Client

3rd-party interfaces are out of scope of this functional description. The interfaces in scope are illustrated by the simplified system architecture diagram below:



3.1.2 Inception Client Applications

The Inception system comprises the following client applications:

- Tablet Client
- Windows Client
- Web Reports
- AdminTool

These applications serve the needs of various types of end users: sales representatives, FF managers, and local system administrators.

The applications in scope of this document are:

- Tablet Client (“iPad Client”)
- Windows Client – **scope to be defined**
- Web Reports – **scope to be defined**

3.1.2.1 Tablet Client

The iOS native application, used by Sales Representatives, runs locally on their tablet devices (iPad) and communicates data through synchronization with the central server, located in Prague, Czech Republic. Reps use this application to perform the following tasks in scope for [Customer] [Country]:

Example Scope:

- a. Search the Customer Database
- b. View Customer Information, including contact information, contact history, profiles, and locations
- c. Update Customer Information (Data Change Requests)
- d. View Cycle Plans and Target Customer Lists
- e. Plan Calls (Agenda Planning)
- f. Execute and Record Calls (Call Reporting)
- g. Plan / Execute all other activity types, both In-Field and Out-Field, Working and Non-Working
- h. View the Calendar
- i. View Dashboards (KPIs presenting results and feedback on current status)
- j. Present or otherwise utilize marketing content (media)
- k. Present CLM content (media)
- l. Record costs/expenses related to their activities
- m. Record samples and promotional items distributed to customers
- n. Create and send pharmacy orders
- o. Other tasks, as defined

The iOS application is designed to function with a live internet connection, but can also be used offline, to a limited degree, in case of need. In such cases, users can back up their current status via synchronization.

The switch to offline mode can be performed manually by the user, or automatically in case of connection failure. Synchronization is used to pair the data on the iPad with the data on the server.

Assumptions: All modules and features of the Tablet Client (iPad) application are in scope of this functional description.

3.1.2.2 Windows Client

The Windows OS native application, used by FF Managers, runs locally on the Windows PC of the user. It is a fully-offline application that communicates data to and from the central server, located in Prague, Czech Republic, exclusively via synchronization. FF Managers use this application to perform the following tasks:

Example Scope:

- a. Search the Customer Database
- b. View Customer Information, including contact information, contact history, profiles, and locations
- c. Update Customer Information (Data Change Requests)
- d. View Cycle Plans and Target Customer Lists of subordinate Reps
- e. Edit Cycle Plans and Target Customer Lists of subordinate Reps
- f. Plan Calls (Agenda Planning)
- g. Execute and Record Calls (Call Reporting)
- h. Plan / Execute all other activity types, both In-Field and Out-Field, Working and Non-Working, including those related to Coaching and other FF Manager duties
- i. View the Calendar, both their own, and that of their subordinate Reps
- j. View KPIs (Dashboards containing results and feedback on current status) of themselves, their subordinate teams, and of their individual Reps
- k. View Sales Data of their assigned territories and regions

Note: the above-listed tasks describe the general capabilities of the application and do not reflect the actual scope of usage expected, which has not yet been defined.

3.1.2.3 Web Reports

The Web Client application, used by FF Managers and HQ Management, runs on standard web browsers (Chrome, Safari, Firefox, Explorer) and relies on a live internet connection to the central server. The application displays queried and processed database information in the form of dashboards and reports, which are rendered using Microsoft's Reporting Services technology. There are two types of reports available:

- a. Mobile Reports, which display information in the form of dynamic (interactive) graphs and charts in a classic dashboard-style layout. Mobile Reports are optimized for use on mobile devices, such as tablets and smartphones, as well as standard desktop monitors.

- b. Paginated Reports, which display information in the form of tabular reports that can be optionally combined with static graphs and charts, and are manipulated by filters. Paginated Reports are optimized for standard desktop monitors.

Note: Mobile Reports will be used to display dashboards and simplified reports that don't require export or extensive filtering options. Paginated Reports will be used for reports that require the ability to be exported and filtered by a wide range of dimensions.

3.1.2.4 AdminTool

The Smart Client application, used by system administrators, allows admins to manage all system parameters that are configurable via settings. These include user set up and role settings, rights administration, customer data attributes and profiles, call scripts, and module settings. General administration is provided by the vendor under the terms of the support contract and associated license agreement.

Local CRM admins employed by [Customer] may be granted specific, limited rights (following appropriate training) to use AdminTool to focus on key support objectives without depending on vendor assistance. These typically include creation and activation of new users, deactivation of retired users, creation of new call report scripts or adjustments to existing ones, and the ability to review and approve customer data change requests ("update requests" in Inception terminology).

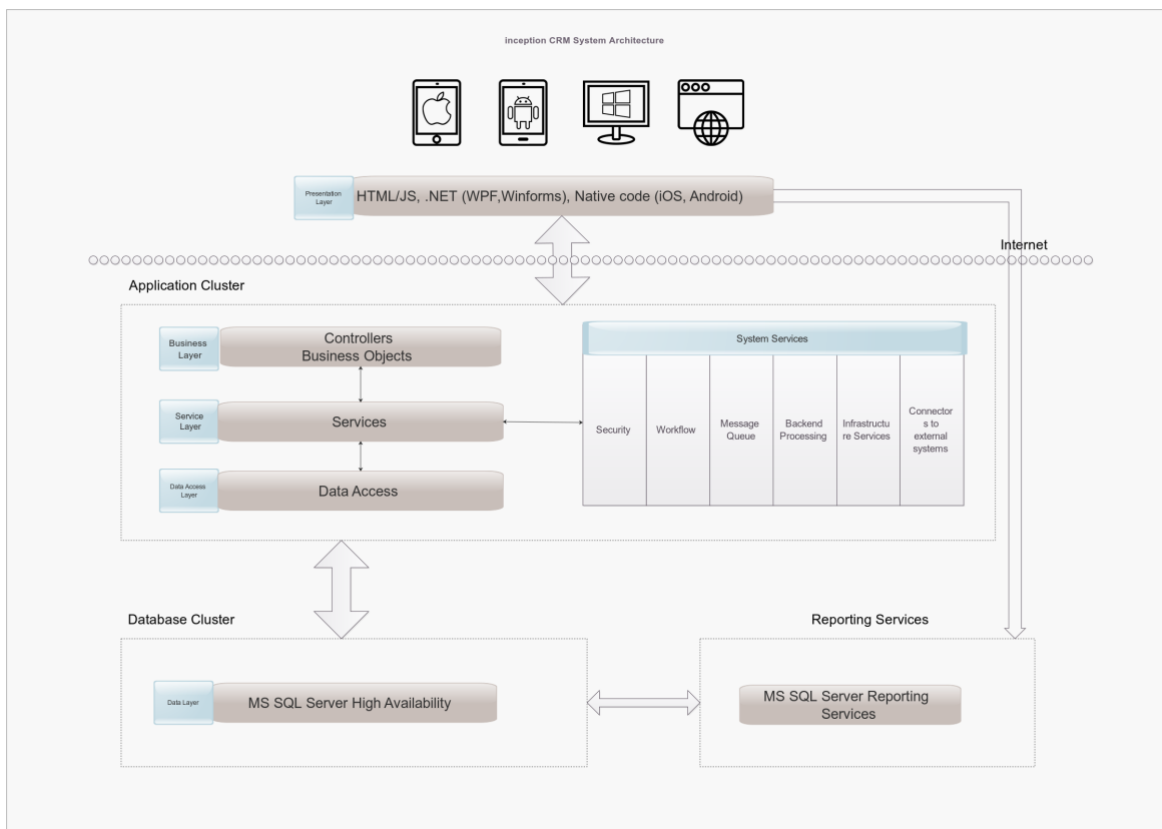
Note: AdminTool will be used primarily or exclusively by the vendor on the client's behalf, as administrative services are in scope of the price offer for Inception CRM end user licenses.

3.2 System Architecture

Inception CRM architecture comprises a three-tier model of software architecture. The architecture consists of the following layers:

1. Presentation Layer
2. Business Layer
3. Service Layer (and System Services)
4. Data Access Layer
5. Data Layer (and Reporting Services)

These layers and their relationships are illustrated by the diagram below:

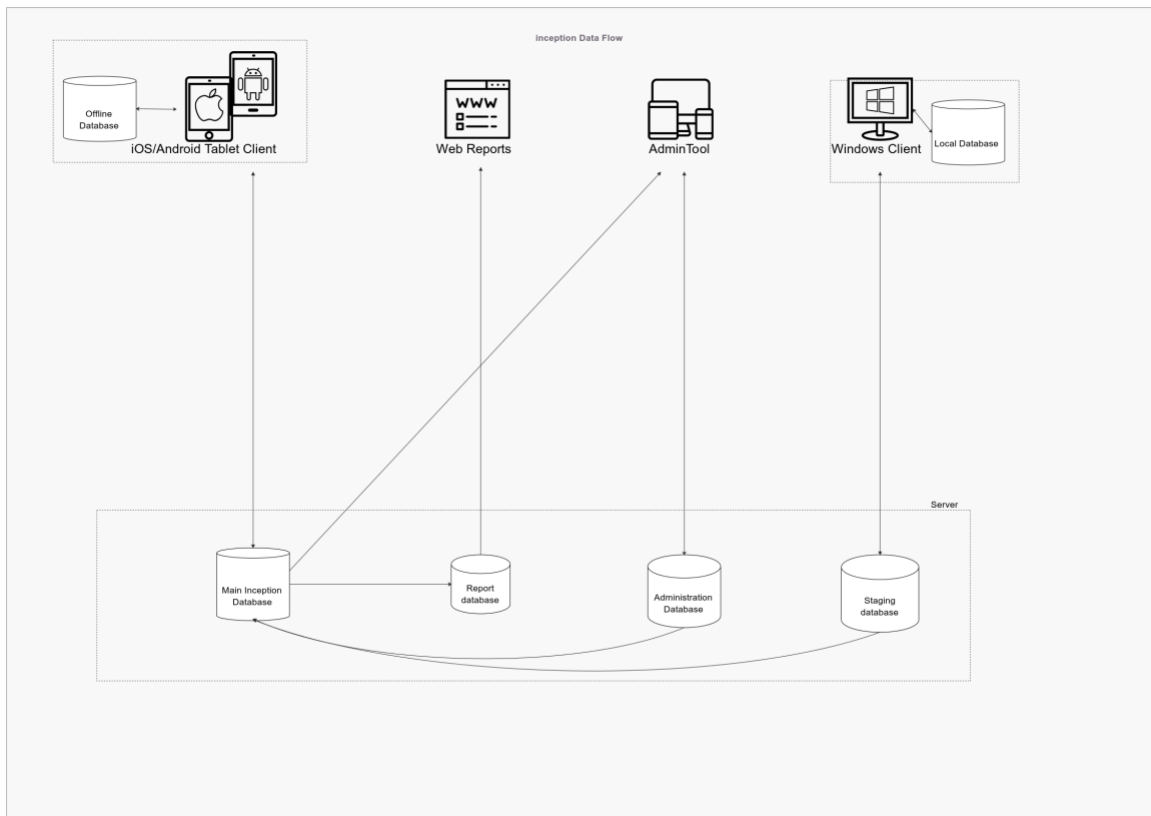


Assumptions: the client will clarify the scope of detail they require for a description of Inception system architecture to be included in this document, and/or other documents where such descriptions are relevant.

3.3 Data Model and Data Flow

Data are communicated to and from end user devices either by online communication using a live internet connection; by manual synchronization by the user; or by automatic periodic synchronization (intermittent background sync) performed by the application itself.

Full database copies are stored locally for offline use on Windows Client, while the Tablet Clients store a limited subset of data for offline use.



The following describes the scope of data stored on end user devices by Inception clients:

3.3.1 Data Stored on Client Applications

3.3.1.1 Tablet Client

Tablet Client applications operate in two modes:

1. Online Mode (default)
2. Offline Mode

In Online Mode, the client communicates with the server directly through the internet in similar way to a web browser. The UI is continuously refreshed with data from the server.

In Offline Mode, the client communicates with the server only after the user manually synchronizes the data.

The amount of data stored on the device for offline use is smaller than the amount of data available when the device is online.

The user can synchronize on demand, both in online and offline mode. The effect of synchronization is to refresh the copy of data stored on the device, and to refresh the server with any changes made on the device while the device was in offline mode.

After synchronization, the application stores a subset of the user's regional data, making those data available to the user when the device is switched to offline mode.

Only limited access to regional data and application functionality is supported in offline mode. In offline mode, limitations apply to the following modules in scope of [Customer] [Country]:

- Search module provides limited access
 - Only customers in active Target Groups are shown
 - Only the main screen of the customer card is displayed; subsections are not available
- Update Requests module is disabled
 - Data change requests to customer records cannot be made
- Planner module is disabled
 - new activities cannot be created
 - scheduled activities backed up during the last synchronization can be reported in the My Work module
- Cycle Plan module is disabled
 - Cycle plans cannot be viewed
- Orders module is disabled
 - Orders can be made via the My Work module
- Warehouse module is disabled
 - New transactions cannot be recorded
- Expenses module is disabled
 - New expenses cannot be recorded
- Dashboard module provides limited access
 - Reports cannot be loaded or refreshed
- Media module provides limited access
 - Media files not already downloaded cannot be downloaded
 - Downloaded media files can be displayed, but cannot be updated

Security, reporting, integration and customization are performed centrally by the Inception platform on the server. User authentication (login) is not possible when the device is offline.

3.3.1.2 Windows Client

On Windows PCs, a full copy of the user's regional database (based on the user's Region Assignments) is stored locally on the device for offline access and use (local DB copy) by the client application. Additionally, the client contains its own installation of MS SQL Server.

The Windows Client application requires no live internet connection in order to be used in its fully functional form. All modules, features, and functions are available offline.

The Windows Client application communicates with the central server via Inception's synchronization services.

Security, reporting, integration and customization are performed locally by the Windows Client application. User authentication (login) is possible when the device is offline.

3.3.1.3 Web Reports

The web client application, “Web Reports” presents structured information from the database in the form of reports and dashboards. The user interface is a browser that renders reports which are generated on the server and transmitted to the user’s station through a secure connection (https).

Reports and reporting data are neither stored nor cached on the end user station, and are accessible only for the duration of the active session.

Security, reporting, integration and customization are performed centrally by the Inception platform. User authentication (login) is not possible when the browser is offline.

3.3.1.4 AdminTool

The smart client application, “AdminTool” provides direct access to Inception’s administration by way of a self-downloading application, using click-once technology, that functions locally on the administrator’s device without the need for local installation.

AdminTool is an online Windows application that provides full desktop functionality without local storage. Access to its features requires a live internet connection. Its data are neither stored nor cached on the end user station, and are accessible only for the duration of the active session.

Security, reporting, integration and customization are performed central by the Inception platform. User authentication (login) is not possible when the device is offline.

3.4 Security Characteristics

All communication is managed via the internet, using standard encryption (https). End user applications prevent unauthorized access by several security features:

- Bundle ID
- Credentialed Access
- Password Policy
- Data Encryption
- Role-Based Authorization

All instances of the system are logically and physically separated.

3.5 User Authentication and Access

User Authentication is managed by Inception. User accounts are created directly as Inception user accounts. There will be no integration to [Customer] Identity and Access Management databases.

Access to [Customer] data stored in Inception is possible either through a web-browser using laptops and tablets (to access Web Reports), or through network-enrolled [Customer] laptops and tablets with installed client applications (Windows and Tablet), which access data through Inception’s APIs.

User authentication requires the user to enter a username and password, which will be configured per [Customer] password policies. Data access is defined by the end user's assigned regions and roles, which together define the scope of data ownership and application rights within the system.

3.6 Inception Authorization Model

In Inception, there are six authorization levels available for granting permissions within the application:

1. **Region Assignment** — defines the regions or territories (Geo Units) whose data are visible to users
2. **Roles** — defines a specific permission that can be granted to a user for access to specific data or application feature/function
3. **Role Instances** — defines a concrete occurrence of a role and its associated rights. An instance is usually named according to the rights that are being granted and the role groups who holds those rights
4. **Data Ownership** — defines which specific data within an instance of role that a specific user can see by defining the data owners for each attribute within that instance.
5. **Role Groups** — defines a group of users who are assigned to an instance of a role
6. **Module Settings** — defines global permissions or settings available to all users, regardless of their roles, to access a part of the application (feature/function) and its corresponding data

3.6.1 Hierarchy

The following hierarchy is used:

1. Module Settings
2. Region Assignment
3. Role
4. Role Instance —> Data Ownership
5. Role Group —> Static or Dynamic

3.6.2 Region Assignment

Regional data access is defined by region assignment, which is configured separately for each user.

3.6.3 Roles

A role is defined as a function or partial function (e.g. print, export, etc.) in the system. A role is defined through its definition, which uses the following convention: **App. Section. Action.** (e.g. WinClient.Planner.Export – a user who has this role can export data from the Planner of Windows Client).

Roles are used define a user's action-level permissions to specify the actions that a user can perform (e.g. view, edit, delete, create, etc.) in Inception. Roles also control the following:

- Modules and module subsections available to the user

- IU layouts and features a user sees
- Fields a user can see and edit
- Record types and records available to the user

3.6.4 Role Instance

Each role definition is used by an “instance,” which is a kind of use case (e.g. “all FLM users can export from Planner”) and grants a role to a group of users. An instance is usually named according to the rights that are being granted (e.g. export) and the user group who holds those rights (e.g. FLM).

3.6.5 Data Ownership

The definitions for data ownership in Inception are as follows:

- User’s own data (“My”) = user can only see his/her own data
- Data from User’s region and user type (“MyRegionAndType”) = user can see all data within his/her region by users of the same type (e.g. Rep)
- Data from User’s subordinates (“Subord”) = user can see all data from his/her subordinates
- Data from User’s supervisors (“Supervisor”) = user can see all data from his/her supervisor
- All data (“All”) = user can see all data by all users in all regions

A role instance can contain any combination of the above data ownership options.

3.6.6 Role Group

A Role Group is a group of users to whom the administrator assigns one or more instances of roles. A role group can be defined by user type (e.g. all representatives) or by assignment to an organization unit (e.g. all users in a BU or line). The administrator can also assign individual users to a role group, regardless of their type or organization assignment.

There are no organization-wide defaults for users outside of a role group. All users that require the same level of access to the system have to be assigned the same roles.

3.6.7 Module Settings

Additional access controls are managed by module settings, which apply globally regardless of Roles or User Groups. A module setting can be used to disable an entire module or function so that even users who have roles granting access will not be able to access it.

3.7 Generic Role Groups

Inception CRM contains the following standard user role groups, which describe the permissions and rights available to the different user types on the primary CRM client applications used by end users (Windows, Tablet, Web Reports):

- ALL
- ALL_HQ
- ALL_REPs
- AllButReps
- D3S (= super user)
- FLM (=DM)

For standard implementations, 72 roles have been defined to manage the specific permissions of each role group. The following standard business roles (user groups) fall into one or more of the above role groups:

- Rep
- Pharmacy Rep
- Senior Pharmacy Rep
- DM
- HQ

The full list of all role group and role assignments by [Customer] business role will be described once specific user types have been defined. Additional roles may be established later according to [Customer] requirements.

Additional permissions are managed by module settings (module-specific administration) in AdminTool by the vendor. Admin permissions are not in the scope of this overview.

Role Group and Role assignments for individual users of Inception CRM can be prepared.

3.8 User Account Administration

User account administration, including new account creation and updates to existing accounts, is managed by super users (vendor). New users are typically assigned to Role Groups, and inherit the roles and associated permissions belonging to those groups. Additional permissions are managed by module settings, which apply globally to all users who have access to a module.

3.9 Access and Password Management

Access to the system is protected by a unique username and password. All the users are assigned a unique user name during the account creation process. Usernames are drawn from the unique part (text before the domain identifier) of their official Sandoz email addresses. No generic usernames are allowed.

The login process does not provide any assistance for the login procedure. A username and password are required each time the user wants to log in to the system, both offline and online. Offline login is not supported for Tablet Client, Web Reports, or AdminTool, but is supported for Windows Client.

Passwords are not displayed while being entered but are be masked by asterisks. Credentials are transmitted to the server through a secure gateway in an encrypted format. There are no active users with a blank password or a default password. The system stores passwords in a non-human readable (hashed) format. Passwords are not retrievable even by administrators.

Users may request a new password in the Settings module of the Tablet application. A new password manager (“Change Password”) requires the user to enter their current password, and enter a new twice in order to save it.

The Inception platform does not permit password recovery in case of lost or forgotten passwords; new temporary passwords can be generated by admin in case the user can't remember their current password.

The password policy will follow the [Customer] password policy as described in the URS.

3.10 Environment Management

There will be two environments for [Customer] [Country]: Live (production) and Test (QA, a copy of production). These two environments occupy a single local instance. No instance is shared with other customers or countries.

Development is performed outside of the [Customer] country environment in a separate developer environment (Source). Changes are tested in Test and then deployed to Live for business users. There is no corporate instance for [Customer] in the scope of this specification.

3.11 Activity Tracking

All records created in the Inception system contain the following attributes: Author, Creation Date with timestamp, Last Modification Author, Last Modification Date with timestamp, Record State (active, deactivated).

3.12 Batch Jobs

The following batch jobs are performed on the server as part of Inception's solution services in scope of [Customer] [Country]:

1. Synchronization Packages Generator
2. Cycle Plan Runner
3. Auto Close Day Job
4. Database Generation Job
5. Sales Data Processing Jobs
6. Data Check Processing Jobs
7. Call Report Processing Job
8. Dynamic Profiles Processing Job
9. Data Import Jobs
10. AdminTool Batch Schedule Jobs
11. Report Subscription/Cache Refresh Jobs

3.13 Exception Handling

The following exceptions are handled using the tools listed below:

1. Application exceptions are logged through **Log4Net library**
2. Tablet Client code handles exceptions through **Xamarin Insights**
3. Inception Server Applications are monitored through **Centreon**
4. Inception Server Hardware is monitored through **Nagios**
5. Application Server Logs are recorded in **IIS log files**

3.14 System Logs - File Formats

1. Internet Information log files (W3S format)

#Fields: date time s-ip cs-method cs-uri-stem cs-uri-query s-port cs-username c-ip cs(User-Agent) cs(Referer) sc-status sc-substatus sc-win32-status sc-bytes cs-bytes time-taken

2. Log4Net log format

%date [%thread] %-5level %logger [%property{NDC}] - %message%newline

(this may differ for each application)

3. Backup log format:

{%level}%date{MM/dd HH:mm:ss} - %message%newline

4 Technical Architecture

The sections of this chapter that are out of scope of this functional description are marked Not Applicable. As a vendor hosted solution, all technical components of the Inception platform are managed in the vendor's hosted environment. An infrastructure diagram is provided in Sec. 4.1.4.

Details of the vendor's infrastructure, network, and application architecture will be available in vendor documentation. Where appropriate, brief descriptions of relevant touchpoints are provided.

4.1 Hardware Inventory, Specifications and Locations

4.1.1 Servers

Inception CRM and associated client data are stored and hosted in the D3S a.s. data center ("Nagano") operated by Dial Telecom a.s. The datacenter contains the master database(s) for all instances, countries, regions, and users. Subsets of master data ("local data"), the access rights to which are defined by role, are accessed via Inception client applications.

Server infrastructure, hardware, and configurations are managed by the vendor.

4.1.1.1 Instances

The Inception CRM system consists of several logically and physically separated instances that utilize the same production infrastructure. The primary division of instances is per customer and country. Each instance consists of two environments: Live (production), and Test (QA, copy of production). No two instances share data or permit mutual access.

For [Customer], a single instance will be established (for [Country]), with none of its environments being shared with other customers. Security, reporting, integration and customization are performed by the Inception platform.

4.1.2 Input / Output Devices

Specific types of end user devices are assigned by business role, according to the applications required by the user for data entry and information access. The following standard, non-customized devices and their related applications are described below, per vendor specifications:

Device	Application (s)	Client Type	User Business Role	Supported Models and Configurations
iPad	Tablet Client	iOS-native	Field Sales Representatives (Rep)	<ul style="list-style-type: none"> ➤ Minimum: <ul style="list-style-type: none"> ○ iOS 10.3 running on <ul style="list-style-type: none"> ▪ iPad Mini 3 ▪ iPad Air ○ Mobile Internet ➤ Recommended: <ul style="list-style-type: none"> ○ iOS 11.1 running on <ul style="list-style-type: none"> ▪ iPad Mini 4 ▪ iPad Air 2 ▪ iPad 2017 ○ LTE mobile internet
Android	Tablet Client	Android-native	Field Sales Representatives (Rep)	<ul style="list-style-type: none"> ➤ Minimum: <ul style="list-style-type: none"> ○ Google Android 5.0.1 and higher ○ 2 GB RAM ○ 16 GB HDD ○ Mobile internet ○ Screen Resolution: 1280 x 800 ○ Screen Size: 7-inch and larger ➤ Recommended: <ul style="list-style-type: none"> ○ Android 6.0 ○ 3 GB RAM ○ 32 GB HDD ○ LTE mobile internet ○ Screen Resolution: 1920 x 1080 ○ Screen Size: 10-inch

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Version: #001

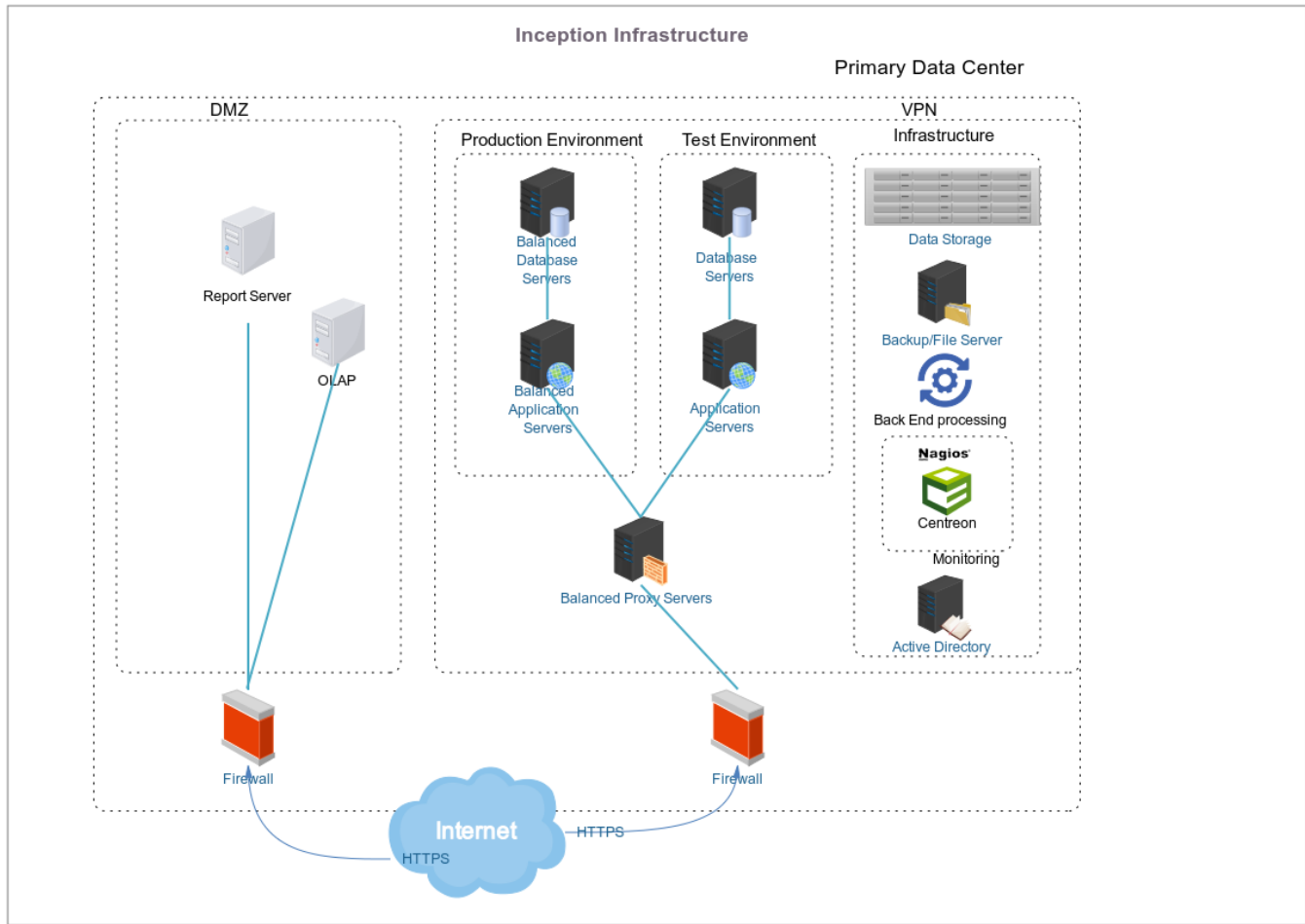
Device	Application (s)	Client Type	User Business Role	Supported Models and Configurations
Windows Laptop / PC	Windows Client	Windows	District Sales Managers (DM)	<ul style="list-style-type: none"> ➤ Supported OS: <ul style="list-style-type: none"> ○ Windows 7, 8, 10 ○ Min.: 32bit ○ Rec.: 64bit ➤ Minimum: <ul style="list-style-type: none"> ○ CPU Intel I3 ○ 4GB RAM ○ 20GB HDD ○ Screen Resolution: 1280 x 800 <i>or</i> 1366 x 768 ○ .NET Framework 4.0 ○ MS SQL Server 2014 or later (Express Edition) ➤ Recommended: <ul style="list-style-type: none"> ○ CPU Intel I5 ○ 8GB RAM, 128 GB SSD HDD ○ Screen Resolution: 1280 x 800 <i>or</i> 1366 x 768 ○ .NET Framework 4.0 ○ MS SQL Server 2014 or later (Standard Edition)
Windows Laptop / PC	Web Reports	Web	All Managers (HQ)	<ul style="list-style-type: none"> ➤ Supported Browsers: use the latest versions of <ul style="list-style-type: none"> ○ Google Chrome ○ Mozilla Firefox ○ Microsoft Edge ○ Internet Explorer (some features may require compatibility mode)

Device	Application (s)	Client Type	User Business Role	Supported Models and Configurations
Windows Laptop / PC	AdminTool	Smart	Administrators (Admin)	<ul style="list-style-type: none"> ➤ Supported OS: <ul style="list-style-type: none"> ○ Windows 7, 8, 10 ○ Min.: 32bit ○ Rec.: 64bit ➤ Minimum: <ul style="list-style-type: none"> ○ CPU Intel I3 ○ 4GB RAM ○ 20GB HDD ○ Screen Resolution: 1280 x 800 <i>or</i> 1366 x 768 ○ .NET Framework 4.5.2 or later ➤ Recommended: <ul style="list-style-type: none"> ○ CPU Intel I5 ○ 8GB RAM, 128 GB SSD HDD ○ Screen Resolution: 1280 x 800 <i>or</i> 1366 x 768 ○ .NET Framework 4.5.2 or later

4.1.3 Other Devices

Not Applicable

4.1.4 Infrastructure Diagram



4.1.5 Middleware Hosting

Not Applicable

4.2 Interfaces with Other Hardware and External Integration Points

Not Applicable

4.3 Physical Layout

Not Applicable

4.4 Additional Information

Not Applicable

5 Configuration Specification

The Inception platform is a vendor-hosted solution. Management of all system and infrastructure parameters, including parameters for the set up and configuration of software and interfaces, parameters for ensuring logical and physical security of servers, networks, ports, databases and other critical components, and parameters for the configuration of all Inception's services, are managed by the vendor.

Inception client applications require standard configuration of end user devices. Inception Tablet and Windows client applications will run natively on standard iPads and Windows computers, per the stated minimum requirements described in Sec. 1.4.2.

Configuration of device security parameters is the responsibility of the customer. Applications are intended to be distributed internally to end user stations through the customer's internal device management network (MDM), or app store, where applications are tested, versioned, and published for end users.

This chapter describes the configuration items in scope of customer use for the set up and management of the Inception system and Inception client applications. There are 324 distinct settings typically used to parameterize Inception customers.

5.1 Application Parameters and Settings – all modules

Setting	Section	Subsection	Field Name	Field Type	Module
Persons and Institution Types	Administration	Module Setting	ET filter for mobile client	12 different settings	Search
Setting how many samples user can give to doctor	Administration	Module Setting	Warehouse limits for brans transfers	Single Value	Warehouse
Setting which option user can see in search filters	Administration	Module Setting	Configuration of search module	9 different settings	Search
Setting on mobile client behavior (GPS tracking, default settings, etc.)	Administration	Module Setting	General setting of mobile client	15 different settings	General setting
Setting behaviour and available functions of Expenses module	Administration	Module Setting	Mobile Expenses module configuration	34 different settings	Expense Diary
Setting behaviour and available functions of planer module	Administration	Module Setting	Planner setting	9 different settings	Planner

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Setting	Section	Subsection	Field Name	Field Type	Module
Setting behaviour and available functions of sales data module	Administration	Module Setting	Sales Data module settings	27 different settings	Sales Data
Setting behaviour and available functions of transfer order module	Administration	Module Setting	Transfer order module setting	56 different settings	Transfer Order
Budget Management for each user and each period	Budget Management	Budget Periods	Name	Text	Expense Diary
Budget Management for each user and each period	Budget Management	Budget Periods	From	Date	Expense Diary
Budget Management for each user and each period	Budget Management	Budget Periods	To	Date	Expense Diary
Budget Management for each user and each period	Budget Management	Budget Templates	Name	Text	Expense Diary
Budget Management for each user and each period	Budget Management	Budget Templates	Expense Type	Multi Value	Expense Diary
Budget Management for each user and each period	Budget Management	Budget Templates	Payment Type	Multi Value	Expense Diary
Budget Management for each user and each period	Budget Management	Budget Templates	Cost Center	Multi Value	Expense Diary
Budget Management for each user and each period	Budget Management	Budget Templates	Description	Multi Value	Expense Diary
Budget Management for each user and each period	Budget Management	Budget Assignments	Amount	Currency	Expense Diary
Budget Management for each user and each period	Budget Management	Import budget	Load budget from file	File	Expense Diary
Creating, Editing, Deleting Activities	Campaign Management	Activities	Name	Text	Planner
Creating, Editing, Deleting Activities	Campaign Management	Activities	Abbrev.	Text	Planner
Creating, Editing, Deleting Activities	Campaign Management	Activities	Group	Picklist	Planner

Setting	Section	Subsection	Field Name	Field Type	Module
Creating, Editing, Deleting Activities	Campaign Management	Activities	Can have call report	True/False	Planner
Creating, Editing, Deleting Activities	Campaign Management	Activities	Allow multiple call report	True/False	Planner
Creating, Editing, Deleting Activities	Campaign Management	Activities	Use State Machine	True/False	Planner
Creating, Editing, Deleting Activities	Campaign Management	Activities	Can have CLM	True/False	Planner
Creating, Editing, Deleting Activities	Campaign Management	Activities	Allow multiday	True/False	Planner
Creating, Editing, Deleting Activities	Campaign Management	Activities	Show Percentage Duration	True/False	Planner
Creating, Editing, Deleting Activities	Campaign Management	Activities	Icon	Picture	Planner
Creating, Editing, Deleting Activities	Campaign Management	Activities	Role assignment (how can see act)	Multi Value	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Name	Text	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Description	Text	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	From	Date	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	To	Date	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Allow attachments	True/False	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Type (CLM or standard form)	Single Value	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	User Type (who can fill CR)	Multi Value	Planner

Setting	Section	Subsection	Field Name	Field Type	Module
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Activity Type	Multi Value	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Specialization	Multi Value	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Person Type	Multi Value	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Institution Type	Multi Value	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Org Unit Assignment	Multi Value	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Question - Name	Text	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Question - Type	Picklist	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Question - Next Question	Link	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Question - Mandatory	Single Value	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Question - Final	True/False	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Question - Profile Link	Multi Value	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Answer - Name	Text	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Answer - Value	Text	Planner

Setting	Section	Subsection	Field Name	Field Type	Module
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Answer - Unique group	Picklist	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Answer - Next question	Link	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Answer - Final	True/False	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Answer - Profile links	Multi Value	Planner
Creating, Editing, Deleting call reports for activities	Campaign Management	Call Reports	Answer - Brand assignation	Picklist	Planner
Creating, Editing, Deleting CLM for activities	Campaign Management	CLM Presentation	Name	Text	Planner
Creating, Editing, Deleting CLM for activities	Campaign Management	CLM Presentation	URL	Link	Planner
Creating, Editing, Deleting CLM for activities	Campaign Management	CLM Presentation	Load Data	File	Planner
Creating, Editing, Deleting CLM for activities	Campaign Management	CLM Presentation	Type	Picklist	Planner
Creating, Editing, Deleting CLM for activities	Campaign Management	CLM Presentation	Version	Single Value	Planner
Creating, Editing, Deleting CLM for activities	Campaign Management	CLM Presentation	Pick Questionnaire	Link to call report	Planner
Creating, Editing, Deleting CLM for activities	Campaign Management	CLM Presentation	Delete Questionnaire	Delete call report	Planner
Creating, Editing, Deleting CLM for activities	Campaign Management	CLM Presentation	Icon	Picture	Planner

Setting	Section	Subsection	Field Name	Field Type	Module
Creating, Editing, Deleting CLM for activities	Campaign Management	CLM Presentation	Manifest	XML	Planner
Setting free days	Campaign Management	Holidays	Name	Text	Planner
Setting free days	Campaign Management	Holidays	Date	Date	Planner
Setting free days	Campaign Management	Holidays	National holiday	True/False	Planner
Setting free days	Campaign Management	Holidays	Company free day	True/False	Planner
Import ready setting of activities from file	Campaign Management	Import Activity Types	Load from file	File	Planner
Import ready setting of call reports from file	Campaign Management	Import Call Reports	Load from file	File	Planner
Import ready setting of CLM presentation from file	Campaign Management	Import CLM Presentation	Load from file	File	Planner
Import ready setting of holidays from file	Campaign Management	Import Holiday	Load from file	File	Planner
Import ready setting of period from file	Campaign Management	Import Periods	Load from file	File	Planner
Import ready setting of Target Group profiles from file	Campaign Management	Import Profile TG values	Load from file	File	Planner / Search
Import ready setting of Target Group from file	Campaign Management	Import Target Groups	Load from file	File	Planner / Search
Setting periods (cycle date from-to, sales data, Expenses etc.)	Campaign Management	Period Definition	Name	Text	Many modules
Setting periods (cycle date from-to, sales data, Expenses etc.)	Campaign Management	Period Definition	Period Type	Picklist	Many modules
Setting periods (cycle date from-to, sales data, Expenses etc.)	Campaign Management	Period Definition	Date From	Date	Many modules

Setting	Section	Subsection	Field Name	Field Type	Module
Setting periods (cycle date from-to, sales data, Expenses etc.)	Campaign Management	Period Definition	Date To	Date	Many modules
Assign periods to proper business units	Campaign Management	Period Irg. Units Assign.	Period	Picklist	Many modules
Assign periods to proper business units	Campaign Management	Period Irg. Units Assign.	Org Unit Assignment	Multi Value	Many modules
Setting periods type (month, cycle, quarter, year, custom,)	Campaign Management	Period Type Definition	Name	Text	Many modules
Setting periods type (month, cycle, quarter, year, custom,)	Campaign Management	Period Type Definition	Key	Text	Many modules
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Group - Caption	Text	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Group - From	Date	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Group - To	Date	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Group - Person	True/False	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Group - Institution	True/False	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Group - Access right	Multi Value	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Group - Format	Multi Value	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Item - Caption	Text	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Item - Assignment	Text	Search

Setting	Section	Subsection	Field Name	Field Type	Module
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Item - Type	Picklist	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Item - Values	Multi Value	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Item - Product	Multi Value	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Item - Read Only	True/False	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Item - Show between	Date	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Item - Log history	True/False	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Item - Dynamic	SQL Query	Search
Creating, Editing, Deleting available customer profiles	Campaign Management	Profiles	Profile Item - Format	Multi Value	Search
Creating, Editing, Deleting Target Group settings	Campaign Management	Target Group Management	Name	Text	Planner/Search/Cycle Plan
Creating, Editing, Deleting Target Group settings	Campaign Management	Target Group Management	Period	Picklist	Planner/Search/Cycle Plan
Creating, Editing, Deleting Target Group settings	Campaign Management	Target Group Management	Org Unit Assignments	Multi Value	Planner/Search/Cycle Plan
Creating, Editing, Deleting Target Group settings	Campaign Management	Target Group Management	User Assignments	Multi Value	Planner/Search/Cycle Plan
Creating, Editing, Deleting Target Group settings	Campaign Management	Target Group Management	Editable From	Date	Planner/Search/Cycle Plan

Setting	Section	Subsection	Field Name	Field Type	Module
Creating, Editing, Deleting Target Group settings	Campaign Management	Target Group Management	Editable To	Date	Planner/Search/Cycle Plan
Customization columns displaying as results	Configs Management	Institution Search Config	Name, Config, Assignments	Multi Value	Search
Customization columns displaying as results	Configs Management	Person Search Config	Name, Config, Assignments	Multi Value	Search
Customization columns displaying as results	Configs Management	Planner Search Config	Name, Config, Assignments	Multi Value	Planner
Customization columns displaying as results	Configs Management	Product Search Config	Name, Config, Assignments	Multi Value	Sales Data
Customization columns displaying as results	Configs Management	Sales Data Search Config	Name, Config, Assignments	Multi Value	Sales Data
Customization columns displaying as results	Configs Management	Territory Management Config	Name, Config, Assignments	Multi Value	Territory Management
Customization columns displaying as results	Configs Management	Transfer Orders Search Config	Name, Config, Assignments	Multi Value	Transfer Order
Creating, Editing, Deleting Cost Center settings	Cost Center Management	Cost Center	Name	Text	Expense Diary
Creating, Editing, Deleting Cost Center settings	Cost Center Management	Cost Center	Key	Text	Expense Diary
Creating, Editing, Deleting Cost Center settings	Cost Center Management	Cost Center	Group (Personal, Product, BU)	Picklist	Expense Diary
Creating, Editing, Deleting Cost Center settings	Cost Center Management	Cost Center	Users	Multi Value	Expense Diary
Creating, Editing, Deleting Cost Center settings	Cost Center Management	Cost Center	From	Date	Expense Diary
Creating, Editing, Deleting Cost Center settings	Cost Center Management	Cost Center	To	Date	Expense Diary

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Setting	Section	Subsection	Field Name	Field Type	Module
Import ready setting of cost centers from file	Cost Center Management	Cost Center	Load from file	File	Expense Diary
Managing Expenses module	Expense Diary Management	Expense Diary Periods	Title	Text	Expense Diary
Managing Expenses module	Expense Diary Management	Expense Diary Periods	From	Date	Expense Diary
Managing Expenses module	Expense Diary Management	Expense Diary Periods	To	Date	Expense Diary
Managing Expenses module	Expense Diary Management	Expense Diary Periods	Warning Date	Date	Expense Diary
Managing Expenses module	Expense Diary Management	Expense Diary Periods	Closing date	Date	Expense Diary
Managing Expenses module	Expense Diary Management	Expense Types	Name	Text	Expense Diary
Managing Expenses module	Expense Diary Management	Expense Types	Key	Text	Expense Diary
Managing Expenses module	Expense Diary Management	Expense Types	Default VAT	Picklist	Expense Diary
Managing Expenses module	Expense Diary Management	Expense Types	SAP id	Number	Expense Diary
Managing Expenses module	Expense Diary Management	Expense Types	Description	Multi Value	Expense Diary
Managing Expenses module	Expense Diary Management	Expense Types	Payment Type	Multi Value	Expense Diary
Managing Expenses module	Expense Diary Management	Expense Types	Use in Windows Client	True/False	Expense Diary
Managing Expenses module	Expense Diary Management	Expense Types	Use in Web Client	True/False	Expense Diary
Managing Expenses module	Expense Diary Management	Income Types	Name	Text	Expense Diary
Managing Expenses module	Expense Diary Management	Income Types	Key	Text	Expense Diary

Setting	Section	Subsection	Field Name	Field Type	Module
Import ready setting of diary periods from file	Expense Diary Management	Import Expense Diary Periods	Load from file	File	Expense Diary
Import ready setting of expense types from file	Expense Diary Management	Import Expense Types	Load from file	File	Expense Diary
Import ready setting of incomes types from file	Expense Diary Management	Import Income Types	Load from file	File	Expense Diary
Settings of Home Page and announcement module	Homepage Management	Layout	Title	Text	Homepage
Settings of Home Page and announcement module	Homepage Management	Layout	Design View	Special Tool	Homepage
Settings of Home Page and announcement module	Homepage Management	Layout	Published	True/False	Homepage
Settings of Home Page and announcement module	Homepage Management	Layout	From	Date	Homepage
Settings of Home Page and announcement module	Homepage Management	Layout	To	Date	Homepage
Settings of Home Page and announcement module	Homepage Management	Layout	Author	Text	Homepage
Settings of Home Page and announcement module	Homepage Management	Layout	Receivers	Multi Value	Homepage
Settings of Home Page and announcement module	Homepage Management	Links	Title	Text	Homepage
Settings of Home Page and announcement module	Homepage Management	Links	Report	Picklist	Homepage
Settings of Home Page and announcement module	Homepage Management	Links	Url	link	Homepage
Settings of Home Page and announcement module	Homepage Management	Links	Icon	Picture	Homepage

Setting	Section	Subsection	Field Name	Field Type	Module
Settings of Home Page and announcement module	Homepage Management	Links	Published	True/False	Homepage
Settings of Home Page and announcement module	Homepage Management	Links	From	Date	Homepage
Settings of Home Page and announcement module	Homepage Management	Links	To	Date	Homepage
Settings of Home Page and announcement module	Homepage Management	Links	Type	Picklist	Homepage
Settings of Home Page and announcement module	Homepage Management	Links	Order	Number	Homepage
Settings of Home Page and announcement module	Homepage Management	Links	Author	Text	Homepage
Settings of Home Page and announcement module	Homepage Management	Links	Receivers	Multi Value	Homepage
Settings of Home Page and announcement module	Homepage Management	Messages	Title	Text	Homepage
Settings of Home Page and announcement module	Homepage Management	Messages	Subtitle	Text	Homepage
Settings of Home Page and announcement module	Homepage Management	Messages	Body	HTML	Homepage
Settings of Home Page and announcement module	Homepage Management	Messages	Published	True/False	Homepage
Settings of Home Page and announcement module	Homepage Management	Messages	From	Date	Homepage
Settings of Home Page and announcement module	Homepage Management	Messages	To	Date	Homepage

Setting	Section	Subsection	Field Name	Field Type	Module
Settings of Home Page and announcement module	Homepage Management	Messages	Location	Multi Value	Homepage
Settings of Home Page and announcement module	Homepage Management	Messages	Order	Number	Homepage
Settings of Home Page and announcement module	Homepage Management	Messages	Application	Multi Value	Homepage
Settings of Home Page and announcement module	Homepage Management	Messages	Author	Text	Homepage
Settings of Home Page and announcement module	Homepage Management	Messages	Receivers	Multi Value	Homepage
Managing company organization structure	OrgStruct Management	Org.units	Org.unit name	Text	General setting
Managing company organization structure	OrgStruct Management	Org.units	Org.unit type	Picklist	General setting
Managing company organization structure	OrgStruct Management	Org.units	Parent org.unit	Picklist	General setting
Managing reports available for users in application and web reports	Report Management	Reports	Name	Text	Reports / Web Reports
Managing reports available for users in application and web reports	Report Management	Reports	Key	Text	Reports / Web Reports
Managing reports available for users in application and web reports	Report Management	Reports	Documentation	Text	Reports / Web Reports
Managing reports available for users in application and web reports	Report Management	Reports	URL	Link	Reports / Web Reports

Setting	Section	Subsection	Field Name	Field Type	Module
Managing reports available for users in application and web reports	Report Management	Reports	RS Setting	Picklist	Reports / Web Reports
Managing reports available for users in application and web reports	Report Management	Reports	RS Path	Source	Reports / Web Reports
Managing reports available for users in application and web reports	Report Management	Reports	Format	Multi Value	Reports / Web Reports
Managing reports available for users in application and web reports	Report Management	Report Lists	Name	Text	Reports / Web Reports
Managing reports available for users in application and web reports	Report Management	Report Lists	Groups	Multi Value	Reports / Web Reports
Managing reports available for users in application and web reports	Report Management	Report Lists	Rights	Multi Value	Reports / Web Reports
Managing reports available for users in application and web reports	Report Management	Report Lists	Format	Multi Value	Reports / Web Reports
Managing reports available for users in application and web reports	Report Management	Report Groups	Name	Text	Reports / Web Reports
Managing reports available for users in application and web reports	Report Management	Report Groups	Report	Multi Value	Reports / Web Reports
Propagation changes to live or test environment, generating scripts	Request Processing Engine	Batches processing	Special tool	Special Tool	General setting
Managing access rights	Role Management	Roles	Name	Text	General setting

Setting	Section	Subsection	Field Name	Field Type	Module
Managing access rights	Role Management	Roles	Definitions	Picklist	General setting
Managing access rights	Role Management	Roles	Description	Text	General setting
Managing access rights	Role Management	Roles	Group	Multi Value	General setting
Managing access rights	Role Management	Roles	Granted	True/False	General setting
Managing access rights	Role Management	Roles	ValidFrom	Date	General setting
Managing access rights	Role Management	Roles	ValidTo	Date	General setting
Managing access rights	Role Management	Role Groups	Name	Text	General setting
Managing access rights	Role Management	Role Groups	User	Multi Value	General setting
Managing access rights	Role Management	Role Groups	OrgUnit	Multi Value	General setting
Managing access rights	Role Management	Role Groups	Type	Multi Value	General setting
Managing access rights	Role Management	Data Owners	Role	Picklist	General setting
Managing access rights	Role Management	Data Owners	User Group	Picklist	General setting
Managing access rights	Role Management	Data Owners	My	True/False	General setting
Managing access rights	Role Management	Data Owners	MyRegionAndType	True/False	General setting
Managing access rights	Role Management	Data Owners	Subord	True/False	General setting
Managing access rights	Role Management	Data Owners	Supervisor	True/False	General setting

Setting	Section	Subsection	Field Name	Field Type	Module
Managing access rights	Role Management	Data Owners	All	True/False	General setting
Managing access rights	Role Management	Data Owners	Referenced	True/False	General setting
Managing access rights	Role Management	Data Owners	AccessDeactivated	True/False	General setting
Managing access rights	Role Management	Data Owners	Access_SameGeoUnits	True/False	General setting
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Brands	Name	Text	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Brands	Type	Picklist	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Brands	Unique ID	Text	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Brands	Molecule	Multi Value	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Brands	Manufacturer	Multi Value	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Brands	My brand	True/False	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	Name	Text	Sales Data/Warehouse/Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	Description	Text	Sales Data/Warehouse/Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	Brand	Picklist	Sales Data/Warehouse/Transfer Orders

Setting	Section	Subsection	Field Name	Field Type	Module
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	Type	Picklist	Sales Data/Warehouse/Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	SAP	Text	Sales Data/Warehouse/Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	EAN	Text	Sales Data/Warehouse/Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	Code	Number	Sales Data/Warehouse/Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	Package	Number	Sales Data/Warehouse/Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	VAT	Number	Sales Data/Warehouse/Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	Pieces	Number	Sales Data/Warehouse/Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	Dosage	Text	Sales Data/Warehouse/Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	Dosage Form	Picklist	Sales Data/Warehouse/Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	ATC Code	Picklist	Sales Data/Warehouse/Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	Product Category	Picklist	Sales Data/Warehouse/Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	B2B Active	True/False	Sales Data/Warehouse/Transfer Orders

Setting	Section	Subsection	Field Name	Field Type	Module
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	External ID 1	Text	Sales Data/Warehouse/ Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	External ID 2	Text	Sales Data/Warehouse/ Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product	External ID 3	Text	Sales Data/Warehouse/ Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Price	Date From	Date	Sales Data/Warehouse/ Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Price	Product	Picklist	Sales Data/Warehouse/ Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Price	Price	Currency	Sales Data/Warehouse/ Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Price	Currency	Picklist	Sales Data/Warehouse/ Transfer Orders
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product Group	Name	Text	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product Group	Cost Center	Picklist	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product Group	Type	Picklist	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product Group	Description	Text	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product Assignment	Group	Picklist	Sales Data

Setting	Section	Subsection	Field Name	Field Type	Module
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product Assignment	Product	Picklist	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product Assignment	Weight	Number	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product Assignment	Valid From	Date	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Product Assignment	Valid To	Date	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Promo Groups	Period	Picklist	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Promo Groups	OrgUnit	Multi Value	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Promo Groups	Group	Picklist	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Promo Groups	Type	Picklist	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Sales Plan	Product group	Picklist	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Sales Plan	Period	Picklist	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Sales Plan	District	Picklist	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Sales Plan	Representative	Picklist	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Sales Plan	Institution	Picklist	Sales Data

Setting	Section	Subsection	Field Name	Field Type	Module
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Sales Plan	Cost	Currency	Sales Data
Managing Sales Data module settings: brands, product, prices, plans	Sales Data Management	Sales Plan	Amount	Number	Sales Data
Import ready setting of Product Assignments from file	Sales Data Management	Import Product Assignments	Load from file	File	Sales Data
Import ready setting of Product Brands from file	Sales Data Management	Import Product Brands	Load from file	File	Sales Data
Import ready setting of Product Groups from file	Sales Data Management	Import Product Groups	Load from file	File	Sales Data
Import ready setting of Product Prices from file	Sales Data Management	Import Product Prices	Load from file	File	Sales Data/Warehouse/Transfer Orders
Import ready setting of Products from file	Sales Data Management	Import Products	Load from file	File	Sales Data/Warehouse/Transfer Orders
Import ready setting of Promo Groups from file	Sales Data Management	Import Promo Groups	Load from file	File	Sales Data
Import ready setting of Sales Discounts from file	Sales Data Management	Import Sales Discounts	Load from file	File	Sales Data
Import ready setting of Sales Plans from file	Sales Data Management	Import Sales Plans	Load from file	File	Sales Data
Import ready setting of Stock Data from file	Sales Data Management	Import Stock Data	Load from file	File	Sales Data
Import ready setting of Product Assignments from file	Sales Data Management	Import Product Assignments	Load from file	File	Sales Data
Set of tools for loading sales data from external providers (IMS, Farmaprom)	Sales Data Processor	Files, Institutions, Products	Load from file	File	Sales Data
Managing settings of state machine	State Management	State Management	Special Tool	Special Tool	Planner/Transfer Orders/Contracts/Cycle Plan

Setting	Section	Subsection	Field Name	Field Type	Module
Managing Transfer Order module setting: templates, settings	TO Management	Setting	Set of TO module settings	56 different settings	Transfer Order
Managing Transfer Order module setting: templates, settings	TO Management	TO Templates	Name	Text	Transfer Order
Managing Transfer Order module setting: templates, settings	TO Management	TO Templates	Type	Picklist	Transfer Order
Managing Transfer Order module setting: templates, settings	TO Management	TO Templates	FSM	Picklist	Transfer Order
Managing Transfer Order module setting: templates, settings	TO Management	TO Templates	From	Date	Transfer Order
Managing Transfer Order module setting: templates, settings	TO Management	TO Templates	To	Date	Transfer Order
Managing Transfer Order module setting: templates, settings	TO Management	TO Templates	Products	Multi Value	Transfer Order
Managing Transfer Order module setting: templates, settings	TO Management	TO Templates	Presents	Multi Value	Transfer Order
Managing Transfer Order module setting: templates, settings	TO Management	TO Templates	Discounts	Multi Value	Transfer Order
Managing Transfer Order module setting: templates, settings	TO Management	TO Templates	Privileges	Multi Value	Transfer Order
Managing Transfer Order module setting: templates, settings	TO Management	TO Templates	Sales Discount	Multi Value	Transfer Order
Managing Transfer Order module setting: templates, settings	TO Management	TO Templates	Distributors	Multi Value	Transfer Order
Managing Users Update Request if client has his own database of persons & inst	Update Request Management	Request processing	Applicant	Picklist	Search

Setting	Section	Subsection	Field Name	Field Type	Module
Managing Users Update Request if client has his own database of persons & inst	Update Request Management	Request processing	Type	Picklist	Search
Managing Users Update Request if client has his own database of persons & inst	Update Request Management	Request processing	unprocessed only	True/False	Search
Managing Users Update Request if client has his own database of persons & inst	Update Request Management	Request processing	From	Date	Search
Managing Users Update Request if client has his own database of persons & inst	Update Request Management	Request processing	To	Date	Search
Managing Users Update Request if client has his own database of persons & inst	Update Request Management	Request processing	Approve	Button	Search
Managing Users Update Request if client has his own database of persons & inst	Update Request Management	Request processing	Reject	Button	Search
Managing Users Update Request if client has his own database of persons & inst	Update Request Management	Request processing	Comment	Text	Search
Creating, Editing, Deleting User	User Management	Users	First Name	Text	General setting
Creating, Editing, Deleting User	User Management	Users	Last Name	Text	General setting
Creating, Editing, Deleting User	User Management	Users	Gender	Single Value	General setting
Creating, Editing, Deleting User	User Management	Users	Email	Text	General setting
Creating, Editing, Deleting User	User Management	Users	Phone	Text	General setting

Setting	Section	Subsection	Field Name	Field Type	Module
Creating, Editing, Deleting User	User Management	Users	Person Number	Text	General setting
Creating, Editing, Deleting User	User Management	Users	Login	Text	General setting
Creating, Editing, Deleting User	User Management	Users	Password	Encrypted Text	General setting
Creating, Editing, Deleting User	User Management	Users	First Open Day	Date	General setting
Creating, Editing, Deleting User	User Management	Users	Person Type	Text/Number	General setting
Creating, Editing, Deleting User	User Management	Users	Credit Card no.	Text	General setting
Creating, Editing, Deleting User	User Management	Users	Car license no.	Text	General setting
Creating, Editing, Deleting User	User Management	Users	Manager	Picklist	General setting
Creating, Editing, Deleting User	User Management	Users	Org Unit Assignment	Multi Value	General setting
Creating, Editing, Deleting User	User Management	Users	Brick Assignment	Multi Value	General setting
Creating, Editing, Deleting User	User Management	Users	Personal Cost Centers Assignment	Multi Value	General setting
Creating, Editing, Deleting User	User Management	Users	Product Cost Centers Assignment	Multi Value	General setting
Generation database and client for Windows Client users	User Management	Installer Management	Pick User	Picklist	General setting
Generation database and client for Windows Client users	User Management	Installer Management	Schedule	Date	General setting
Generation database and client for Windows Client users	User Management	Installer Management	Reason	Picklist	General setting

Setting	Section	Subsection	Field Name	Field Type	Module
Generation database and client for Windows Client users	User Management	Installer Management	Priority	Number	General setting
Generation database and client for Windows Client users	User Management	Installer Management	Sales Data Since	Date	General setting
Generation database and client for Windows Client users	User Management	Installer Management	Generate Install DVD	True/False	General setting
Allow to restart user password if user forgot it or block account	User Management	Password Change	User	Picklist	General setting
Allow to restart user password if user forgot it or block account	User Management	Password Change	New password	Text	General setting
Settings of password complexity	User Management	Password Complexity	Group name	Text	General setting
Settings of password complexity	User Management	Password Complexity	Characters	Text	General setting
Settings of password complexity	User Management	Password Complexity	Use in current policy	True/False	General setting
Settings of password complexity	User Management	Password Complexity	Minimum characters count	Number	General setting
Settings of password complexity	User Management	Password Complexity	Regular expression	True/False	General setting
Settings of password policy	User Management	Password Policy	Expire Passwords	True/False	General setting
Settings of password policy	User Management	Password Policy	Max password age (Days)	Number	General setting
Settings of password policy	User Management	Password Policy	Warn about expiration in advance	True/False	General setting
Settings of password policy	User Management	Password Policy	Advance warning to change pass (days)	Number	General setting
Settings of password policy	User Management	Password Policy	New users must change pass on first login	True/False	General setting

Setting	Section	Subsection	Field Name	Field Type	Module
Settings of password policy	User Management	Password Policy	Do not allow old password	True/False	General setting
Settings of password policy	User Management	Password Policy	Number of passwords to keep in history	Number	General setting
Settings of password policy	User Management	Password Policy	Lock password after incorrect login	True/False	General setting
Settings of password policy	User Management	Password Policy	Max number of incorrect login attempts	Number	General setting
Settings of password policy	User Management	Password Policy	Time to wait before unlock (minutes)	Number	General setting

5.2 Report Parameters and Formats

To be defined

6 Solution Design Specification

6.1 Software Description

6.1.1 Business Applications

The Inception system comprises the following end-user CRM business applications:

- Tablet Client (native application running on iPad)
- Windows Client (native application running on Windows PCs)
- Web Reports (web client application running in standard web browsers)

These applications serve the needs of [Customer] sales representatives and sales managers.

Each application comprises its own set of modules within the scope of this functional description, which is defined by the various business needs of [Customer] [Country]'s CRM business users.

6.1.1.1 Modules

Assumptions:

1. “Module” means a part of the application user interface comprising a distinct set of functionality and identified as a distinct section of the application by its listing on the main menu. Different modules may share features (distributed functions), such as buttons, lists, hyperlinks, and navigation elements, as well as information. The same data may be presented in more than one section of the user interface.

System Modules are defined by their services. They are described in Sec. 3.2. (System Architecture) and Sec. 6.1.2. (Interfaces).

2. All modules of the Tablet Client are in scope of this application for [Customer] [Country].
3. Windows Client modules in scope have not yet been defined. Their descriptions will be added once the scope has been defined.
4. Web Reports in scope have not yet been defined. Their descriptions will be added once the scope has been defined.
5. AdminTool is described by its configuration options in Sec. 5. Its business features (application components and general behaviors) are not in scope of this functional description.

The modules and functions of the Tablet Client application for iPad are described below.

6.1.1.2 Tablet Client Modules – Functional Specification

The iOS native applications, used by Sales Representatives, runs locally on their tablet devices (iPads) and communicates data through live data connection as well as forced synchronization with the central server, located in Prague, Czech Republic. Reps use this application to access the modules and informational sections described below.

Module	Section or Attribute	Description
Home Screen	General Description	<p>Provides access to all available modules and screens, according to a user's assigned roles within the application, as well as module settings, which are used to enable / disable individual modules, regardless of user access rights.</p> <p>The following modules are accessed from the Home Screen by clicking on their respective menu items (represented by button icons and localized text labels):</p> <ul style="list-style-type: none"> • Search • Update Requests • Planner • Cycle Plan • Orders • Warehouse • Expenses • My Work • Dashboard • Tools • Settings • Messages <p>The Home Screen's features are also replicated in the Sidebar Menu, which can be accessed from anywhere in the application <i>except the Home Screen</i> by clicking on the collapsed menu icon (indicated by three horizontal lines) at the top right of each application screen.</p>
Search	General Description	<p>Search module allows users to find client contacts and view information about customers.</p> <p>It displays biographical and contact data for a specific person or institution, as well as data entered by users (e.g. targeting data, profile and profile value assignments, contact hours, and lists of scheduled and submitted calls, expenses, samples, orders, and non-structured comments).</p> <p>It comprises the following sections, which are discussed individually below:</p> <ul style="list-style-type: none"> • Search List: Displayed on the left side of the screen, it shows a list of customers. These represent variously filtered results of search queries. • Customer Card: Displayed on the right side of the screen (larger pane), it displays information about a specific customer. Load view displays a single pane. Splits into two panes when a subsection is selected.

Module	Section or Attribute	Description
Search	Search List	<p>Search list displays target and non-target customers in the geo units (regions, territories, bricks) assigned to a rep. Each entry in the Search List represents a single customer (“Person” or “Institution”). The default view displays targeted cycle-plan customers only, but the list can be toggled to include non-target customers.</p> <p>Each item on the search list displays a summary of basic identification data about the customer:</p> <ul style="list-style-type: none"> • Print Name or Sort Name • Street address (street name and number) • City <p>The search list can be filtered using three types of filter:</p> <ul style="list-style-type: none"> • Target Group filter (toggle button) • a text-box search filter (text entry field) • combination filter (dialogue box) <p>The search list also contains options for bulk operations:</p> <ul style="list-style-type: none"> • bulk scheduling of customer visits • bulk target group management • bulk change of profiles <p>A numeric indicator at bottom of the search list displays:</p> <ul style="list-style-type: none"> • the total number of customers in the database who match the current filter criteria (query matches) • the number of customers currently displayed, <p>Summary data, filter options, and bulk options available to users are managed by configuration.</p> <p>Screen Contents of the Search List:</p> <ul style="list-style-type: none"> • Filtered and Non-Filtered Customer Lists • Filters • Bulk Action Options • Query Matches
Search	Search List > Filters > Target Group Filter	<p>Filter Type: Toggle</p> <p>Default Position: On</p>

Module	Section or Attribute	Description
Search	Search List > Filters > Text-Box Filter	<p>The customers list can be queried directly using the text box filter at the top of the list. The text box supports the entry of free texts and returns results based on exact character matches. Default configuration queries the following customer data:</p> <ul style="list-style-type: none"> • Print Name or Sort Name • Street address (street name and number) • City <p>Entry of partial words may result in a match.</p>
Search	Search List > Filters > Filter Button	<p>The combination filters is accessed by pressing the “filter” icon (marked by a funnel shape) at the top right of the Search List.</p> <p>The dialogue box displays additional search criteria for filtering the Search List. These are segmented into two main categories, Persons and Institutions, with the following filter criteria available under each:</p> <p>➤ Persons</p> <ul style="list-style-type: none"> • Geo Unit (displays a list of districts / bricks / regions) • Person Type (displays s list of person types) • Specialization (displays list of medical specializations) • Tier (displays primary segmentation options) • Last Visit (displays color-codes that reflect frequency status, grouped number of days (range) since the last visit) • Profiles (displays two drop down fields, each containing a list of all available profile values; the user can select “Or” or “And” to include results matching one or both of the select values). <p>➤ Institutions</p> <ul style="list-style-type: none"> • Geo Unit (displays a list of districts / bricks / regions) • Institution Type (displays s list of institution types) • Tier (displays primary segmentation options) • Last Visit (displays color-codes that reflect frequency status, grouped number of days (range) since the last visit) • Profiles (displays two drop down fields, each containing a list of all available profile values; the user can select “Or” or “And” to include results matching one or both of the select values). <p>The search criteria are managed by configuration.</p> <p>The combination filter contains the following dialogue options for operations that can be applied to the filter:</p> <ul style="list-style-type: none"> • Cancel (cancels the query, closes the dialogue box, and returns the user to the Search List) • Clear (clears the query but keeps the dialogue box open) • Apply (applies the query, closes the dialogue box, and returns the user to the Search List)

Module	Section or Attribute	Description
Search	Search List > Bulk Action	<p>Located at the bottom of the search list, bulk options are enabled by a toggle button labeled “Bulk Action.” The default position of the button is OFF. When the bulk action is switched on, the user can tap multiple items (customers) on the list to select them.</p> <p>This represents a change in the normal behavior of the list. Normally, when a user clicks on an item in the search list, the module displays its details by loading the item’s associated Customer Card in the next pane. When a user turns on Bulk Action, however, the following changes are observed:</p> <ul style="list-style-type: none"> • A plus (+) symbol appears in the center of the list’s footer, to the left of the toggle • A count indicator (red circle with number) appears to the right of the text label “Bulk Action” • The “more” (>) symbols on the right-hand side of each item in the search list is removed. • Clicking on an item adds a check mark, indicating that the item has been selected for further action. • To view details of the customer, the user must swipe with his/her finger across the list item. <p>Switching the Bulk Action toggle into the off position returns the search list to its normal state.</p>
Search	Search List > Bulk Action > Plus (+) button	<p>The plus (+) button, when pressed, displays a menu of options (action items) that can be applied to the List items selected by the user:</p> <ul style="list-style-type: none"> • Schedule Activity • Set Profile Value (out of scope) • Add to / Remove from Target Group (out of scope)
Search	Search List > Bulk Action > Plus (+) button > Schedule Activity	<p>Selecting “Schedule Activity” results in a date selector dialogue that features a date field, activity selection field (picklist), and Save and Close buttons.</p> <p>When clicked, the date field opens a date picker, which has the following options:</p> <ul style="list-style-type: none"> • Date picker feature • Today button (navigates the date picker to the current system date) • Done button (closes the date picker and adds the selected date to the date field) <p>The user can select an activity type from the Activity picklist options, or can use the preselected default activity type. Typical options include the ability to schedule individual visits for each selected customer (default) on the selected date, or to schedule a single group activity for all selected customers.</p> <p>After the user selects a date from the date picker and confirms the activity type selection, the user then clicks either “Save” to schedule the selected items into the Planner or “Cancel” to quit the operation without saving.</p>

Module	Section or Attribute	Description
Search	Search List > Bulk Action > Plus (+) button > Add To / Remove From Target Group	<p>The behavior and text of this function depends on the status of the Target Group Filter:</p> <ul style="list-style-type: none"> • Selecting “Add to Target Group” is possible only when Target Group toggle is switched OFF. • Selecting “Remove from Target Group” is possible on when Target Group toggle is switched ON. <p>When either is selected, a message box appears that asks the user if she/she wants to add or remove (depending on context) the selected entries to or from his/her active Target Group. The user has two options (action items) for users: “Yes” and “No”.</p>
Search	Search List > Bulk Action > Plus (+) button > Set Profile Value	<p>When the user selects Set Profile Value, a dialogue box opens enabling the bulk assignment (= assignment to one or more entities) of profile values. If both Persons and Institutions are selected, the user will be required to set the profile values for each segment separately.</p> <p>1. Normal Operation:</p> <p>The user will set the profile for:</p> <ul style="list-style-type: none"> • {n} selected person(s) • {n} selected institution(s) <p>and will select the Profile from the dropdown list of profile groups. This field is labeled “Profile”. When the Profile is selected, another dropdown field will appear which allows the user to select the specific profile he/she wants to assign from the profile group. This field is labeled “Group.”</p> <p>Profile values are taken from the list of all profile values available in the database.</p> <p>When assigning profiles to both Persons and Institutions: After assigning the profile value to the selected person(s), the user will click “Save” and then select the option for assigned profile values to the selected institution(s). The normal operation described above is repeated for both. When the assignment of profile values is finished, the user press “Save” and then “Close”. Pressing “Close” without saving results in unsaved changes.</p>

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Module	Section or Attribute	Description
Search	Customer Card	<p>Displays basic biographical and contact data for a specific person or institution, as well as data entered by users. The displayed information and visibility of subsections are managed by configuration.</p> <p>2. Screen Contents:</p> <ul style="list-style-type: none"> • Customer Print or Sort Name • Primary Workplace or Address • Phone Number(s) • Targeting Information • Profiles display strip (configurable; default shows primary rating) • Icon strip with operational shortcuts to other modules > subsections with customer data prefilled: <ul style="list-style-type: none"> ○ Planner > Activity Form ○ Orders > Order Form ○ Update Requests > (conditional) ○ Media > Media List (displayed as dialogue) • Contact Hours • Tabs to the following subsections: <ul style="list-style-type: none"> ○ Profiles ○ Recent Activities ○ Warehouse ○ Expenses ○ Orders ○ Notes • Dialogue Buttons: <ul style="list-style-type: none"> ○ Workplaces (displays a list of institutions a person is assigned to) ○ Employees (displays a list of persons assigned to an institution) ○ Call (opens the dialer, OS-native control) ○ Navigate (opens the map; default is Google Maps, integrates Google Maps API controls) ○ Contact Hours Edit (opens the contact hours editor; uses time picker)

Module	Section or Attribute	Description
Search	Customer Card > Shortcuts	<p>A menu of shortcuts represented by a row of icons (icon strip). The icon for each shortcut inherits the icon used for its corresponding module. When pressed, it results in a specific action, as described below for each:</p> <ul style="list-style-type: none"> • Planner Shortcut – opens the Planner module in the state “New Activity” with default activity type, customer name, and o name prefilled. The user must save the activity to add an event to the calendar. • Warehouse Shortcut – opens the Warehouse module in the state “New Transaction” with customer name and Operation prefilled. The user must save the transaction to add an event to the transaction list. • Update Request Shortcut – opens a menu with the following options, variable depending on whether the customer is a Person or Institution: <ul style="list-style-type: none"> ○ Update – opens the Update Request module with customer information prefilled (user edits displayed information to indicated requested changes) ○ Add Workplace – opens the Update Request module in the state “Add Workplace” with the customer’s Position, Specialization(s), and current workplace address prefilled (the user can change address by either selecting another Institution from the database or by filling in new information and replacing current prefilled values) ○ Delete [Person] [Institution] – opens the Update Request module with a confirmation button displayed ○ Delete Workplace – opens the Update Request module with a confirmation button displayed ○ Merge Workplaces – opens the Update Request module with two picklists displayed: Original Workplace (prefilled); New Workplace. The new workplace becomes the master record. ○ Merge Institutions – opens the Update Request module with two picklists displayed: Original Institution (prefilled); New Institution. The new institution becomes the master record. <p>Icon strip contents are managed by configuration. Visibility is based on customer type match, user permissions, and module settings.</p>

Module	Section or Attribute	Description
Search	Customer Card > Profiles	<p>Profiles is a subsection of Customer Card that is accessed via a menu item (tab) that, when pressed, opens a third pane in the Search module UI. It displays a list of profiles and their assigned values, organized by Profile Group. Profiles may be editable by the user (indicated by a blue pencil icon), or locked for editing (indicated by a red pencil icon).</p> <p>The default view shows only profiles “with values,” meaning profiles for which values have been assigned to the customer. A toggle button at the top of the list of profiles allows the user to switch the view to display all available profiles in the database, both assigned and unassigned.</p> <p>Each profile contains two rows. The top row displays the name of the profile, while the bottom row displays the assigned value. Values support alphanumeric text and can be a single character or number, or a line of text. The values themselves are defined in AdminTool by the administrator.</p> <p>There are two types of profile from user standpoint:</p> <ul style="list-style-type: none"> • Profiles that can be edited by the user • Profiles that can only be viewed by the user <p>Clicking on a profile opens a dialogue box that displays both the name and the assigned value (if any) of the profile for the specific customer. A profile that can be edited will display an editable field below the name of the profile. This field can be free text or a picklist, depending on the data type of the profile. Profiles that can only be viewed by the user are read-only, with no possibility to modify text or change the selection of items. Below the list of profiles is a “Done” button that, when pressed, closes the dialogue.</p> <p>The visibility of profiles are managed by configuration. The list of available profiles and their types are managed in AdminTool, in the section Campaigns -> Profiles.</p>

Module	Section or Attribute	Description
Search	Customer Card > Recent Activities	<p>The Customer Card displays a list of all calls logged against a customer in the subsection called "Recent Activities." The subsection displays a summary of each call, and includes the following information:</p> <ul style="list-style-type: none"> • Call Date (DD/MM/YYYY) • Call Type ("Activity Type") • User ("Owner") • Status (indicated by icon). <p>The list is sorted by date, showing the most recent at the top of the list, and the oldest at the bottom. The default view shows only the activities of the user. A toggle button at the top of the list of recent activities allows the user to switch the view to display all activities connected to the customer: both the user's own activities and those of other users who share the same database (= can see the same customer).</p> <p>Clicking on an item on the Call List opens the Planner, where the user can see all details of the call, including the Call Report.</p> <ul style="list-style-type: none"> • For calls for which the user is not the o, and calls that are closed, the user is presented with read-only information, including call Date, Activity Type, Customer, Owner, Plan Note, Call Report, as well as Orders, Warehouse Transactions, and Expenses, if also logged. • For calls for which the user is the o, and which are still in an open/editable state, the user is presented with presented with a read-only summary of the Date, Activity Type, Customer, Owner, and a button that, when pressed, opens the still editable call report ("Edit Call" button). <p>At the bottom of the list of recent activities, the user is presented with a summary of the number of recent activities displayed out of the total available in the database (e.g. N of X-N displayed). Below this summary is a "Done" button that, when pressed, closes the pane.</p> <p>The list of available activities and their types as well as their visibility to users are managed by configuration.</p>

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Module	Section or Attribute	Description
Search, Planner, My Work	Activity Lists > Icons	<p>Activities in Inception fall into two primary categories:</p> <ul style="list-style-type: none"> • Activities requiring an activity report (e.g. call report) • Activities NOT requiring an activity report. <p>Additional categorizations are:</p> <ul style="list-style-type: none"> • Open (=the day on which the activity falls is not closed) • Closed (= the day on which the activity falls is closed) <p>The status of an activity is indicated by an icon, which denotes the specific status of an activity by color and symbol. The following symbols and colors are used to denote status:</p> <p>3. Symbols:</p> <ul style="list-style-type: none"> • Briefcase = scheduled activity • Document = submitted activity report (partial or complete) • No Entry = open status (= the activity is falls on a day which is still open) • Checkmark = closed status (= the activity is falls on a day which is closed) <p>4. Colors:</p> <ul style="list-style-type: none"> • Blue = future • Green = no activity report required • Red = activity report is required but has not been submitted • Orange = activity report is required and has been submitted <p>The above colors and symbols maybe combined as described below, to indicate the total status of a given activity.</p>

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Module	Section or Attribute	Description
Search	Customer Card > Warehouse	<p>Warehouse is a subsection of Customer Card that is accessed via a menu item (tab) that, when pressed, opens a third pane in the UI that displays a list of Warehouse Transactions made on behalf of a specific customer (Person). The default view shows only transactions created by the logged in user. A toggle button at the top of the list of transactions allows the user to switch the view to display all Warehouse transactions in the database for the customer, whether created by the logged in user or by any other users with access to the same customer.</p> <p>The list of transactions is sorted by date, showing the most recent at the top of the list, and the oldest at the bottom.</p> <p>Each entry in the list displays a summary of a specific transaction with the following hierarchy:</p> <ol style="list-style-type: none"> 1. Target (name of the customer to whom the goods were given) 2. No. Items (number of items given) 3. Transaction ID (the unique ID of the transaction) 4. Type (the type of transaction) 5. Owner (name of the user who filled out the transaction record) <p>Clicking on a transaction opens the Warehouse module and displays the details of the selected transaction according to the format and contents of a completed transaction form. This includes, in addition to the above, a table containing a list of transacted goods along with the batch number (SKU), expiration and amount of each good given.</p> <p>At the bottom of the list of transactions is a “Done” button that, when pressed, closes the pane.</p>

Module	Section or Attribute	Description
Search	Customer Card > Expenses	<p>Expenses is a subsection of Customer Card that is accessed via a menu item (tab) that, when pressed, opens a third pane in the UI that displays a list of Expenses recorded against a specific customer (Person or Institution). The default view shows only expenses created by the logged in user. A toggle button at the top of the list of expenses allows the user to switch the view to display all expenses in the database for the customer, whether created by the logged in user or any other users with access to the same customer.</p> <p>The list of expenses is sorted by date, showing the most recent at the top of the list, and the oldest at the bottom.</p> <p>Each entry in the list displays a summary of a specific transaction with the following hierarchy:</p> <ol style="list-style-type: none"> 1. Target (name of the customer to whom the goods were given) 2. Amount (total monetary value recorded) 3. Type (the type of expense) 4. Owner (name of the user who filled out the expense record) <p>Clicking on an expense opens the Expenses module and displays the details of the selected expense record according to the format and contents of a completed expense form. This includes, in addition to the above, any attachments, such as photographs of receipts captured by the user using the device's built-in camera while recording the expense.</p> <p>At the bottom of the list of expenses is a "Done" button that, when pressed, closes the pane.</p>

Module	Section or Attribute	Description
Search	Customer Card > Orders	<p>Orders is a subsection of Customer Card that is accessed via a menu item (tab) that, when pressed, opens a third pane in the UI that displays a list of Orders recorded against a specific customer (Institution). The default view shows only orders created by the logged in user. A toggle button at the top of the list of orders allows the user to switch the view to display all orders in the database for the customer, whether created by the logged in user or any other users with access to the same customer.</p> <p>The list of orders is sorted by date, showing the most recent at the top of the list, and the oldest at the bottom.</p> <p>Each entry in the list displays a summary of a specific order with the following hierarchy:</p> <ol style="list-style-type: none"> 1. Date (when the order was created) 2. Institution (name of the customer to whom the goods were given) 3. Distributor (name of distributor who delivered the goods) 4. Order Template (template used by the user to create the order) 5. Total (total monetary value recorded) 6. Owner (name of the user who filled out the order) 7. Status (order processing status: states are managed by configuration according to prepared workflows) <p>Clicking on an order opens the Orders module and displays the details of the selected order record according to the format and contents of a completed order form and order template.</p> <p>At the bottom of the list of Orders is a “Done” button that, when pressed, closes the pane.</p>

Module	Section or Attribute	Description
Search	Customer Card > Notes	<p>Notes is a subsection of Customer Card that is accessed via a menu item (tab) that, when pressed, opens a third pane in the UI that displays a list of notes recorded against a specific customer (Person or Institution). The default view shows all notes, whether created by the logged in user or any other users with access to the same customer.</p> <p>The list of notes is sorted by date, showing the most recent at the top of the list, and the oldest at the bottom.</p> <p>Each entry in the list displays a summary of a specific order with the following hierarchy:</p> <ol style="list-style-type: none"> 1. Date (when the note was last modified) 2. Owner (name of the user who created the note) 3. Abbreviated Text (first several characters of the note text, on a single line; indicated by ellipsis if truncated) <p>Clicking on a note opens a dialogue containing the following:</p> <ul style="list-style-type: none"> • Owner • Type (type of note) • Date (creation date) • Change Date (date of last modification) • Content (note text) <p>At the bottom of the list of Notes is a “Done” button that, when pressed, closes the pane.</p>
Search	Customer Card > Contact Hours	<p>A table in the Customer Card that displays the available open and/or visiting hours of the customer.</p> <p>The table contains three columns and five rows under the heading “Contact Hours” (blue label text):</p> <ul style="list-style-type: none"> • The first column lists the days of the week, with the day starting the week at the top (row 1) and the day ending the week at the bottom (row 5) • The second column lists the times from/to that the customer can be visited in the morning (AM) • The third column lists the times from/to that the customer can be visited in the afternoon (PM) <p>Editing the contact hours is done using the Contact Hours Editor which is accessed by pressing the “Edit” button below the table.</p>

Module	Section or Attribute	Description
Search	Customer Card > Contact Hours > Contact Hours Editor	<p>Clicking the “Edit” button below the Contact Hours table opens a dialogue box containing the Contact Hours Editor.</p> <p>In the editor, each time slot is an editable field that, when pressed, opens a time selector (an OS-native component).</p> <p>By default, the times can be selected in 30 minute increments (--:00, --:30) with the ability to set two distinct time ranges (from/to) per weekday.</p> <p>The following validation applies within a given time range (from/to): the time <i>from</i> must precede the time <i>to</i>.</p> <p>There is no validation in terms of AM/PM division – a user can enter two separate morning times, or afternoon times, for a given day. The purpose of having two time columns is simply so that the user can indicate two separate time periods of availability in a given day. The division of AM vs. PM is by custom rather than by rule.</p> <p>When the user is finished entering the times, the user presses the “Save” button at the top right of the dialogue box. Clicking “Save” closes the dialogue box.</p> <p>If the user wishes to close the dialogue box without saving any changes, the user must click “Cancel” located at the top left of the dialogue box.</p> <p>After saving his/her changes, the times in the table will be updated to reflect the user’s saved inputs. These data are visible to all other users who share the same customer.</p>

Module	Section or Attribute	Description
Update Request	General Description	<p>Update Requests module allows users both to request the addition of new customer records to the master database, and to record and review changes to existing customer records. The module displays the approval status (“state”) of a given request.</p> <p>The module functions according to pre-defined workflows and conditions (module settings).</p> <p>The user can perform the following tasks using this module:</p> <ul style="list-style-type: none"> Review previous updates / update requests – view changes and current status of submitted requests Create new customer records (Persons, Institutions) – add new customers to the database by filling out information for them Update current customer records – update current customers contact information and account status (as configured) <p>Update Requests comprises the following sections, which are discussed individually below:</p> <ul style="list-style-type: none"> Update Request List Update Request Form <p>What follows is a generic description based on default configuration allowing the user to record changes to customer records (e.g. name, position, phone number, workplace, etc.) and submit those changes for approval, following standard industry practices.</p>
		<p>The Updates List displays a list of customer data change requests, searchable by date, submitted by the user. In date view (default) the list orders the requests by date, with the most recent at the top.</p> <p>Each update in the list contains three rows displaying the following information for a particular update:</p> <ul style="list-style-type: none"> Target – the customer (Person or Institution) State – the status of the request (Submitted, Approved, Declined) Date From – submission date of the current status (last change date) <p>Tapping on a particular entry displays detailed information about that update request, which appears in the right pane of the screen. The specific contents of update request details differ for persons and institutions.</p>

Module	Section or Attribute	Description
Update Request	Update Request List > View Options	<p>The Updates List displays the following presentation options:</p> <ol style="list-style-type: none"> Date View Shows all updates from the selected date until the current date (default selected date = the current date). Entries are sorted by date from oldest to most recent, with items grouped by date (e.g. dd/mm/yyyy). The date header for each group of entries also contains only the date. State View Shows all updates from the selected date (default = current date) grouped into by State. There are three states that reflect the workflow of a standard approval process from the user's point of view: <ul style="list-style-type: none"> Submitted – by user to database administrator with the role: update request processor Approved – by administrator, with the result that the master record has been changed Declined – by administrator, with the result that the master record has not been changed
Update Request	Update Request Form	<p>The Update Request Form allows the user to request new customer additions to the database, and record data change requests for existing customers.</p> <p>There are four forms, which can be selected by pressing the plus “+” icon at the top right of the Updates List:</p> <ol style="list-style-type: none"> New Person – results in the creation of a new Person New Institution – results in the creation of a new Person Merge Workplaces Merge Institutions <p>These are detailed separately in the following sections.</p> <p>To update an existing customer record, the user must find the customer whose details they wish to update using the Search module. In the customer card, they can select from the available options displayed after clicking the Update Requests shortcut.</p> <p>The request form will be one of the above-listed, depending on the option selected.</p>

Module	Section or Attribute	Description
Update Request	Update Request Form > New Person	<p>New Person allows the user to request the creation of a new customer record for an individual professional (e.g. doctor, nurse, pharmacist). There are three individual information sections that must be completed for Persons:</p> <ul style="list-style-type: none"> • Person – biographical information about the person (first name, last name, gender, etc.) • Workplace – professional contact information (company, address, work phone) • Note – the reason for the update (required if submitting an update as request) <p>For each information section, a range of information is requested. The user can choose between filling in only Required fields, or view all available fields, using a toggle (Required < > All). The fields for each information section are described the Forms and Interactions section of this document.</p>
Update Request	Update Request Form > New Institution	<p>New Institution allows the user to request the creation of a new customer record for an individual business (e.g. pharmacy, clinic, hospital).</p> <p>A range of information is requested. The user can choose between filling in only Required fields, or view all available fields, using a toggle (Required < > All). The fields for each information section are described the Forms and Interactions section of this document.</p>
Update Request	Update Request Form > Merge Workplaces	<p>Merge Workplace allows the user to request the merging institution assignments for two customers (Persons). The subsection of the UI displays two picklists (dialogue). The content of each picklist is the list of persons in the customer database. The user selects the persons whose workplace records (institution assignments) will be merged:</p> <ul style="list-style-type: none"> • Original Workplace – the person whose institution assignment is being changed • New Workplace – the person whose institution assignment is being adopted
Update Request	Update Request Form > Merge Institutions	<p>Merge Institution allows the user to request the merging of two Institutions. The subsection of the UI displays two picklists (dialogue). The content of each picklist is the list of institutions in the customer database. The user selects the institutions whose records will be merged:</p> <ul style="list-style-type: none"> • Original Institution – the institution being changed • New Institution – the new master record

Module	Section or Attribute	Description
Planner	General Description	<p>The Planner module, used for planning and reporting activities, provides the user with ability to view both their activity history and upcoming scheduled activities. Planner enables the user to plan from a range of pre-defined activities, search their activities in the calendar, and link them with particular customers. A user of the Tablet Client with the role “Representative” is only able to see their own Planner. DMs who have appropriate rights can view the Planners of their subordinate users in the same line using the Planner module in the Windows Client application.</p> <p>The Planner displays a split screen view (2 or 3 panes) with the following sections displayed in each, depending on user actions:</p> <ul style="list-style-type: none"> • Calendar • Activity List • Activity Form • Cycle Plan Scheduler • Activity Report <p>The Main Menu of the Planner offers the user several options. The associated views are described above:</p> <p>5. Display Cycle Plan (via Cycle Plan button)</p> <p>The Cycle Plan button opens a new view within Planner, showing the user his/her current Cycle Plan. The user can add items from the Cycle Plan to the Activity List (= plan visits to Cycle Plan customers) by selecting a date in the Calendar and swiping over the Cycle Plan item the user wants to add to that date.</p> <p>6. Search Activity List (via Extended Activity List button)</p> <p>The Extended Activity List button extends the view of the Activity List to fill the entire left pane of the screen, replacing the calendar with an Extended Activity List. The Extended Activity List contains a date and keyword search field.</p> <p>7. Display Route for Day (via Map button)</p> <p>The Map button opens a view of Google Maps displaying the locations of all customers in the Activity List for the selected date as well as the user’s current location. The user can press the “Get Directions” button above the map (top right) to display an optimized route for all locations displayed on the map, starting with the user’s current location.</p> <p>8. Add New Activity (via plus “+” button)</p> <p>The Plus button opens a new Activity Form, which the user can use to plan a new activity.</p>

Module	Section or Attribute	Description
Planner	Calendar	<p>Displays a month-view calendar with the current day (“Today”) highlighted in red, selected day highlighted in light blue and the First Open Day highlighted in dark blue. Selecting a day populates the Activity List with a list of all planned and/or completed activities for the day. The list is limited to a single date.</p> <p>The user has two navigation options in the Calendar:</p> <ul style="list-style-type: none"> • Today – selects the current date • First Open Day – selects the first open date
Planner	Activity List	<p>The Activity List displays all activities scheduled by the user, both upcoming and previous. Each activity entry contains a summary of information within the list, as well as extended information which can be seen, after clicking, on the Activity Form. The summary includes the following information: Call Date (DD/MM/YYYY), Call Type, Address, and Status (indicated by icon).</p> <p>Clicking on an item on the Activity List opens the related Activity Form, where the user can see all details of the call and access/view any linked Call Report.</p> <p>The Activity List itself has two views: (a) “Calendar” view, and (b) “Extended Activity List” view:</p> <ol style="list-style-type: none"> In Calendar view, the Activity List displays a list of all activities created by the user for a given day, selected by pressing on a date on the Calendar. In this view, the Activity List only displays activities for a single day. In Extended Activity List view, the Calendar is replaced with two search filters: the first is a date search field that allows the user to search all activities from a selected date, and a free text search bar that allows the user to filter the list by entered text. <p>At the bottom of the Activity List are bulk options, enabled by a toggle. The user can use the following options to perform bulk actions for selected entries in the Activity List:</p> <ul style="list-style-type: none"> • Copy – duplicates the selected activities to another date without removing the activity from the source date • Move -- duplicates the selected activities to another date while removing the activity from the source date

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Module	Section or Attribute	Description
Planner	Activity List > Extended Activity List	<p>The extended activity list shows all activities for a searched person or institution (if filter is applied) from the selected date (default is always the current date), and is not limited to a single date (period displayed = 30 days from selected date). Activities in the list are grouped under a common date heading (e.g. mm/dd/yyyy, according to date format of the device).</p> <p>To activate the Extended Activity List, click the magnifying glass icon in the Planner's Main Menu. Users filter the list by entering text into the search field. The system queries the list of keyword matches, searching all text listed in the Activity List.</p> <p>Valid keywords include:</p> <ul style="list-style-type: none"> • Person Last Name • Institution Full Name <p>In this way, users can find specific customers with whom they've planned visits and other activities.</p>

Module	Section or Attribute	Description
Planner	Activity List > Bulk Action	<p>The Bulk Action toggle button results in three changes to the UI of the Activity List:</p> <ol style="list-style-type: none"> 1. A plus (+) symbol appears in the center of the footer, to the left of the toggle 2. A counter (red circle with number) appears to the right of the text label “Bulk Action” 3. The “more” (>) symbols on the right-hand side of each item in the List of Search Results disappears <p>Switching the Bulk Action toggle into the off position returns the Activity List to its normal state.</p> <p>The plus (+) button, when pressed, displays a menu of options (action items) that can be applied to the List items selected by the user:</p> <ul style="list-style-type: none"> • Copy (= duplicate the selected activity on another date without removing the activity from the source date) • Move (= duplicate the selected activity on another date while removing the activity from the source date) <p>Tapping on a List item places a green checkmark at the end of its contained region (where the “more” (>) symbol was previously) indicating that the item has been selected for further action.</p> <p>Selecting “Copy” or “Move” results in a date selector dialogue that features a date field. The user selects a date from the date picker and then clicks either “Save” to schedule the selected items into the Planner (with same activity type) or “Cancel” to quit the operation without saving.</p> <p>The date picker itself has two options (in addition to “Cancel”) determining its behavior:</p> <ul style="list-style-type: none"> • Today (which navigates the date picker to the current system date) • Done (which closes the date picker and adds the highlighted date to the Date field in the date selector dialogue)

Module	Section or Attribute	Description
Planner	Activity Form	<p>The Activity Form is used to enter the basic information required to save an activity to the Planner, which it then displays in editable or read-only form, depending on the status of the activity as either open or closed. This includes:</p> <ul style="list-style-type: none"> • Date (required) • Time from/to (optional) • Owner (pre-filled) • Activity type (selected by user from list of options) • Activity weight (contextual, depending on activity type) • Customer (contextual, depending on activity type) • Note (optional, if enabled by settings) <p>Below the Activity Form are several buttons: “Save”, which saves the Activity Form and enters it into the Activity List; “Report Call” (active only for activities requiring a call report); and “Delete”, which resets the Activity Form and removes the saved activity from the Activity List.</p> <p>Users can schedule any activity type available to them based on their system roles and associated permissions. The following general restrictions apply:</p> <ul style="list-style-type: none"> • Activity Type must be available to the user by admin assignment (managed in AdminTool, section Campaign Management, subsection, Activities) • Activity Type must match Customer Type (e.g. the user cannot schedule a Customer Visit for a Pharmacy, or a Pharmacy Visit for a Doctor) • Activity must fall on an Open Day (users cannot schedule new activities on Closed Days)
Planner	Activity Form > Customer Information Button	<p>The Planner allows the user to view customer information without leaving the Planner module or closing the Activity Form. The user presses the blue info button to open a view of the customer’s information (in a third pane, right) taken directly from the Customer Details card for a given Person or Institution customer.</p>
Planner	Activity Form > Activity Summary	<p>The Planner displays a summary of completed activity reports (questionnaire) directly in the activity form after the activity has been submitted. The Activity Form will also display summaries of any completed Warehouse Transactions, Orders, and Expenses submitted against the customer on the same date. The contents of these summaries are described in the relevant subsections of section 6 of this document (“Fields and Interactions”) relating to the specific modules from which they are drawn.</p>

Module	Section or Attribute	Description
Planner	Cycle Plan Scheduler	<p>After clicking the Cycle Plan button, the Planner interface replaces the Activity Form (default view) with the Cycle Plan Scheduler, which displays the user's current (active) cycle plan as a list of customers and allows the user to "drag and drop" customers onto the Activity List. The scheduler lists one customer per row.</p> <p>The row displays the customer's print name, primary workplace address, and five set of values, each indicated by a status abbreviation and whole number value, that together indicate the customer's total status within the user's cycle plan, relative to the user's personal objectives.</p> <p>The displayed abbreviations and their definitions are described below, in the order in which they are displayed on the row, from left to right:</p> <ul style="list-style-type: none"> • S = Submitted (number of submitted calls in the cycle) • T = Targeted (call frequency objective for the cycle, per customer) • NS = Not-Submitted (number of calls that have been planned but not submitted in the cycle) • R = Remaining (number of calls that have not been submitted, both planned and unplanned (calculated as T-S)) • RS = Remaining to be Scheduled (number of calls remaining to be planned (calculated as $[T - (S + NS)]$)) <p>After the Cycle Plan is loaded, the user simply has to select a date from the Calendar (by tapping on the desired date) and then swipe either left-to-right (LTR) or right-to-left (RTL) on a Cycle Plan entry to add it to the Activity List for that date. Once a customer is added to the Planner, their Remaining Frequency (RS) is lowered to reflect the remaining number of visits that still need to be planned.</p> <p>To report a call for scheduled customer, the user must return to the Activity Form. The user can do this by clicking the calendar icon above the cycle plan list, or by clicking on the customer whose entry in the Activity List the user wants to report.</p>

Module	Section or Attribute	Description
Planner	Activity Report > Reporting Conditions	<p>Activity Reporting (incl. Call Reporting) is a function embedded within Planner that allows users to access and select specific questionnaires to fill out in order to report an activity Open Activity with no Activity Report completed yet.</p> <p>There are two main flows for accessing Activity Reports:</p> <ul style="list-style-type: none"> • Creating New Activity Reports <p>When the user presses “Report Call” the user is directed to a list of available questionnaires. The contents of the list are all Call Report templates that are available based on the following conditions (set in AdminTool > Campaign Management):</p> <ul style="list-style-type: none"> • User Types • Org. Units • Activity Types • Specializations • Person Types • Institution Types • Call Rank (=Visit No. in Cycle) <p>This means that the availability of a particular questionnaire depends on a positive match for a particular Person (with defined type and specialization) or a particular Institution (with a defined type) and particular user (with a defined type) as well as the order of the particular visit in the sequence of all visits (i.e., whether it is the first, second, third, etc. visit during the cycle for which the campaign is valid).</p> <ul style="list-style-type: none"> • Editing Existing Activity Reports <p>When a user presses the “Edit” button, the user skips the list of questionnaires and is directed to the questionnaire already selected and filled out. This happens regardless of whether the Activity Report is “finished” (= the questionnaire is completely filled out and the user has already pressed “Finish CR” to indicate its completion; “Finish CR” button only appears when all conditions for completing the Activity Report have been met) or is incomplete. Once a questionnaire is selected, it is not possible to select another questionnaire for the same activity.</p>

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Module	Section or Attribute	Description
Planner	Activity Report > Questionnaire Selection	<p>When users report a scheduled activity, they are presented with a selection of call questionnaires (call scripts) from which they can prepare and submit Activity Reports. The system automatically selects the available questionnaires from the database of all questionnaires and presents them as a list. To proceed to questionnaire complete, the user clicks on an item on the list.</p> <p>The user can submit a call report against any customer, or report any activity requiring a submitted activity report. The following general restrictions apply:</p> <ul style="list-style-type: none"> • Activity cannot be in the future • Activity must require an Activity Report • A questionnaire must be available for the activity • The activity must fall on an Open Day

Module	Section or Attribute	Description
Planner	Activity Report > Questionnaire	<p>A standard questionnaire contains only textual questions and answer choices. Questions are created as free text (max. 2000 characters), while the answers choices (values) depend on the “Question Type” selected.</p> <p>The following question types are available:</p> <ul style="list-style-type: none"> • Whole Number • Decimal Number • Date • Drop Down • Multi Value • Sorting List • Free Text <ul style="list-style-type: none"> • Completing a Questionnaire <ol style="list-style-type: none"> 1. All questions in a questionnaire are either mandatory or optional, depending on their settings. The administrator uses a checkbox to indicate whether a question is mandatory or optional in AdminTool. A similar checkbox is used to indicate the “Final” question in the sequence. 2. To proceed through a sequence of questions, the user presses the “Next” button. Validation checks to see that the conditions of the previous question have been met before allowing the user to proceed to the next question in the sequence. 3. If validation accepts the answer provided, the user is allowed to proceed and the “Next” button disappears and is replaced by an “Accept” button. The purpose of the “Accept” button is to allow the user to return to a previous question and change his/her answer, and then accept that change. However, because questionnaire sequences are conditional, accepting a change results in the deletion of all subsequent answers since the previous conditional sequence is no longer valid. 4. When the user reaches the final question in the sequence, the “Done” button at the top right of the questionnaire is replaced with a “Finish CR” button, indicating the all conditions for completing the questionnaire (and specifically, the validation of the last question in the questionnaire) have been met.
Planner	Navigation / Map	<p>To view the locations of all planned activities for a given date, the user must select a date from the Calendar and press the Map button, located in the Main Menu of the Planner. A map view (embedded Google Map) will open showing all locations from the Activity List for the selected date, as well as the user’s own location. Pressing the “Get Directions” button generates a route (from Google’s “Traveling Salesman” API) optimized according the location of the user and the locations of the planned activities. To close the map, the user presses the “Cancel” button.</p>

Module	Section or Attribute	Description
Cycle Plan	General Description	<p>The Cycle Plan module represents the plans of a specific Rep for his/her customer Target Group within a Cycle. It displays, per customer, the Tier (segmentation, defined per line) and Frequency (target number of visits, defined per rep) for each target customer in the user's Cycle Plan.</p> <p>The module also contains the following data for the Cycle Plan:</p> <ul style="list-style-type: none"> • Cycle Name • Active Period (= validity dates from / to) for the Cycle • Change Deadline (= last date changes can be made) • Current Status (= approved by DM, or pending approval) <p>Its operations are based on the following presumptions:</p> <ol style="list-style-type: none"> 1. Cycle is defined as a defined business period of fixed length (e.g. one month) 2. Target Group is defined as a sub-set of customers in a Rep's database that (typically) represents the individuals with the highest potential for generating sales; the size of the Target Group reflects the call capacity of the user 3. Tier is defined as the primary segmentation profile value assigned to a customer 4. Frequency is defined as number of calls to the customer the user plans to make during the cycle 5. Call Capacity is calculated as: Call Rate * Total Available Working Days; call capacity fulfillment is calculated by dividing the sum of visits for all target group customers (total visit count) by the call capacity (visit objective). <p>Cycle Plans are displayed as a list of customers, with one customer listed per row. The row displays the customer's print name, primary workplace address, current cycle Tier and Frequency, and next cycle Tier and Frequency. Both Tier and Frequency can be edited by the user, or locked for editing via configuration.</p> <p>A picklist allows the user to select the user's current, future and previous cycle plans, which are then displayed in the list.</p>

Module	Section or Attribute	Description
Cycle Plan	Cycle Plan List	<p>The list displays a single, full-frame view of customer information that contains the following information for each customer:</p> <ul style="list-style-type: none"> • Print Name • Street Address • Current Tier • Proposed Tier – optionally editable by user • Current Frequency • Proposed Frequency – optionally editable by user • DM Comment – post-review, if user changes are permitted <p>Above the list of customers, the module displays the following information about the displayed cycle:</p> <ul style="list-style-type: none"> • Cycle Selection <p>Discussed below in Cycle Plan Options</p> <ul style="list-style-type: none"> • Period <p>The Period information for the current (or displayed) Cycle Plan is located to the right of the Cycle name. It displays the validity dates (from / to) for the displayed Cycle, and by default displays the period of next / up-coming Cycle.</p> <ul style="list-style-type: none"> • Change Request Deadline <p>Located to the right of the Period information, the Change Request Deadline is the last date changes can be made for the next cycle. It is the cutoff date for both reps and DMs, so users who submit their change requests late risk not getting them approved by the DMs on time. It uses the following format: Editable until: MM/DD/YYYY</p> <ul style="list-style-type: none"> • Current Status <p>The Current Status indicates whether the requested changes to the Cycle Plan have been approved by the DM. Approval refers to the state a Cycle Plan is in after the DM has reviewed (and possibly modified) information and submitted formal approval using the Windows Client application.</p>

Module	Section or Attribute	Description
Cycle Plan	Cycle Plan Options	<ul style="list-style-type: none"> • Cycle Selection <p>By default, the cycle plan for the next cycle is displayed when the user opens the module because preparing for the next cycle is a key responsibility of the user during the current cycle, and represents the current focus of current planning work.</p> <p>However, the user can view his/her current active or previous cycle plans by clicking on the name of the Cycle (top left), which opens a pick list. Clicking on an item in the picklist loads the Cycle Plan.</p> <ul style="list-style-type: none"> • Show only current changes: <p>A toggle button allows the user to see only those customers whose Tier and/or Frequency have been edited (as permitted).</p>
Warehouse	General Description	<p>The Warehouse module is used to manage the assignment of stock (promotional goods) to customers, applying configurable business rules to ensure legal / regulatory and business compliance.</p> <p>The module displays a list of all Warehouse Transactions made by the user as well as the user's inventory of assigned stock (samples and other promotional materials).</p> <p>The system keeps a record of all goods assigned to a user, and all goods assigned to customers. Controls may be activated, via configuration, limiting the total quantity of stock (by specific good, or overall) that can be given to a customer (by individual user, or all users) within a defined period.</p> <p>The Warehouse module contains the following sections:</p> <ul style="list-style-type: none"> • Transaction List • Stock List • Transaction Form <p>Each section is described individually below.</p>

Module	Section or Attribute	Description
Warehouse	Transaction List	<p>The default view of the module presents the Transaction List to the left of the Transaction Form.</p> <p>The list of transactions is sorted by date, showing the most recent at the top of the list, and the oldest at the bottom.</p> <p>Each entry in the list displays a summary of a specific transaction with the following hierarchy:</p> <ol style="list-style-type: none"> 1. Target (name of the customer to whom the goods were given) 2. No. Items (number of items given) 3. Transaction ID (the unique ID of the transaction) 4. Type (the type of transaction) <p>The owner is always the logged-in user.</p> <p>Clicking on a transaction displays the details of the selected transaction in the Transaction Form according to the format and contents of a completed transaction form. This includes, in addition to the above, a table containing a list of transacted goods along with the batch number (SKU), expiration and amount of each good given.</p> <p>The list can be filtered by date, using the date picker at the top of the list. The date selected is always “Date From” and the list displays all transactions from the selected date. The date picker uses OS-native components for date selection.</p>
Warehouse	Stock List	<p>A sigma icon (Σ) above the date picker, to the right of the module name, opens the Stock List.</p> <p>The Stock List displays a list of all assigned goods and their quantity, grouped by category (e.g. brand). For each entry, the following information is displayed:</p> <ul style="list-style-type: none"> • Name of good (text string) • SKU (text string) • Remaining quantity (numeric value) <p>When a good is assigned to a customer using the transaction form, the quantity is reduced. Stock is assigned to users using the Warehouse module of the Windows Client application.</p> <p>A magnifying glass icon (located where the sigma icon was) returns the user to the Transaction List.</p>

Module	Section or Attribute	Description
Warehouse	Transaction Form	<p>To create a new transaction the user clicks the plus (+) button at the top of the Transaction List. This opens a blank Transaction Form.</p> <p>The Transaction Form comprises fields for date selection (date picker), customer selection (Persons and Institutions), and goods selection.</p> <ul style="list-style-type: none"> • Date <p>The default date is always the current date, but the user can record a transaction for another date by using the date picker (OS-native component).</p> <ul style="list-style-type: none"> • Customer Selection <p>Customer selection is managed by clicking on the icons for Person and/or Institution.</p> <p>Clicking these opens a dialogue displaying a list of customers in the user's current active target group (cycle plan) (default list), a toggle filter that when switched allows the user to see all entities of a particular type in the user's assigned regions (Person, Institution), and a text box filter for typed queries. Filtering rules are the same as those described for the Search List text filter.</p> <p>The user may be able to select multiple targets for a single transaction, per configured business rules. At least one customer must be selected to proceed to product selection.</p> <p>Details of a selected customer can be viewed after saving by opening the Customer Card (in a third pane), which is access by clicking the Customer Information Button ("i") to the right of each customer entry.</p> <ul style="list-style-type: none"> • Product Selection <p>Product selection is access by clicking the "Select Products" button. A new screen displays a list of all available goods that may be selected.</p>
Warehouse	Transaction Form > Customer Information Button	<p>The Planner allows the user to view customer information without leaving the Warehouse module or closing the Transaction Form. The user presses the blue info button to open a view of the customer's information (in a third pane, right) taken directly from the Customer Card for a given Person or Institution.</p>

Module	Section or Attribute	Description
Warehouse	Transaction Form > Product Selection	<p>For each good listed on the Product Selection screen, the following information is provided:</p> <ul style="list-style-type: none"> • Brand – read-only • Product – read-only • Batch Number – read-only • Price – read-only • Expiration – read-only • Amount – editable <p>The Amount field is a numeric value selector that allows the user to directly type numeric values into the entry field, or specify the amount by clicking the plus (+) and (-) buttons on either side of the entry field.</p> <p>The user is prevented from entering higher amounts than are permitted for a given good or goods (based on business rules) by field validation, which is performed by the system at the server level. Business rules can include budgetary, marketing, and regulatory conditions which together inform the system logic for product selection. These are detailed below.</p> <p>When the user is finished selecting products and amounts, the user presses “Submit” to complete the transaction. After submission, the transaction appears in the Transaction List.</p> <ul style="list-style-type: none"> • Editing a Transaction: <p>The user can edit a given transaction by pressing the “Edit” button at the bottom of the Transaction Form. The user is presented with a summary of all selected goods. The user can adjust the amounts as needed for each good, or can add additional goods to the transaction.</p> <p>Clicking “Add New” opens a list of unselected goods. The user taps an item to select it (indicated by a checkmark) then clicks “Continue” to proceed to amount selection. The newly selected goods are added to the product selection screen and the user can indicate the desired amounts using the controls described above. The user then clicks “Submit” to resubmit the transaction with the changes saved.</p> <p>Transactions are editable by the user during Open Days, but are locked for editing once a day is closed.</p>

Module	Section or Attribute	Description
Warehouse	Transaction Form > Product Selection > Validation	<p>Using Period as the primary validation control against which all restrictions and conditions are validated, the system checks, per assigned item:</p> <ul style="list-style-type: none"> • The total amount of a good in stock • the total amount of a good assigned by the user overall • the total amount of a good assigned by the user to the selected customer(s) • the total amount of a good assigned by all users to the selected customer(s) • the total amount of all goods assigned by all users to the selected customer(s) <p>To complete a transaction, the following restrictions apply:</p> <ul style="list-style-type: none"> • the user must have a sufficient quantity of a good in stock • the user cannot exceed the total amount of stock they are allowed to assign • the user cannot exceed the total amount of stock a customer is allowed to receive
Orders	General Description	<p>The Orders module is used to manage the creation of pharmacy sales orders (both direct and transfer orders) to Institution customers, applying configurable business rules and conditions to ensure business compliance by users.</p> <p>The module displays a list of all orders made by the user as well as the details of each order.</p> <p>Additionally, the system keeps a record of all orders created by a user, and all orders created for customers as well as their status.</p> <p>Controls may be established, via template creation, limiting the total quantity of discounts, rebates, and free pieces (by specific ordered good, or combination of goods) that can be given to a customer within a single order. Conditions for such limits may be set according to the type, quantity, or the total value of goods being ordered.</p> <p>The Orders module contains the following sections:</p> <ul style="list-style-type: none"> • Orders List • Order Form • Order Template <p>Each section is described individually below.</p>

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Module	Section or Attribute	Description
Orders	Orders List	<p>The Orders module presents the Orders List to the left of the Orders Form.</p> <p>The list of orders is sorted by date, showing the most recent at the top of the list, and the oldest at the bottom.</p> <p>Each entry in the list displays a summary of a specific order with the following hierarchy:</p> <ol style="list-style-type: none"> 1. Date (when the order was created) 2. Institution (name of the customer to whom the goods were given) 3. Distributor (name of distributor who delivered the goods) 4. Order Template (the template used by the user to create the order) 5. Total (the total monetary value recorded) 6. Owner (name of the user who filled out the order) 7. Status (order processing status: states are managed by configuration according to prepared workflows) <p>The owner is always the logged-in user.</p> <p>Clicking on an order displays the details of the selected order in the Order Form according to the format and contents of a completed order form. The Order Form is described in detail below.</p> <p>➤ Filters:</p> <p>The Orders List can be filtered by date, using the date picker at the top of the list. The date selected is always “Date From” and the list displays all transactions from the selected date. The date picker uses OS-native components for date selection.</p> <p>The Orders List can also be filtered by selecting from the Filter options, accessed by clicking on the Filter icon located above the Orders List. Filter options are displayed via dialogue. Its operations are described below.</p>

Module	Section or Attribute	Description
Orders	Orders List > Filters	<p>The user can filter the list of orders by the following criteria:</p> <ul style="list-style-type: none"> ➤ Status – supports three default options: <ul style="list-style-type: none"> ○ New ○ Sent ○ Deleted ➤ Distributors – list of distributors in the database ➤ Templates – list of templates available to the user in the system, including previously active templates no longer used <p>Clicking on a filter item (criteria) selects it. Selection is indicated by a checkmark. The dialogue has the following commands:</p> <ul style="list-style-type: none"> • “Back” returns the user to main menu of filter options. • “Clear” clears the selection. • “Apply” applies the selection and closes the dialogue. • “Cancel” clears the selection and closes the dialogue.

Module	Section or Attribute	Description
Orders	Order Form > New	<p>To create a new order the user clicks the plus (+) button at the top of the Orders List. This opens a blank Order Form. The Order Form comprises the following fields, which must be completed in the order presented below. Field options are dependent on the conditions of the previous field.</p> <ul style="list-style-type: none"> • Date <p>The default date is always the current date, but the user can record an order for another date by using the date picker (OS-native component).</p> <ul style="list-style-type: none"> • Institution <p>Customer selection is managed by clicking on the field for Institution, which opens a dialogue displaying a list of Institutions in the user's current active target group (cycle plan) (default list), a toggle filter that when switched allows the user to see all Institutions in the user's assigned regions, and a text box filter for typed queries. Filtering rules are the same as those described for the Search List text filter.</p> <ul style="list-style-type: none"> • Contact <p>Clicking the field for Contact opens a dialogue containing a text box and list of previously entered contacts. The user can create a new contact based on the pharmacist who takes the order. There is no validation for this field. The dialogue remembers all contacts entered for an institution, regardless of who enters them, and makes this list available to all users creating orders for the same institution. The contact is used only as a reference. Orders are recorded against the institution's customer record.</p> <ul style="list-style-type: none"> • Template <p>Clicking the template field opens a dialogue containing the list of available templates. Only one template may be selected at a time.</p> <ul style="list-style-type: none"> • Distributor (2x) <p>Clicking the Distributor field opens a dialogue containing the list of available distributors. The user may select more than one distributor (max two), but at least one must be selected to proceed to template completion.</p> <ul style="list-style-type: none"> • Customer ID (2x) <p>For each distributor selected, the user is asked to enter a Customer ID (dialogue, text box) identifying the pharmacy in the distributor's database. This ID is provided by the pharmacist. Previously entered IDs connected to a distributor are stored.</p> <p>After completing the above, the user clicks the "Select Products" button to continue to the Order Template.</p>
Orders	Order Form > New (con't)	<p>Details of a selected customer can be viewed after saving by opening the Customer Card (in a third pane), which is accessed by clicking the Customer Information Button ("i") to the right of each customer entry.</p>

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Module	Section or Attribute	Description
Orders	Order Form > Customer Information Button	The Planner allows the user to view customer information without leaving the Orders module or closing the Order Form. The user presses the blue info button to open a view of the customer's information (in a third pane, right) taken directly from the Customer Card for a given Institution.
	Order Form > Submitted	<p>Clicking on an item in the Orders List displays the details of the selected order record according to the format and contents of a completed order form:</p> <ul style="list-style-type: none"> • Institution • Institution Address • Order Number • Order Template • Distributor • Distributor Code • Status • Total • Discount • Net Value • Table of goods with the following information itemized per good (column headings): <ul style="list-style-type: none"> ○ Product ○ Amount ("quantity") ○ Discount ○ Price (in currency)
Orders	Order Form > Template Selection	The selection of templates available to a user are managed by configuration. Conditions for filtering the list of available templates can be set for customer and distributor.

Module	Section or Attribute	Description
Orders	Order Template	<p>Order Templates may vary widely in their specific content, depending on the conditions, workflows and supported interfaces with other systems required by the customer, per their business rules. Templates must be documented individually to describe their specific attributes and behavior. These have not yet been defined for [Customer] [Country].</p> <p>Generically, an order template contains a list of products that can be ordered. The list contains the following attributes for each item:</p> <ul style="list-style-type: none"> • Brand (read-only) • Product (read-only) • Amount (editable) • Discount (editable) • Paid/Free Pieces (editable) • Order Value (in currency, calculated) • Order Discount Value (in currency, calculated) <p>The Amount, Discount and Paid/Free Pieces fields contain a numeric value selector that allows the user to directly type numeric values into the entry field, or specify the amount by clicking the plus (+) and (-) buttons on either side of the entry field.</p> <p>The user is prevented from entering higher amounts than are permitted for a given good or goods (based on business rules) by field validation, which is performed by the system at the server level.</p> <p>When the user is finished product selection and data entry, the user presses “Summary” to complete the order. Additional validation steps may be required, according the configuration of the template and state management conditions. After submission, the order appears in the Order List.</p> <ul style="list-style-type: none"> • Editing an Order: <p>The user can edit a given order by pressing the “Edit Items” button at the bottom of the Order Form. The user is presented with a summary of all selected goods. The user can adjust the amounts as needed for each good, or can add additional goods to the transaction.</p> <p>Clicking “Add Item” opens a list of unselected goods. The user taps an item to select it (indicated by a checkmark) then clicks “OK” to proceed to return to the template. The newly selected goods are added to the template and the user can enter relevant data using the controls described above. The user then clicks “Summary” to resubmit the order with the changes saved.</p> <p>Orders are editable by the user during Open Days, but are locked for editing once a day is closed.</p>

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Module	Section or Attribute	Description
Orders	Order Template > Interfaces	The system may be interfaced at the system level with external 3 rd -party systems, according to the solution architecture implemented. This can include connection with wholesaler/distributor interfaces, or with a hub system (like Farmaprom in [Country]) that sends orders to individual wholesalers. Different types of interfaces can be established, depending on business requirements.
Expenses	General Description	<p>The Expenses module is used to manage the recording of financial transactions (both expenses and allowances), both those issued by the user (e.g. on behalf of customers) and those received by the user, applying configurable business rules and conditions to ensure business compliance by users.</p> <p>The module displays a list of all expenses recorded by the user as well as the details of each expense and their status.</p> <p>Controls may be established limiting the total amounts that can recorded by a user in an individual record. Conditions for such limits may be set according to the period and expense type, per budgeting rules.</p> <p>The Expenses module contains the following sections:</p> <ul style="list-style-type: none"> • Expenses List • Expense Form <p>Each section is described individually below.</p>

Module	Section or Attribute	Description
Expenses	Expense List	<p>The Expense List contains two types of records:</p> <ul style="list-style-type: none"> Expenses – money spent by the user Advances – money received by the user <p>The list of records is sorted and grouped by date, showing the most recent at the top of the list, and the oldest at the bottom.</p> <p>Above a group of dates, the list indicates the month in which the records were created and the date range of the month in the following format:</p> <p style="text-align: center;">Month YYYY-MM (MM/DD/YYYY - MM/DD/YYYY)</p> <p>Above a group of entries, the date and total amounts spent and received for all entries (with two decimal places displayed) are stated using the following format:</p> <p style="text-align: center;">MM/DD/YYYY –{nn}. {nn} / +{nn}. {nn}</p> <p>Each individual entry in the list displays the summary of a record with the following hierarchy, by type:</p> <ul style="list-style-type: none"> Expenses <ul style="list-style-type: none"> Type (type of expense) Cost Center (the cost center from which the expense was drawn) Amount (the recorded value spent, in currency) Advances <ul style="list-style-type: none"> Type (type of advance) Amount (the recorded value received, in currency) <p>Clicking on an entry opens displays the details of the selected record on the Expense Form according to the format and contents of a completed expense form. This includes, in addition to the above, any attachments, such as photographs of receipts captured by the user using the device’s built-in camera while recording the expense. The details of the Expense Form are described below.</p> <p>➤ Filters:</p> <p>The Expenses List can be filtered by date, using the date picker at the top of the list. The date selected is always “Date From” and the list displays all expenses from the selected date. The date picker uses OS-native components for date selection.</p> <p>The Expenses List can also be filtered by period, accessed by clicking on the list icon located above the Expense List. The date picker is replaced a picklist with all available periods. To return to the default list view, the user clicks the magnifying glass icon.</p>

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Module	Section or Attribute	Description
Expenses	Expense Form	<p>To create a new expense the user clicks the plus (+) button at the top of the Expenses List. This opens a blank Expense Form. The Expense Form comprises two parts: a form for filling in expenses, and a form for filling in advances.</p> <p>Expense forms may vary widely in their specific content, depending on the attributes required by the customer, per their business rules. These have not yet been defined for [Customer] [Country].</p> <p>A generic description of both expense and advance forms are provided below based on default configuration.</p>

Module	Section or Attribute	Description
Expenses	Expense Form > Expense	<p>Generically, an expense form contains the following fields:</p> <ul style="list-style-type: none"> • Date The default date is always the current date, but the user can record an order for another date by using the date picker (OS-native component). • Type The user selects an expense type from a picklist of available options. These are defined by configuration. • Cost Center The user selects a cost center from a picklist of available options. These are defined by configuration. • Customer Selection Customer selection is managed by clicking on the icons for Person and/or Institution. Clicking these opens a dialogue displaying a list of customers in the user's current active target group (cycle plan) (default list), a toggle filter that when switched allows the user to see all entities of a particular type in the user's assigned regions (Person, Institution), and a text box filter for typed queries. Filtering rules are the same as those described for the Search List text filter. The user may be able to select multiple targets for a single record, per configured business rules. Customer is not required to complete an expense record. • Amount and Currency Amount is a text field that supports the entry of numeric values only. The default currency is listed to the right of the field. Clicking on the currency symbol allows the user to select a different currency from the picklist, if available. • Payment Type The user can indicate whether an expense was paid by company credit or debit card by clicking a box labeled "Paid by Credit Card." When selected, the system automatically records an Advance of the same amount. • Description The user is required to enter a description of the expense (reason). The field is a text box supporting all characters. • Attachments The user can attach photographs to an expense record by clicking the plus (+) icon. The following options are presented:

Module	Section or Attribute	Description
Expenses	Expense Form > Expense (con't)	<ul style="list-style-type: none"> • Photo – Take New • Photo – Choose Existing <p>When the user is finished entering all required data, the user can press “Save” to save the expense, or “Cancel” to end the operation without saving. “Save” adds the record to the Expenses List and creates a summary of the record in the Expense Form. The user can edit the expense at any time until the day is closed.</p>
Expenses	Expense Form > Advance	<p>Generically, an advance form (for recording cash advances and other financial allowances) contains the following fields:</p> <ul style="list-style-type: none"> • Date <p>The default date is always the current date, but the user can record an order for another date by using the date picker (OS-native component).</p> <ul style="list-style-type: none"> • Type <p>The user selects an advance type from a picklist of available options. These are defined by configuration.</p> <ul style="list-style-type: none"> • Amount and Currency <p>Amount is a text field that supports the entry of numeric values only. The default currency is listed to the right of the field. Clicking on the currency symbol allows the user to select a different currency from the picklist, if available.</p> <ul style="list-style-type: none"> • Description <p>The user is required to enter a description of the advance (reason). The field is a text box supporting all characters.</p>
Media	General Description	<p>The Media module provides the user with access to all published media content (including CLM presentations) that are available to the user.</p> <p>Generally, media files fall into two categories:</p> <ul style="list-style-type: none"> • Media that can be opened ad-hoc by the user • Media that can be opened by workflow trigger (e.g. call report) <p>The latter are contextually available, usually in order to enforce proper data collection requirements connected to their use.</p> <p>The Media module contains the following attributes:</p> <ul style="list-style-type: none"> • Media List • Media Options <p>These are described in detail in the following sections.</p>

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Module	Section or Attribute	Description
Media	Media List	<p>The Media List is a list of published media content (items) available to the user.</p> <p>Each item in the list contains the following information and options:</p> <ul style="list-style-type: none"> • File Icon (format: image) • File Version (format: Version {n}) • File Size (MB) • Date Published (format: MM/DD/YYYY) • Release Notes (text strings; multi-row) • Options: <ul style="list-style-type: none"> ○ Download (downloads the available file) ○ Update (updates the file, if updates are available; users cannot open files that require updates prior to updating) ○ Open (launches the file; this option is greyed out if not permitted by workflow)
Media	Media Options	<p>The module supports the following global options for all files in the Media List:</p> <ul style="list-style-type: none"> • Download All New Downloads all available files not already downloaded • Update All Updates all available files not already updated

Module	Section or Attribute	Description
Media	Publishing and Access	<p>Publishing of media files is managed by AdminTool. Publishing options allow the administrator to specify the following assignment options for each media file, which determine both its availability to users, and the contexts in which it can be accessed:</p> <ul style="list-style-type: none"> • User • Organization Unit (Business Unit, Line) • Questionnaire Assignment <p>When a media file is assigned to questionnaire, it inherits the assignment rules governing the questionnaire (e.g. customer type, customer specialization). In such cases, the media file can only be opened from the questionnaire, which, when completed, will be connected to a particular customer record.</p> <p>Media files launched from questionnaires are opened by clicking the button “Start Presentation.” The display of the button can be conditional, and it can be placed anywhere in the questionnaire. Typical locations include:</p> <ul style="list-style-type: none"> ➤ At the beginning of the questionnaire <p>Presentations are launched at the beginning of the questionnaire when the user is expected to present the file content to the customer at the start of the visit. They are also placed at the beginning when used to capture information that is used to complete an activity report.</p> <ul style="list-style-type: none"> ➤ After answering a question <p>Presentations launched in response to answers to specific questions are used to provide supplementary illustrative information to a customer, usually in response to specific interests, as indicated by the answer to a given question. They are also placed in this context when used to capture contextually relevant information about a customer or customer interaction.</p>

Module	Section or Attribute	Description
My Work	General Description	<p>The My Work module, used both for planning and reporting activities, and for creating orders, provides the user with a consolidated list of scheduled and unsubmitted activities that require a user's attention. It operates in both online and offline modes.</p> <p>My Work replicates key functions of both the Planner and Orders module. From Planner, it adopts the Activity List and Activity Form. From Orders, it adopts the Order Form and Order Templates. The behaviour of each is consistent with previous descriptions. The user can perform the following tasks using this module:</p> <ul style="list-style-type: none"> • Review unsubmitted tasks – the user can view all activities requiring further action (from Planner), both planned and incomplete. • Review tasks completed offline – the user can view all submitted activities and orders which have been prepared offline prior to synchronization. • Create Call Reports – the user can access call report questionnaires and report visits to customers (offline and online). • Create Orders – the user can access order templates and use them to create orders (offline and online). • Work Offline – the user can access all activities which are already scheduled and complete call reports when disconnected from the internet. New orders can also be created offline. • Synchronize with the Server – the user can initiate synchronization to capture fresh data from the server, or to send data created while offline to update master records on the server. Synchronization is permitted in both online and offline modes. Switching modes automatically triggers synchronization. • Close Days – the user can close their open days once all activities scheduled on a given day have been submitted. Closing a day sends the submitted activities into a terminal state and locks them from further editing. <p>My Work displays a split screen view (2 or 3 panes) with the following sections displayed in each, depending on user actions:</p> <ul style="list-style-type: none"> • My Work List • My Work Form • Customer Card <p>These are described in detail in the following sections.</p>

Module	Section or Attribute	Description
My Work	My Work List	<p>The My Work List displays three lists, the display of each managed by buttons. Each list displays a different set of content:</p> <ul style="list-style-type: none"> • Open – unsubmitted activities • Activities – activities submitted offline (sync queue) • Orders – orders created offline (sync queue) <p>Open and Activities lists contain the following summary information about a scheduled or submitted activity:</p> <ul style="list-style-type: none"> • Call Date (DD/MM/YYYY) and Time (HH:MM AM/PM) • Call Type (“Activity Type”) • Address (Institution address or Person workplace) • Status (indicated by icon) <p>Clicking an item on the list loads the detail in the Activity Form.</p> <p>Orders list contains the following summary information about a created order</p> <ul style="list-style-type: none"> • Date • Institution • Distributor • Order Template • Total • Status <p>Clicking on an item opens the Order Form and displays the details of the selected order record according to the format and contents of a completed order form and order template.</p> <p>The My Work List also includes a date field, online/offline mode switch buttons, closing day button (contextual), and synchronization button. These elements and the options associated with them are described below.</p>

Module	Section or Attribute	Description
My Work	My Work List > Options	<p>➤ Date</p> <p>Above the My Work List is a date field with the label “Date to” which the user can use to select a preferred date (using a date picker). In online mode, the Open list displays all activities up to the selected date (default is the current date). In offline mode, the default for the selected date is one week (7 days) in the future. This allows the user to view and submit all scheduled activities for the following week in case of connectivity failure.</p> <p>The date picker allows the user to directly navigate to the current date (“Today”) and the First Open Day.</p> <p>➤ Status</p> <p>Below the date field, the module displays information about the status of the selected date (options: “Closed”; “Not Closed”) and the reason for the status (e.g. “Previous day is not closed.”).</p> <p>➤ Close Day</p> <p>When all activities scheduled on a selected date are submitted, the reason field is replaced with a “Close Day” button (indicated by a calendar icon with checkmark) that, when pressed, closes the day, sending all submitted activities to a terminal state.</p> <p>➤ Synchronization</p> <p>At the bottom of the list is a synchronization button (“Sync Now”) that, when pressed, initiates synchronization. Synchronization does not change the mode of the application. However, switching between online and offline modes automatically initiates synchronization.</p> <p>Below the “Sync Now” button, string text displays the last sync date and time in the following format: “{Day Name}, {Month Name} {DD}, {YYY} {HH:MM:SS} [AM or PM]</p> <p>9. Add New (plus “+” button)</p> <p>The Plus button, when clicked, presents the user with two options:</p> <ul style="list-style-type: none"> • Activity (available only in online mode) – opens a new Activity Form, which the user can use to plan a new activity. • Order (available in both online and offline mode) – opens a new Order form, which the user can use to create a new order
My Work	My Work – Activity Form	Follows the description of the Activity Form and its behavior described elsewhere in this document
My Work	My Work – Order Form	Follows the description of the Order Form and its behavior described elsewhere in this document

Module	Section or Attribute	Description
My Work	Online Mode vs. Offline Mode – Impact on Other Modules	<p>The key differences between working offline versus online, is that the selection of options and screens available offline is more limited. In offline mode, for example, the user can complete call report templates for customers for which activities are already planned or outstanding, but cannot plan and report new activities. Likewise, in offline mode, the user can view basic information about customers in the Customer Card (= name, address, phone, rating, contact hours), but cannot view additional details (= profiles, recent activities, notes, transactions, orders) about the customer.</p> <p>Modules which are available offline and their corresponding offline functions:</p> <ul style="list-style-type: none"> • Search – allows the user to view basic information in Customer Cards of Target Group customers (= name, address, phone, rating, contact hours); subsections are not available. • Dashboard – allows the user to view pre-loaded KPI reports (the user must be online to generate the reports from the server; already loaded reports are available for offline viewing) • My Work – allows the user to view all scheduled activities (= items already added to the Planner), report calls (limited to events that are already scheduled), play CLM presentations (where embedded in used questionnaires), create new orders, and view basic customer information. • Media – allows the user to access and view already downloaded media files, per permissions. • Settings – allows the user to view system information and change the Look & Feel and Display Names of the application
Dashboard	General Description	<p>The Dashboard module containing all dashboards (embedded reports) assigned to the user.</p> <p>The specific behavior of a dashboard or report is defined by parameters, including displayed data and features, such as filters. Dashboard and report requirements have not yet been defined by [Customer] [Country] and must be documented individually according to specification.</p> <p>The Dashboard module itself functions as a container for both native and embedded reports, depending on the components used to build the report.</p> <p>The main controls native to the module itself is a refresh button, located in the top right of the main pane, which functions similar to a browser refresh button, and report selection buttons, which allow a user to select the report they wish to view.</p> <p>Reports may be viewed offline, but must be loaded online.</p>

Module	Section or Attribute	Description
Tools	General Description	<p>The Tools module allows the user to copy target groups and profiles between two periods.</p> <p>This is typically permitted only in set ups where the user is responsible for the content and management of their own target groups, and where profiles are period specific. When the Cycle Plan module is used, this module becomes obsolete since the Cycle Plan module and associated work flows automatically copy both target customers and associate profiles from one period to the next without user action.</p> <p>The Tools module contains the following features:</p> <ul style="list-style-type: none"> • Period Selection • Target Groups Selection • Profiles Selection <p>While it is presumed that this module and its options will be out of scope for [Customer] [Country], the details of specific information sections and user options are described below.</p>
Tools	Period Selection	<p>The user can copy information between two periods. Period Selection is used to define these periods. It displays two fields, both picklists, for selecting source and destination periods:</p> <ul style="list-style-type: none"> • Source Period – per defined period structure • Destination Period – per defined period structure <p>Configuration based on business rules determine the type and range of periods available to the user.</p>
Tools	Target Groups	<p>Target Groups allows the user to copy target customer lists between two periods. Period Selection is used to define these periods. This section displays two fields, both picklists, for selecting source and destination target groups:</p> <ul style="list-style-type: none"> • Source – requires source period availability • Destination – requires destination period availability <p>Configuration based on business rules determine the type and range of target groups available to the user.</p> <p>To activate the transfer the user presses the “Copy Data” button.</p>

Module	Section or Attribute	Description
Tools	Profiles	<p>Profiles allows the user to copy target profiles by type between two periods. Period Selection is used to define these periods. This section displays three fields, all picklists, for selecting source and destination profiles:</p> <ul style="list-style-type: none"> Type – based on available profile types (e.g. Person profiles, Institution profiles) Source – requires source period availability Destination – requires destination period availability <p>Configuration based on business rules determine the type and range of target groups available to the user.</p> <p>To activate the transfer the user presses the “Copy Data” button.</p>
Settings	General Description	<p>The Settings module allows the user to review basic system information, customize application elements such as theme and display names, set the active Target Group (if permitted), and resent application content and settings (if permitted).</p> <p>It contains the following sections:</p> <ul style="list-style-type: none"> System Information (read-only) Look & Feel (editable) Display Names (editable) Active Target Group (editable) Support (hyperlink) Reset (button) <p>Changes are activated by pressing the “Save” button. Saving returns the user to the Homepage will all changes applied.</p> <p>Reset returns the user to the login screen with empty fields for username and password, or (optionally) the requirement to enter an enrollment key.</p> <p>The details of specific information sections and user options are described below.</p>
Settings	System Information	<p>System Information displays the following information about the application on the device:</p> <ul style="list-style-type: none"> Server URL Environment Application Version Database Version Database Size Available Storage <p>Data are read-only and presented as system text.</p>

Module	Section or Attribute	Description
Settings	Look & Feel	<p>The user has the option to select from two available themes:</p> <ul style="list-style-type: none"> • Dark • Light <p>Theme selection changes the background and default font colors of the application. The purpose is to provide optimum visibility of the user interface and comfort for the user in different light conditions.</p> <p>Options are selected by button.</p>
Settings	Display Names	<p>The user has the option to select from two available formats for customer names:</p> <ul style="list-style-type: none"> • Print Name • Sort Name <p>This setting affects the way names are displayed in the Search module and other locations where customer names are displayed or listed.</p> <p>Options are selected by button.</p>
Settings	Active Target Group Selection	<p>The user has the option to select active target group from the list of available target groups. Target Group for this purpose means target customer list.</p> <p>The list of available target groups can be accessed via picklist.</p> <p>In scenarios where users are required to work with a centrally-defined or approved target group for each cycle (i.e. cycle plan) this feature is disabled for end users</p>
Settings	Reset	<p>If permitted, the user can reset all contents and settings.</p> <p>To do this, the user clicks the button “Reset All Content and Settings”.</p> <p>The user is then prompted to confirm the operation by a dialogue message containing the following text and options:</p> <p style="text-align: center;"><i>Reset</i></p> <p style="text-align: center;"><i>All data will be deleted. Do you want to continue?</i></p> <p>Options:</p> <ul style="list-style-type: none"> • No • Yes

Module	Section or Attribute	Description
Messages	General Description	<p>The Messages module allows system administrators to publish messages to end users. Messages are one-way broadcasts used for distributing important information to end users. There is no option for users to reply.</p> <p>The Message module can be accessed from anywhere in the application by clicking on the messages icon (indicated by an envelope) at the top right of each application screen, to the left of the Sidebar Menu icon.</p> <p>The module contains the following information sections:</p> <ul style="list-style-type: none"> • Message List (“News”) • Message Details <p>The user confirms receipt of a message by pressing the “OK” button located at the bottom of the message detail. Unread messages are marked with a red badge on the messages icon, which appears in the header of the application on all screens.</p> <p>Messages are created and sent via administration (AdminTool). A published message contains the following data:</p> <ul style="list-style-type: none"> • Subject • Description • Author • Creation Date and Time • Body <p>The details of the specific information sections and user options are described below.</p>
Messages	Message List	<p>The Message List presents the list of messages. Each entry contains the following information published content:</p> <ul style="list-style-type: none"> • Message Subject • Message Description
Messages	Message Details	<p>Message Details presents the main content of the message. It displays the following information:</p> <ul style="list-style-type: none"> • Author • Creation Date and Time (“Created”) with following format: MM/DD/YYYY HH:MM:SS AM/PM • Subject • Message Body (message text, including format HTML and hyperlinks)

6.1.1.3 Windows Client Modules – Functional Specification

Windows Client modules in scope have not yet been defined. Their descriptions will be added once the scope has been defined. A list of modules is provided.

The Windows OS native application, used by FF Managers, runs locally on the Windows PC of the user. It is a fully-offline application that communicates data to and from the central server, located in Prague, Czech Republic, exclusively via synchronization. FF Managers typically use this application to access the following modules and informational sections:

- Home Page
- Reports Manager
- Analysis
- Search
- Update Request
- Organization Structure
- Planner
- Territory Management
- Warehouse
- Orders
- Expenses
- Sales Data

Note: the stated requirements from [Customer] [Country] only describe the iPad application as in scope of this implementation.

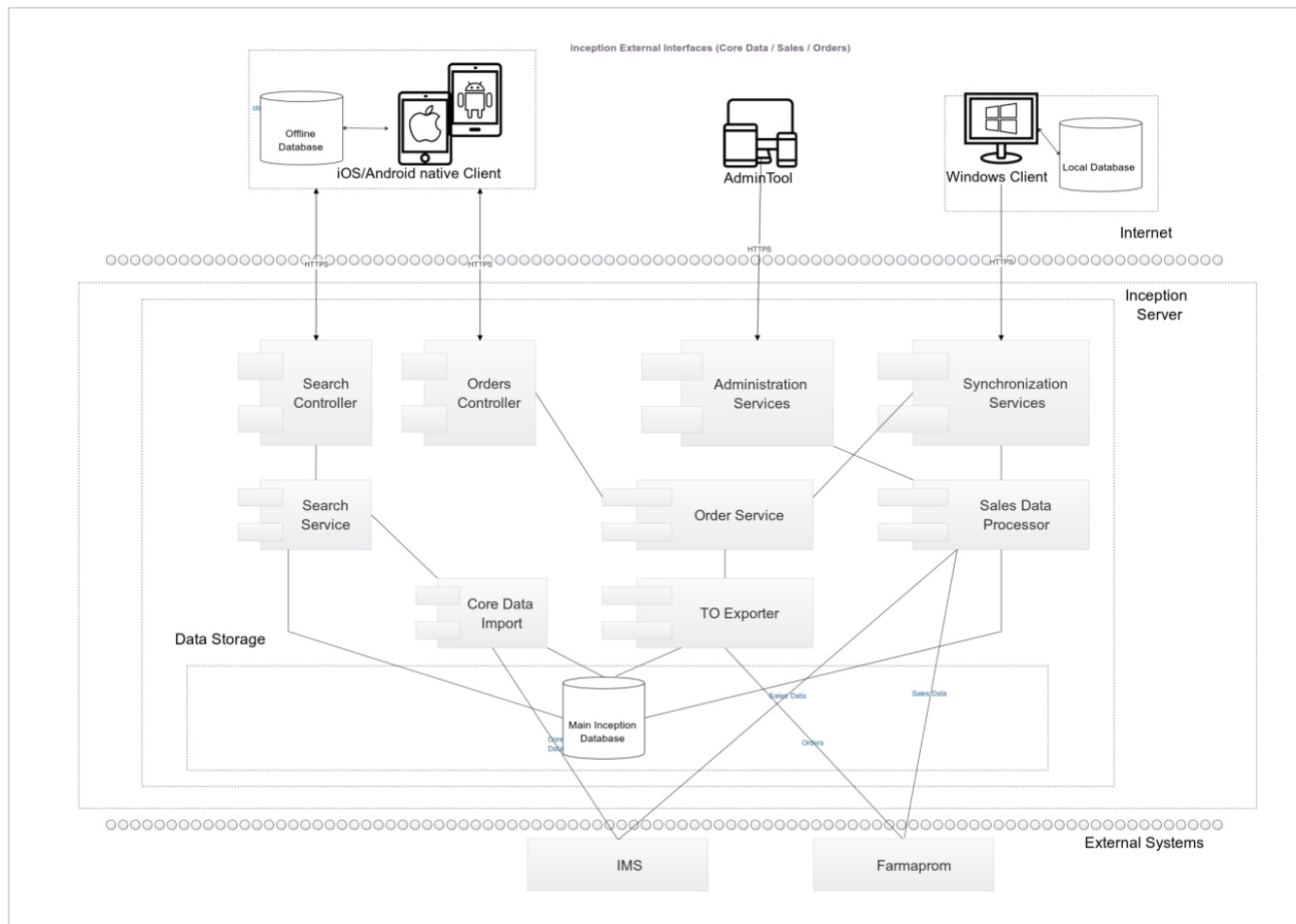
6.1.1.4 Web Reports – Functional Specification

Web Reports in scope have not yet been defined. Their descriptions will be added once the scope has been defined.

6.1.1.5 AdminTool – Functional Specification

AdminTool is described by its configuration options, including fields and interactions, in Sec. 5. Customer specific configuration is documented during system parameterization. As a vendor-managed application per the terms of the vendor's price offer, it's business features (general behaviors and operational flows) are not in scope of this functional description.

6.1.2 Main System Interfaces



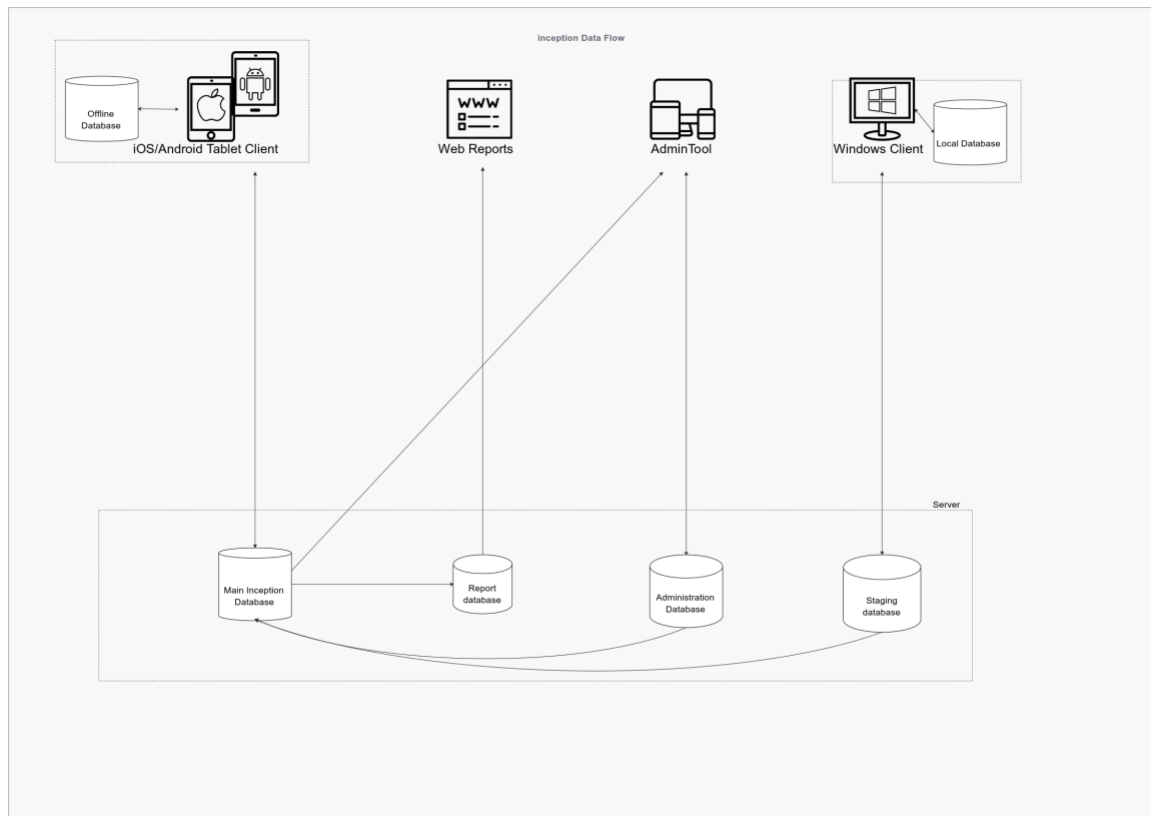
6.2 Coding Standards

The vendor follows C# coding conventions. These include: Naming Conventions, Layout Conventions, Commenting Conventions, and Language Guidelines. Information about C# Coding Conventions can be found here: <https://docs.microsoft.com/en-us/dotnet/csharp/programming-guide/inside-a-program/coding-conventions>

6.3 Solution Data, Information View, and Data Requirements

6.3.1 Data Storage

All data in the Inception CRM system are stored in MS SQL Server databases.



6.3.2 Data Entities and Data Types

The basic data entities in the Inception CRM system include the following, as well as the relationships among them:

- Users
- Customers
- Activities
- Expenses
- Orders
- Sales
- Transactions (e.g. sample drops)

These entities are implemented using all basic data types (numeric, variable-length strings, logical values, binary data, floating point decimals, and so forth) and as well as collections of basic data types. For example, a profile can contain multiple values.

The system also works with a range of external data formats (e.g. MS Office documents, media files, text files, PDFs, etc.).

6.3.3 Data Formats for External Interfaces

Online communication with external systems utilizes SOAP, JSON, XML, and email message formats.

Inception processes external files in MS Excel and .CSV and is able to export in these format for external system consumption.

6.3.4 System Attributes

All records created in the Inception system contain the following attributes: Owner, Creation Date with timestamp, Last Modification Owner, Last Modification Date with timestamp, Record State (active, deactivated).

6.4 Module Description

This section describes each module individually in terms of its interfaces with other modules, specific fields and interactions, as well its general process flows and conditions.

The features in scope of this functional description are all interfaces (screens and screen content) accessed by Inception business users.

The description of each module or distinct application area starts a new page.

6.4.1 Login

6.4.1.1 Interfaces to Other Modules > Subsections

- Homepage

6.4.1.2 Fields and Interactions

6.4.1.2.1 Application Enrollment

Field Name	Description	Type	Required
Welcome	Label	System Text	
Key	Allows the user to enter an enrollment key	Text Field	Yes
Enroll	Opens the initial login screen	Button	
Don't have Enroll Key yet? Sign Up	Allows users who don't have an enrollment key to request one	System Text + Button	Out of Scope
Sign Up	Opens the registration screen	Button	Out of Scope

6.4.1.2.2 Initial Login

Field Name	Description	Type	Required
Welcome Back!	Label	System Text	
User	Allows user to enter username	Text Field	Yes
Password	Allows user to enter password	Text Field	Yes
Language	Allows user to select application language	Picklist	No
Sign in	Logs user in with the above data. Opens the Homepage of the application	Button	

6.4.1.2.3 Subsequent Login

Field Name	Description	Type	Constraints
Welcome Back!	Label	System Text	
User	Prefilled with username	Stored Text	

Field Name	Description	Type	Constraints
Password	Allows user to enter password	Text Field	
Language	Allows user to select application language	Picklist	Default is always English if no application configuration exists; application sets new default when a language is selected
Sign in	Opens the Homepage of the application	Button	

6.4.1.3 Preconditions

1. The user has an enroll key OR
2. The application is already enrolled (e.g. via MDM)
3. The user has an account
4. The user has both username and password
5. The user is not logged into the system
6. The user's identity has not been authenticated
7. The user cannot access any screen in the system

6.4.1.4 Postconditions

1. The user's identity is authenticated
2. User's identity is permanently stored in the local database of the application (i.e. in the local storage of the application on the device) whereas passwords are not stored (they are used only to validate the current session).
3. User can use all functions of the system available to their assigned roles.

6.4.1.5 Normal Flow of Operations

1. User cannot access any screen in the system
2. User is not identified within the system
3. User is redirected to the Login page
4. User uses their login name and password to log in
5. Credentials are sent to the server and validated
6. Login name is stored in the cache to allow later automatic identification
7. User is redirected to the home screen
8. User gets the screen content and can use its functionality
9. User can access all modules according to assigned rights

6.4.1.6 Alternative Flow of Operations

1. If the user has already been authenticated from a previous login, username is automatically pre-filled to simplify the login procedure; password must always be provided.
2. If the server session ends while the user is logged in, the user must re-enter his/her password to log in again

6.4.2 Logout

6.4.2.1 Interfaces to Other Modules > Subsections

- Login

6.4.2.2 Fields and Interactions

Field Name	Description	Type	Required
Logout	Logout Button	Button	Yes

6.4.2.3 Preconditions

1. The user is logged into the system

6.4.2.4 Postconditions

1. The user is logged out

6.4.2.5 Normal Flow of Operations

1. The user clicks the Logout button
2. The user is logged out
3. The user is redirected to the login screen

6.4.3 Failed Login Attempt

6.4.3.1 Description

User is prevented from accessing the application due to password expiry or administrative lockout. Administrator has set the max. number of attempts for incorrect access and the number of minutes of mandatory account lockout in AdminTool (Password Policy).

The administrator can also set a number of days for automatic password expiration, after which user is forced by the system to change their password (described in Sec. 6.4.4. “Change Password”).

In case of correct login, the number of failed login attempts is reset to zero.

6.4.3.2 Preconditions

1. User is not logged in to the system
2. User fails authentication by providing an incorrect password / or
3. User’s password has expired

6.4.3.3 Postconditions

1. Account is locked
2. User must request a new password from the administrator, and then change it using the Change Password process

6.4.3.4 Normal Flow of Operations

1. User is logged out.
2. User opens the app to the Login screen
3. User attempts to enter incorrect or expired password
4. Account is locked after incorrect number of login attempts is exceeded

6.4.4 Change Password

6.4.4.1 Description

Allows changing the password of the current user. The following conditions are observed:

- In password policy, the administrator can set up a warning prior to expiration that warns the user that his/her password will expire in {n} number of days.
- In the Settings module, the application displays a change password dialogue and the user can choose to change password or not.
- In password policy, the administrator can set the application to read the password history and restrict the number of previously used passwords that can be used as new password.
- Password will expire after a specific number of days from last password change.
- If password policy expiration is turned off, password will not expire.
- During password change, the user fills in their old (current password), enters a new password, and enters the new password again for confirmation.
- User can be forced by the system to change the password at the first login.
- Force changing of passwords can be done anytime by the logged in user in the Settings module (Sec. 6.4.18).

6.4.4.2 Fields and Interactions

Field Name	Description	Type	Constraints
Change password	Opens a dialogue that allows the user to change their password; contents of this dialogue are described below	Button	Requires role permissions
Previous Password	User enters current password	Text Field	Requires role permissions
New Password	User enters new password	Text Field	Requires role permissions
Verify Password	User enters new password again	Text Field	Requires role permissions
Cancel	Cancels the operation and closes the dialogue	Button	Requires role permissions
Apply	Confirms the operation and closes the dialogue	Button	Requires role permissions

6.4.4.3 Preconditions

1. User is logged in to the system

6.4.4.4 Postconditions

1. User's password is changed

6.4.4.5 Normal Flow of Operations – Password Change Required

1. When logging in, the user gets a dialogue message which states: “Your password will expire soon. Do you want to change it now?”
2. User clicks “Yes” to Change Password
3. User fills in the current password
4. User fills in the new password and confirms it by filling it in again in the confirmation field
5. User clicks on “Apply” button to confirm the change

6.4.4.6 Alternative Flow of Operations – Force Password Change

1. User opens the Settings module
2. User clicks “Change password”
3. User fills in the current password
4. User fills in the new password and confirms it by filling it in again in the confirmation field
5. User clicks on “Apply” button to confirm the change

6.4.5 Change Language

6.4.5.1 Description

Switches user interface into specific language and formats data using regional specific rules.

The user must select his/her preferred language prior to logging in; the language cannot be changed once the user is already logged in.

Changing language functions are only available in the Login screen.

6.4.5.2 Fields and Interactions

Field Name	Description	Type	Constraints
Language	Displays a list of language options; language names are not localized to the current active language but are written in their original language formats	Picklist	Requires language availability (performed through localization of application strings)

6.4.5.3 Preconditions

1. User is not logged in to the system

6.4.5.4 Postconditions

1. User is logged in
2. User sees all texts in selected language
3. All data presented to the user are in regional format (numbers, dates etc.)

6.4.5.5 Normal Flow of Operations

1. User accesses all modules and screens to which they have assigned roles
2. System presents screen content and data in specified language and regional format
3. System makes the selected language the new default language

6.4.5.6 Exceptions

1. Default language is switched to English if the language configuration is not available.

6.4.6 Home Screen

6.4.6.1 Interfaces to Other Modules > Subsections

- Search
- Update Requests
- Planner
- Cycle Plan
- Orders
- Warehouse
- Expenses
- My Work
- Dashboard
- Tools
- Settings
- Messages
- Logout

6.4.6.2 Fields and Interactions

6.4.6.2.1 Main Menu

Field Name	Description	Type	Constraints
Search	Directs the user to the Search module	Button	
Update Request	Directs the user to the Update Request module	Button	
Planner	Directs the user to the Planner module	Button	
Cycle Plan	Directs the user to the Cycle Plan module	Button	User permissions required, module must be enabled
Orders	Directs the user to the Orders module	Button	User permissions required, module must be enabled
Warehouse	Directs the user to the Warehouse module	Button	User permissions required, module must be enabled
Expenses	Directs the user to the Expenses module	Button	User permissions required, module must be enabled
My Work	Directs the user to the My Work module	Button	
Dashboard	Directs the user to the Dashboard module	Button	User permissions required, module must be enabled
Tools	Directs the user to the Tools module	Button	User permissions required, module must be enabled
Settings	Directs the user to the Settings module	Button	

Field Name	Description	Type	Constraints
Messages	Directs the user to the Messages module	Button	User permissions required, module must be enabled
Logout	Logs the user out of the application	Button	

6.4.6.2.2 Sidebar Menu

Field Name	Description	Type	Constraints
Search	Directs the user to the Search module	Button	
Update Request	Directs the user to the Update Request module	Button	
Planner	Directs the user to the Planner module	Button	
Cycle Plan	Directs the user to the Cycle Plan module	Button	User permissions required, module must be enabled
Orders	Directs the user to the Orders module	Button	User permissions required, module must be enabled
Warehouse	Directs the user to the Warehouse module	Button	User permissions required, module must be enabled
Expenses	Directs the user to the Expenses module	Button	User permissions required, module must be enabled
My Work	Directs the user to the My Work module	Button	
Dashboard	Directs the user to the Dashboard module	Button	User permissions required, module must be enabled
Tools	Directs the user to the Tools module	Button	User permissions required, module must be enabled
Settings	Directs the user to the Settings module	Button	
Messages	Directs the user to the Messages module	Button	User permissions required, module must be enabled
Logout	Logs the user out of the application	Button	

6.4.6.3 Preconditions

2. The user is logged in

6.4.6.4 Postconditions

1. The user is able to access all visible modules

6.4.6.5 Normal Course of Events

1. User accesses any module by clicking on the module icon; clicking on these icons navigates the user to the screens of the selected module
2. User can use the hardware back button on device to return to Home Screen, however, for more comfortable navigation, the user should use “Drawer Menu”.

The “Sidebar Menu” provides to access the same menu of items as the Home Screen and replicates its functionality (it is basically another view of the Home Screen available throughout the application via toggle). This menu is available (via the top right button, composed of three horizontal lines) when viewing screens of other modules. The Sidebar Menu is the primary navigation method once the user is inside the application modules.

6.4.6.6 Alternative Courses

1. If it is inconvenient for the user to return to Home Screen via the back button on the device, and the user does not wish to use the Drawer Menu, then the user must log out and log back into to the application to access the Home Screen again.

6.4.6.7 Exceptions

1. In case of timeout or application crash, the user must log in to the application. Logging in returns the user to the Home Screen.

6.4.6.8 Assumptions

1. The application is available in other languages, and user has rights to select a non-default language.

6.4.7 Search

6.4.7.1 Interfaces to Other Modules > Subsections

- Planner > Activity Form (prefilled with customer details)
- Warehouse > Transaction Form (prefilled with customer details)
- Orders > Order Form (prefilled with customer details)
- Expenses > Expense Form (prefilled with customer details)
- Update Request Form > Update Person (prefilled with customer details)
- Update Request Form > Update Institution (prefilled with customer details)
- Update Request Form > Merge Workplaces (prefilled with customer details)
- Update Request Form > Merge Institutions (prefilled with customer details)
- Update Request Form > Delete Person
- Update Request Form > Delete Institution
- Update Request Form > Delete Workplace

6.4.7.2 Fields and Interactions

Module Section	Field Name	Description	Format	Constraints
Search List	Search Filter	Opens search dialogue box containing sets and subsets of filter options	Icon	
Search List	Text Box Filter	Filters list by keyword	Text Box	
Search List	Target Group Filter	Filters by "Target Group" profile assignment	Toggle	
Search List	Search List	Shows results of DB query (Pers. and Inst.)	List	
Search List	Database Counter	Displays number of visible entities and total number of entities in the DB matching the same filter criteria (n of n displayed)	Formatted Text	
Search List	Bulk Action	Enables additional options and changes behavior of List objects	Toggle	
Search List	Plus Icon	Opens a menu of options (action items)	Button	
Customer Card	Customer Name	Displays print name of customer	System Text	
Customer Card	Type	Displays system category of customer (e.g. "Doctor" or "Clinic")	System Text	
Customer Card	Specialization	Displays primary specialization of customer	System Text	Person
Customer Card	Workplaces	Opens dialogue box containing list of assigned workplaces	Button	Person
Customer Card	Employees	Opens dialogue box containing list of assigned employees	Button	Institution

Module Section	Field Name	Description	Format	Constraints
Customer Card	Phone	Displays primary work phone of customer	System Text + Icon	
Customer Card	Address	Displays address of Institution or primary workplace of Person	System Text	
Customer Card	Map	Opens new screen showing location on Google Maps	Button	
Customer Card	Target Group Name	Name of currently used Target Group	System Text	
Customer Card	Target Group Editor	Adds / Removes customer from currently used Target Group	Toggle	
Customer Card	Planner Shortcut	Navigates user to Planner module > New Activity screen with customer name pre-filled	Button	
Customer Card	Warehouse Shortcut	Navigates user to Warehouse module > New Transaction screen with customer name pre-filled	Button	Person
Customer Card	Update Request Shortcut	Navigates user to Update Request module, displaying either: a. Update Customer Information screen; b. Add Workplace screen, depending on which option is selected	Button	Add Workplace option is only available for Persons
Customer Card	Tier	Allows the user to view the customer's Tier assignment	Radio Button	Read-only
Customer Card	Profiles	Opens additional screen (Split screen right: View 3) showing all available profile values of the customer, both editable and read-only	Menu Label	
Customer Card	Recent Activities	Opens additional screen (Split screen right: View 3) showing history of visits to the customer, with a toggle filter allowing the user to view only his/her own visits (default), or all visits by all users	Menu Label	
Customer Card	Warehouse	Opens additional screen (Split screen right: View 3) showing history of transactions (=sample drops) to the customer, with a toggle filter allowing the user to view only his/her own transactions (default), or all transactions by all users	Menu Label	Person
Customer Card	Contact Hours	Table displaying customer availability / opening hours / preferred visiting hours (depending on purpose and use)	System Text	

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Module Section	Field Name	Description	Format	Constraints
Customer Card	Contact Hours Editor	Opens the table for editing in dialogue box	Button	

6.4.7.3 Preconditions

1. User is assigned at least one Geo Unit containing a list of customers

6.4.7.4 Postconditions

1. Customer records are found
2. Operations are performed using customer data

6.4.7.5 Normal Flow of Operations

1. User can optionally filter out the list
2. User finds desired Customer(s)
3. User clicks on a Customer entry to view the Customer Detail screen (Person / Institution Detail)
4. User uses Bulk Action to schedule activities, manage the Target Group status, or set profile values of selected customers

6.4.7.6 Assumptions

1. User sees only their own customers (typically all customers located in Geo Units assigned to the user).

6.4.8 Update Requests

6.4.8.1 Interfaces to Other Modules > Subsections

- Search > Customer Card

6.4.8.2 Fields and Interactions

6.4.8.2.1 Person Fields

Field Name	Toggle	Description	Constraints	Required
Title before		(e.g. Dr., Mr., Ms., etc.)	Free Text	No
Name		First name	Free Text	Yes
Middle name		Middle name	Free Text	No
Surname		Last name	Free Text	Yes
Title after		(e.g. MD, etc.)	Free Text	No
Gender	Male	(select)	button	Yes
	Female	(select)	button	Yes
Type		(professional role)	pick list	Yes

6.4.8.2.2 Workplace Fields

Field Name	Toggle	Description	Constraints	Required
Institution	New	User can choose from existing workplaces (Institutions) or create a new workplace (optional)	opens New Institution form	Yes
	Search		pick list or free text search	
Department		Org. unit of workplace		No
Position		Professional's role		Yes
Specializations	No. 1:	Primary Specialization	pick list or free text search	Yes
	No. 2:	Secondary Specialization	pick list or free text search	No
	No. 3:	Third Specialization	pick list or free text search	No
Street		Workplace street address	Free Text	Yes
Zip code		Workplace post code	Free Text	Yes
City		Workplace city	Free Text	Yes
Area		Brick or assigned district	Pick list	Yes
Phone work		Main work phone	Free Text	Yes

Field Name	Toggle	Description	Constraints	Required
Phone work 2		Secondary work phone	Free Text	No
Cell phone		Mobile	Free Text	No
Fax		Fax	Free Text	No
Email		Company email	Free Text	No

6.4.8.2.3 Institution Fields

Field Name	Description	Constraints	Required
Name	Name of business / institution	Free Text	Yes
Type	Type of business (e.g. clinic)	pick list or free text search	Yes
ICO	(bank info)	Free Text	No
IBAN	(bank info)	Free Text	No
Street	Institution street address	Free Text	Yes
Zip code	Institution post code	Free Text	Yes
City	Institution city	Free Text	Yes
Area	Brick or assigned district	Pick list	Yes
Phone work	Main work phone	Free Text	Yes
Phone work 2	Secondary work phone	Free Text	No
Cell phone	Mobile	Free Text	No
Fax	Fax	Free Text	No
Email	Company email	Free Text	No

6.4.8.2.4 Note

Field Name	Description	Constraints	Required
Note	Reason for update	Free Text	Yes

6.4.8.3 Preconditions

1. User is assigned at least one Geo Unit containing a list of customers
2. The user has assigned rights to update or request the update of customer records
3. The Update Request module is enabled

6.4.8.4 Postconditions

1. An update is submitted to (or for processing into) the master database
2. A new entry is added to the Updates List

6.4.8.5 Normal Flow of Operations

6.4.8.5.1 Steps for Updating Existing Customer Details (Person, Workplace):

1. User opens the Customer Card of the customer being updated
3. User presses the Update Request button and selects the option “Update”
4. User modifies fields that contain incorrect or out-of-date information
5. User enters a note to explain the reason for the change
6. User presses the “Summary” button to review the changes
7. User presses “Edit” to repair any inaccuracies (optional)
8. User presses the “Done” button to submit the updates / request
9. The changes to the customer record are submitted for processing into the master database
10. A new entry is added to the Updates List
11. The user checks the status of his/her request in the Updates List (where approval steps are required)

6.4.8.5.2 Steps for Adding Workplace (to a Person):

1. User opens the Customer Card of the Person being updated
2. User presses the Update Request button and selects the option “Add Workplace”
3. When assigning a Workplace, the user either
4. presses the “Search” button to select an existing Institution from the database, or
5. presses the “New” button to add a new Institution to the database, which is then assigned to the Person (once approved)
6. User (a) selects an existing institution or (b) fills out a request form to create a new institution
7. User enters a note to explain the reason for the change
8. User presses the “Summary” button to review the changes
9. User presses “Edit” to repair any inaccuracies (optional)
10. User presses the “Done” button to submit the updates / request
11. The changes to the customer record are submitted for processing into the master database
12. A new entry is added to the Updates List
13. The user checks the status of his/her request in the Updates List (where approval steps are required)

6.4.8.5.3 Steps for Adding a New Customer (Person):

1. User opens the Update Request module and presses the plus “+” icon at the top right of the Updates List
2. User selects “New Person” from the menu of options
3. User fills in required information about the new customer in all three information sections: Person, Workplace, Note
4. User fills in optional information about new customer (optional)
5. When assigning a Workplace, the user either
6. presses the “Search” button to select an existing Institution from the database, or
7. presses the “New” button to add a new Institution to the database, which is then assigned to the Person (once approved)

8. User (a) selects an existing institution or (b) fills out a request form to create a new institution
9. User enters a note to explain the reason for the change
10. User presses the “Summary” button to review the changes
11. User presses “Edit” to repair any inaccuracies (optional)
12. User presses the “Done” button to submit the updates / request
13. The new customer record is submitted for processing into the master database
14. A new entry is added to the Updates List
15. The user checks the status of his/her request in the Updates List (where approval steps are required)

6.4.8.5.4 Steps for Adding a New Customer (Institution):

1. User opens the Update Request module and presses the plus “+” icon at the top right of the Updates List
2. User selects “New Institution” from the menu of options
3. User fills in required information about the new customer in both information sections: Institution, Note
4. User fills in optional information about new customer (optional)
5. User enters a note to explain the reason for the change
6. User presses the “Summary” button to review the changes
7. User presses “Edit” to repair any inaccuracies (optional)
8. User presses the “Done” button to submit the updates / request
9. The new customer record is submitted for processing into the master database
10. A new entry is added to the Updates List
11. The user checks the status of his/her request in the Updates List (where approval steps are required)

6.4.8.6 Assumptions

1. User has permissions to request customer data change requests

6.4.9 Planner

6.4.9.1 Interfaces to Other Modules > Subsections

- Search > Customer Card
- Warehouse > Transaction Form
- Orders > Order Form
- Orders > Order Form > Order Template

6.4.9.2 Fields and Interactions

6.4.9.2.1 Calendar

Field Name	Description	Constraints	Required
Calendar	Displays days of the month in Month Format – clicking on a date populates the Activity List with all activities scheduled for that date		No
Today	Highlights the current date and populates the Activity List with all activities scheduled for the current date		No
First Open Day	Highlights the date of the first open day and populates the Activity List with all activities scheduled for the for the first open day		No

6.4.9.2.2 Activity List

Field Name	Description	Constraints	Required
Customer Name	Displays Person Full Name or Institution Name in the first row of each entry on the list, if a customer activity	Read only	No
Activity Type	Displays the Activity Type in the second row of each entry on the list	Read only	Yes
Address	Displays the address of the customer or location of the activity, if available, in the third row of each entry on the list	Read only	No
Activity Status Icon	Indicates the status of each activity via unique combination of color and image (<i>Fig. 75</i>)	Read only	Yes

6.4.9.2.3 Extended Activity List

Field Name	Description	Constraints	Required
Date From	The date on / after which activities can be queried and will be displayed	Will not search or display activities before this date	

Field Name	Description	Constraints	Required
Search Field	Allows the user to enter keywords to find matches and filter the Activity List to display relevant results (matches)	Valid keywords are limited to Person Last Name or Institution Full Name	
Customer Name	Displays Person Full Name or Institution Name in the first row of each entry on the list, if a customer activity	Read only	No
Activity Type	Displays the Activity Type in the second row of each entry on the list	Read only	Yes
Address	Displays the address of the customer or location of the activity, if available, in the third row of each entry on the list	Read only	No
Activity Status Icon	Indicates the status of each activity via unique combination of color and image (<i>Fig. 75</i>)	Read only	Yes

6.4.9.2.4 Activity Form (New)

Field Name	Description	Constraints	Required
Date	Activity date, selected from date picker		Yes
Time From	Activity start time, selected from time picker	30 min increments	No
Time To	Activity end time, selected from time picker	30 min increments	No
Activity Type	Activity category, selected from dropdown list		Yes
Activity Weight	% of day assigned to activity, selected from dropdown list (applies conditionally, depending on the type of activity selected)	Not visible if the activity type doesn't require it	Yes
Customer	Name of customer (Person name or Institution name), selected from a dialogue box with list of customers and free text search field (applies conditionally, depending on the activity type selected)	Not visible if the activity type doesn't require it	Yes
Info button	Opens a third pane in the split screen view to show Customer Detail of the selected customer	Requires a customer be selected	No
Note	Free text field		No
Save	Saves activity data (Author, Customer and Date)		
Report Call	Opens a screen containing a list of Call Report templates that, when selected, open a specific questionnaire	Not visible if the activity type doesn't require it	
Delete	Deletes the activity from the form and from the activity list		

6.4.9.2.5 Activity Report (Call Report)

Field Name	Description	Constraints	Required
Back	Returns the user to the list of questionnaires	Possible only for new contact reports (create new mode)	No
Cancel	Exits the questionnaire without saving	Possible only for saved contact reports (edit mode)	No
Save	Saves the incomplete contact report in its current state		No
Done	Closes the incomplete contact report		No
Finish CR	Saves and closes the completed contact report	All conditions must be met	Yes
Next	Displays the next question in the sequence	Validation of the previous step	Yes
Accept	Accepts a change of answer to a previous question; deletes all subsequent answers; new sequence must be followed		No
Note	Optional (based on configuration)	Must be enabled in AdminTool settings	No

6.4.9.3 Preconditions

1. Activity types have been set up and are available to the user.

6.4.9.4 Postconditions

1. An activity is saved to the Planner

6.4.9.5 Normal Flow of Operations

1. User creates a new activity for a given day by selecting the date and (optionally) time and the activity type
2. If is a customer activity, the user enters the name of the customer and presses “Save”; customer activities are fixed 30 minute periods.
3. If it is another type of activity, the users (optionally) selects “AM” “PM” or “Full Day” and presses “Save”
4. If it is a customer activity, the user presses “Create contact report” to open the Call Report function (displayed in a new screen) and selects from the available Call Report templates (questionnaires) which he/she then fills out and submits, thus completing the required workflow for the saved activity.

6.4.9.6 Alternative Flows

1. In case a missing or invalid value is submitted, the system doesn’t create the activity but displays a list of errors to be corrected before the activity can be saved.

6.4.9.7 Assumptions

1. An activity is still in a state where it is possible to make changes.

6.4.10 Cycle Plan

6.4.10.1 Interfaces to Other Modules > Subsections

None

6.4.10.2 Fields and Interactions

Field Name	Description	Constraints (if roles for editing are assigned to users)	Required
Cycle	Allows the user to select the Cycle he/she wants to view	Only the upcoming cycle can be edited during its open period	No
Tier	Allows the user to propose changes to the Tier of a specific customer	Only the upcoming cycle can be edited during its open period	No
Frequency	Allows the user to propose changes to the Frequency of a specific customer	Only the upcoming cycle can be edited during its open period	No
Comment	A read-only field that displays DM comments accompanying edits to the Rep's proposed Cycle Plan	Comments are for specific customers	

6.4.10.3 Preconditions

1. The user has an assigned active Target Group
2. Customers have assigned Tier and Frequency correlations (default or previously edited)
3. The Cycle Plan is "open" or "editable" (i.e. no lockout is in effect and the user can edit)

6.4.10.4 Postconditions

1. A finished Cycle Plan is submitted to the DM for review and approval
2. After DM review, the Cycle Plan is final and the user can review DM comments where changes were made

6.4.10.5 Normal Flow of Operations

1. In scenarios where users are assigned roles allowing them to propose changes to their cycle plans (adjusting Tier and Frequency of individual customers) following steps apply:
 - 1.1. The Rep opens his/her Cycle Plan (the system will open Cycle Plan for editing at a time specified by the Cycle configuration; it copies data from previous / running cycle)
 - 1.2. The Rep edits the individual entries for each customer in the list. Entries which can be edited are Proposed Frequency and Proposed Tier. All changes are saved to the server when the user clicks the "Save" button.

- 1.3. After all of a Rep's changes are done, the Rep must click "Submit" to send the final plan (with all proposed changes) to his/her DM for approval. If the Rep fails to submit the changes by the cutoff date, the system automatically submits all saved changes on the Rep's behalf. The Rep's Cycle Plan cannot be re-edited while it is in the approval phase.
- 1.4. DMs receive an email notification immediately after a Rep submits his/her Cycle Plan.
- 1.5. In Windows Client, the DM can edit/approve/reject his/her subordinate users' Cycle Plans for the next cycle (month) between the beginning of actual month and the DM's cut-off date (inclusive). The cycle plan must be submitted either manually by rep or automatically by system when rep's cut-off date was exceeded.
- 1.6. By accepting the plan, DMs accepts the Rep's proposals for both Tier (rating) and Frequency. By rejecting, DMs reverts cycle plan to previous approved values, with possible edit of the values. The following conditions shall apply:
 - 1.6.1. Submitting a plan without editing indicates approval (no change is necessary) of the Rep-submitted plan.
 - 1.6.2. Submitting a plan after editing indicates approval of the DM-adjusted plan.
 - 1.6.3. Not submitting ("approving") a plan after review results in automatic rejection of the plan.
 - 1.6.4. The result of submitting is that the Rep's Cycle Plan is now locked and made active for the specific cycle.
 - 1.6.5. The normal course of action for the DM is to review and submit each Rep's Cycle Plan, even if no changes are necessary.
 - 1.6.6. The Cycle Plan information (Tier and Frequency) is tied both to a customer (doctor) and a business unit (BU) with the result that Reps from the same BU view the same Tier and Frequency for the same customer (doctor).
 - 1.6.7. Reps and DMs from a given BU work only with the Cycle Plan information for their specific BU.
2. In scenarios where users are not assigned roles allowing them to propose changes to their cycle plans (adjusting Tier and Frequency of individual customers), but target customer lists and cycle plans are centrally generated by DM's, the following steps apply:
 - 2.1. The DM prepares (creates or edits) the Cycle Plan of each subordinate user in their line (Rep)
 - 2.2. The Rep opens his/her Cycle Plan to view its contents

6.4.10.6 Alternative Flows

1. Exception flow 1 (change of Cycle Plan by DM): If a Rep needs to change his/her Cycle Plan for next cycle after submitting but before DM's cut-off date, he/she must ask the DM to do that for him/her by calling/emailing.
2. Exception flow 2 (administrative change of Cycle Plan): If a Rep needs to change his/her Cycle Plan for current cycle or for next cycle after submitting and after DM's cut-off date, he/she must ask DM to raise a ticket with the administrator to re-open the Cycle Plan for editing.
3. Exception flow 3 (new customers): New doctors added by Rep (and accepted by administrator) are added to:
 - a. Rep's current TG
 - b. Rep's current BU cycle plan (with default Tier "Unclassified" and frequency 1)
 - c. Rep's current TG for the next cycle
 - d. Rep's current BU cycle plan for the next month (with default Tier "Unclassified" and frequency "1")
4. Exception flow 4 (Cycle Plan not processed by DM): If a DM does not process the Cycle Plans of a subordinate Rep for any reason, the Rep's changes are automatically rejected by the system as soon as the DM's cutoff date has passed.
5. Exception flow 5 (Adding a customer to Target group):
 - a. If a Rep adds a customer to his/her Target Group, he can add it to the Cycle Plan for the next cycle if the Cycle Plan has not been yet submitted.
 - b. If a Rep adds a customer to their Target Group after submitting the Cycle Plan or after their Rep's cut-off date, they can add him to the CP for the next cycle only by following exception flows 1 or 2.
6. Exception flow 6 (Rollout): initial values for cycle plan for all reps will be imported from Excel

6.4.10.7 Assumptions

6.4.10.7.1 Frequency and changes to Frequency by Reps:

1. The suggested frequency is generated up-front based on the segment the customer belongs to
2. These frequencies are part of the initial frequency plan based on Novartis segmentation analysis
3. The user (Rep) can adjust these frequencies for their individual customers based on customer insights
4. The user is not required to explain the reason for adjusting the frequency
5. The proposed frequency should reflect the call capacity of every sales rep in their given territory
6. The proposed frequency is what the sales rep commits to deliver and is the basis of measurement

6.4.10.7.2 Tier (rating) and changes to Tier by Reps:

1. The Tier is generated up-front based on the demonstrated potential of the customer
2. The user (Rep) can adjust these Tiers for their individual customers based on customer insights
3. The user is not required to explain the reason for adjusting the Tier
4. The customer Tier should reflect the actual potential of the customer

6.4.10.7.3 Changes to Proposed Frequency and Tier by DMs:

1. Rep's Cycle Plans will be visible to DMs in their Territory Management module in the Windows Client application
2. DMs are required to make comments whenever they edit (reject) a Rep's proposed frequency (e.g. explaining why they rejected a request or changed a rep's plan) or proposed changes to Tier
3. DM comments will show up as read-only text for reps (Fig. 1) in their Cycle Plan
4. When the DM approves a tier change in a Rep's cycle plan, this change is also written back to the doctor's profile. This tier (in doctor's profile) is visible by all reps who can access the doctor's card.

6.4.11 Orders

6.4.11.1 Interfaces to Other Modules > Subsections

- Search > Customer Card
- Planner > Activity Form
- Planner > Activity Report > Questionnaire
- Media > Media File

6.4.11.2 Fields and Interactions

6.4.11.2.1 Orders List

Field Name	Description	Type	Required
Date From	Allows the user to select the date used to sort the Orders List	Date Picker	No
Filter	Allows the user to access filter options for Orders List	Button	No
Filter > Status	Allows the user to filter by order status	Picklist, Multisector	No
Filter > Distributors	Allows the user to filter by order distributor	Picklist, Multisector	No
Filter > Templates	Allows the user to filter by order template	Picklist, Multisector	No
Plus Button	Opens a new Order Form (unfilled)	Button	No

6.4.11.2.2 Order Form

Field Name	Description	Type	Required
Date	Allows the user to select the date in the Order Form	Date Picker	Yes
Institution	Allows the user to select the target customer	Search Dialogue with free text field and picklist	Yes
Customer Info	Allows the user to view the customer card	Button	
Contact	Allows the user enter or select customer employee (pharmacist)	Free Text, Picklist	Yes
Template	Allows the user to select Order Template	Picklist	Yes
Distributor (1)	Allows the user to select primary distributor	Picklist	Yes
Customer ID (1)	Allows the user to enter or select customer ID for primary distributor	Free Text, Picklist	Yes
Distributor (2)	Allows the user to select secondary distributor	Picklist	No
Customer ID (2)	Allows the user to enter or select customer ID for secondary distributor	Free Text, Picklist	No
Select Products	Opens the Order Template	Button	

6.4.11.2.3 Order Template (Generic)

Field Name	Description	Type	Constraints
Brand	Displays the name of the brand for the product	System Text	
Product	Displays the name of the product	System Text	
Price	Displays the price of the product	System Text	
Amount	Allows the user to enter order quantity (number of pieces)	Numeric Selector	Numeric characters
Discount	Allows the user to enter discount amount	Numeric Selector	Numeric characters
{Product Total}	Displays the gross value of the product order (calculated as Amount MULTIPLIED BY Price)	System Text, calculated output	
{Product Discount}	Displays the discount value of the product order (calculated as Amount MULTIPLIED BY Discount)	System Text, calculated output	
Paid/Free Pieces	Allows the user to enter number of free pieces	Numeric Selector	Numeric characters
Edit	Allows the user to edit the order form	Button	
Add Item	Allows the user to add items to the order template	Button	
Summary	Generates the order summary where the user can review and confirm the order	Button	

6.4.11.2.4 Order Summary (Generic)

Field Name	Description	Type	Constraints
Date	Displays date of order creation	System Text	
Institution	Displays the print name and address of the customer, and contact person print name	System Text	
Customer Info	Allows the user to view the customer card	Button	
Order Number	Displays a system generated record ID for the order	System Text	
Order Template	Displays the name of the order template	System Text	
Distributor	Displays the name of the distributor who accepted the order	System Text	
Distributor Code	Displays the Customer ID entered for the distributor	System Text	

Field Name	Description	Type	Constraints
Status	Displays the status of the order	System Text	
Total	Displays the total gross value of the order, in currency	System Text	
Discount	Displays the total discount value of the order, in currency	System Text	
Net Value	Displays the total net value of the order, in currency	System Text	
Product (table)	Displays the names of ordered products	System Text	
Amount (table)	Displays the number of pieces of ordered products	System Text	
Discount (table)	Displays the itemized discounts for ordered products	System Text	
Price in currency (table)	Displays the prices of ordered products	System Text	
Edit Items	Allows the user to edit the order	Button	order state must be new
Submit	Allows the user to submit changes to an order	Button	order state must be new
{Set Status}	Allows the user to change the status of an order by specifying an action: Delete, Send; selecting “Send” changes the status to Sent; selecting “Delete” deletes the order and removes it from the Orders List	Picklist	

6.4.11.3 Preconditions

1. The user has assigned roles for order taking
2. The user has available order templates to access and use
3. Workflow and data entry conditions for available templates have been defined
4. Interfaces, if needed, have been established between the system and distributor systems

6.4.11.4 Postconditions

1. An order has been created
2. An order has been sent to either the distributor or administrator for further processing

6.4.11.5 Normal Flow of Operations

1. The user finds the pharmacy they would like to make an order for in the Search module, or
2. The user finds the pharmacy they would like to make an order for in the Planner module, or
3. The user finds the pharmacy they would like to make an order for in the Orders module

4. The user fills in the order form, completing all required fields, then presses Select Products
5. The user fills in the order template according to its available options, then presses Summary
6. The user reviews the order and confirms it by selecting an action option (set status)
7. The user completes the order by pressing Submit

6.4.11.6 Alternative Flows

1. The user presses the Edit button to edit the order form, then restarts product selection and completes a new order template
2. The user presses the Edit Items button to modify entered values for already selected products in the order template, or to add additional products to the order template, then continues by pressing Summary

6.4.11.7 Assumptions

1. The order is still in a state where it is possible to make changes

6.4.12 Warehouse

6.4.12.1 Interfaces to Other Modules > Subsections

- Search > Customer Card
- Planner > Activity Form

6.4.12.2 Fields and Interactions

6.4.12.2.1 Transaction List

Field Name	Description	Type	Constraints
Date From	Allows the user to select the date used to sort the Transaction List	Date Picker	No
Sigma Button	Allows the user to access the Stock List	Button	No
Plus Button	Opens a new Transaction Form (unfilled)	Button	No

6.4.12.2.2 Stock List

Field Name	Description	Type	Constraints
In Stock Only	Restricts the displayed list to in-stock items only	Toggle	No
{brand}	Name of the brand (product or goods category)	System Text	
{product}	Name of the product or good	System Text	
{SKU}	Stock Keeping Unit ID of the product or good	System Text	
{expiry}	Expiration date of the product or good	System Text	
{quantity}	Number of pieces in stock (assigned to the user's inventory)	System Text	
Magnifying Glass Button	Allows the user to access the Transaction List	Button	No

6.4.12.2.3 Transaction Form

Field Name	Description	Type	Constraints
Date	Allows the user to select the transaction date	Date Picker	
Person Icon	Opens the Person Search dialogue	Button	

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Field Name	Description	Type	Constraints
Person Selector	Allows the user to find and select a customer target	Search Dialogue with free text field and picklist	
Institution Icon	Opens the Institution Search dialogue	Button	
Institution Selector	Allows the user to find and select a customer target	Search Dialogue with free text field and picklist	
Customer Info	Allows the user to view the customer card of selected targets; displayed for each target	Button	
Select Products	Opens the product selection screen	Button	

6.4.12.2.4 Product Selection

Field Name	Description	Type	Constraints
Brand	Displays the name of the brand or category for the product or good	System Text	
Product	Displays the name of the product or good	System Text	
Batch No.	Displays the product or good's SKU	System Text	
Price	Displays the price of the product or good	System Text	
Expiration	Displays the expiration date of the product or good		
Amount	Allows the user to enter order quantity (number of pieces)	Numeric Selector	Numeric characters
{transaction limit}	Displays the total amount of a product or good that can be given to a customer; calculated field	System Text, calculated	Per business rules or stock limit, whichever is lower
Edit	Allows the user to edit the order form	Button	
Add	Allows the user to add items to the product selection	Button	
Summary	Generates the transaction summary where the user can review and confirm the list of transactions	Button	

6.4.12.2.5 Transaction Summary

Field Name	Description	Type	Constraints
Date	Displays date of transaction creation	System Text	
Transaction ID	Displays the system generated ID of the transaction	System Text	
Transaction Status	Displays the status of the transaction (e.g. In Progress; Finished)	System Text	
Transaction Type	Displays the operation type of the transaction (e.g. stock out)	System Text	
Customer	Displays the print name and address of the customer, and contact person print name	System Text	
Customer Info	Allows the user to view the customer card	Button	
Owner	Displays the name of the user who created the transaction	System Text	
Product (table)	Displays the names of the product or good	System Text	
SKU (table)	Displays the SKU of the product or good	System Text	
Expiration (table)	Displays the expiration date of the product or good	System Text	
Edit	Allows the user to edit the transaction	Button	Day must be open
Submit	Allows the user to submit changes to a transaction	Button	Day must be open
Delete	Allows the user to delete the transaction	Button	

6.4.12.3 Preconditions

1. The user has assigned roles for warehouse transactions
2. The user has available stock to access and use
3. Constraints for product selection (customer assignment) have been defined

6.4.12.4 Postconditions

1. A transaction has been created
2. The items transferred to the customer are deducted from the list of available stock
3. A record of the transaction is entered into the system record

6.4.12.5 Normal Flow of Operations

1. The user finds the customer they would like to make a transaction for in the Search module, or
2. The user finds the customer they would like to make a transaction for in the Planner module, or
3. The user finds the customer they would like to make a transaction for in the Warehouse module
4. The user fills in the transaction form, completing all required fields, then presses Select Products
5. The user fills in the product selection according to its available options, then presses Summary
6. The user reviews the transaction and completes it by pressing Submit

6.4.12.6 Alternative Flows

1. The user presses the Edit button to edit the product selection, then presses Summary and Submit to update the transaction
2. The user presses the Add button to add additional products to product selection, then completes the values (amount), then presses Summary and Submit to update the transaction

6.4.12.7 Assumptions

1. The transaction is still in a state where it is possible to make changes

6.4.13 Expenses

6.4.13.1 Interfaces to Other Modules > Subsections

- Search > Customer Card

6.4.13.2 Fields and Interactions

6.4.13.2.1 Expense List

Field Name	Description	Type	Constraints
Date From	Allows the user to select the date used to sort the Expense List	Date Picker	No
List Button	Allows the user to switch the view to Period View	Button	No
Period	Allows the user to select the display period	Picklist	
Plus Button	Opens a new Expense Form (unfilled)	Button	No

6.4.13.2.2 Expense Form

Field Name	Description	Type	Constraints
Expense	Allows the user to record an expense; toggles the form to expense entry view	Button	
Advance	Allows the user to record an advance (e.g. cash allowance); toggles the form to advance entry view	Button	

6.4.13.2.3 Expense Form – Record Expense (Generic)

Field Name	Description	Type	Constraints
Date	Displays date of expense record creation for an expense	Date Picker	
Type	Allows the user to select the type of expense	Picklist	
Cost Center	Allows the user to select the cost center from which expense is drawn	Picklist	
Person Selector	Allows the user to find and select a customer target	Search Dialogue with free text field and picklist	
Institution Icon	Opens the Institution Search dialogue	Button	

Field Name	Description	Type	Constraints
Institution Selector	Allows the user to find and select a customer target	Search Dialogue with free text field and picklist	
Customer Info	Allows the user to view the customer card of selected targets; displayed for each target	Button	
Amount	Allows the user to enter the amount	Text Field	Numeric values
Currency	Allows the user to select the currency	Picklist	
Paid by Credit Card	Allows the user to indicate whether the expense was paid by company credit card	Checkbox	
Description	Allows the user to enter a reason or note for the expense	Text Field	
Attachments	Opens menu of options allowing the user to add photographs to the expense record	Button	
Photo – Take New	Opens the camera (OS-native hardware component); after user takes the photo, additional options are presented (OS-native controls)	Button	
Photo – Take New > Retake	Allows the user to take another photo	system dialogue	
Photo – Take New > Use Photo	Adds the photo as an attachment	system dialogue	
Photo – Choose Existing	Opens the device photo library	Button	
Photo – Choose Existing > Photo Library	Presents photos from the photo library	system dialogue	
Save	Saves the operation	Button	
Delete	Deletes the operation	Button	

6.4.13.2.4 Expense Form – Record Advance

Field Name	Description	Type	Constraints
Date	Displays date of expense record creation for an advance	Date Picker	
Type	Allows the user to select the type of advance	Picklist	
Amount	Allows the user to enter the amount	Text Field	Numeric values

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Field Name	Description	Type	Constraints
Description	Allows the user to enter a reason or note for the expense	Text Field	
Save	Saves the operation	Button	
Delete	Deletes the operation	Button	

6.4.13.2.5 Expense Summary – Expense (State: Editable; Day is Open)

As described above in Sec. 6.4.7.2.3

6.4.13.2.6 Expense Summary – Advance (State: Editable; Day is Open)

As described above in Sec. 6.4.7.2.4

6.4.13.2.7 Expense Summary – Expense (State: Closed)

Field Name	Description	Type	Constraints
Date	Creation date	System Text	
Type	Expense type	System Text	
Cost Center	Cost Center	System Text	
Target Persons	Customer target of the type Person	System Text	
Target Institutions	Customer target of the type Institution	System Text	
Amount	Amount in currency	System Text	
Paid by Credit Card	{ Yes } { No }	System Text	
Description	User entered Text	System Text	
Owner	User who created the operation	System Text	
Attachments	Photos attached to the record	File	

6.4.13.2.8 Expense Summary – Advance (State: Closed)

Field Name	Description	Type	Constraints
Date	Creation date	System Text	
Type	Expense type	System Text	

Field Name	Description	Type	Constraints
Amount	Amount in currency	System Text	
Description	User entered Text	System Text	
Owner	User who created the operation	System Text	

6.4.13.3 Preconditions

1. The user has assigned roles for creating expense records
2. The user has assigned expense types and cost centers
3. The user has assigned budgets

6.4.13.4 Postconditions

1. An expense record has been created

6.4.13.5 Normal Flow of Operations

1. The user finds the customer they would like to record an expense for in the Search module, or
2. The user finds the customer they would like to record an expense for in the Expenses module
3. The user fills in the expense form, completing all required fields, then presses Save

6.4.13.6 Alternative Flows

1. The user presses the Delete button to delete the operation and remove the expense record

6.4.13.7 Assumptions

1. The expense record is still in a state where it is possible to make changes

6.4.14 Media

6.4.14.1 Interfaces to Other Modules > Subsections

- Search > Customer Card
- Planner > Activity Report > Questionnaire

6.4.14.2 Fields and Interactions

Field Name	Description	Type	Constraints
Download All New	Downloads all available media files	Button	
Update All	Updates all available media files	Button	
Icon	File icon	Image	
Version	File version	System Text	
File Size	File size in MB; displays two decimal places	System Text	
Date Added / Updated	File publication date; format MM/DD/YYYY	System Text	
Release Notes	Publisher's notes	System Text	
Download	Downloads the file	Button	
Open	Opens the file	Button	Publishing rules
Update	Updates the file (replaces the file with a new file)	Button	

6.4.14.3 Preconditions

1. The user has assigned roles for accessing media content
2. The user has assigned media files

6.4.14.4 Postconditions

1. The user can access published / assigned media files

6.4.14.5 Normal Flow of Operations

1. The user opens the Media module and downloads all available media files
2. The user opens the media files to view them in the media module

6.4.14.6 Alternative Flows

1. The user updates all media files requiring an update
2. The user opens media files bound to Activity Report questionnaires from inside the questionnaire

6.4.14.7 Assumptions

2. The media files are valid and accessible per publishing rules

6.4.15 My Work

6.4.15.1 Interfaces to Other Modules > Subsections

- Search > Customer Card
- Planner > Activity Form
- Orders > Order Form

6.4.15.2 Fields and Interactions

6.4.15.2.1 My Work List

Field Name	Description	Type	Constraints
Date to	Allows the user to select the date used to sort the My Work List	Date Picker	
Status	Displays the status of the selected date (Closed, Not Closed)	System Text	
Reason	Displays the reason for the status	System Text	
Connect to Server	Switches the application to online mode (default)	Button	Device must be connected to the internet
Use Synced Data	Switches the application to offline mode (exception)	Button	
Open	Displays the list of unsubmitted scheduled activities	Button	
Activities	Displays the list of activities submitted in offline mode	Button	
Orders	Displays the list of orders created in offline mode	Button	
List Item	Displays the scheduled date of the activity (MM/DD/YYYY), Print Name of customer, Activity Type, customer address or workplace, and activity status icon	System Text	
Sync Now	Synchronizes the application with the server	Button	
Last Sync Date	Date and time of last synchronization	System Text	Device must be connected to the internet
Plus Button	Allows the user to create a new activity or order	Button	
Plus Button > Activity	Opens the Activity Form	Button	Device must be in online mode
Plus Button > Order	Opens the Order Form	Button	

6.4.15.2.2 Activity Form

As described in Sec. 6.4.3.2.4

6.4.15.2.3 Order Form

As described in Sec. 6.4.5.2.2

6.4.15.2.4 Preconditions

1. User has assigned database of customers
2. User has planned activities which need to be completed
3. My Work module is enabled

6.4.15.2.5 Postconditions

1. The user has completed all outstanding / incomplete activities and orders
2. The Planner module is up to date with completed activities

6.4.15.2.6 Normal Flow of Operations (online)

- A. User opens the My Work module from the home screen
- B. User reviews the list of open items
- C. User creates required activity reports for unsubmitted activities
- D. User creates new activities
- E. User creates new orders

6.4.15.2.7 Alternative Flow of Operations (offline)

- A. User opens the My Work module from the home screen
- B. User reviews the list of open items
- C. User creates required activity reports for unsubmitted activities
- D. User creates new orders
- E. User synchronizes changes to the server

6.4.16 Dashboard

6.4.16.1 Interfaces to Other Modules > Subsections

None

6.4.16.2 Fields and Interactions

Field Name	Description	Type	Constraints
Refresh	Refreshes reports by calling data from the server	Button	
Report Icon	Opens the selected report	Button	

6.4.16.3 Preconditions

1. Structured reports are already prepared on the server
2. The Dashboard module and embedded components are configured to consume and display server data
3. Reporting data are available
4. The Dashboard module is enabled

6.4.16.4 Postconditions

1. The user the ability to view graphical charts representing selected data according to a pre-defined format, layout, and behaviour

6.4.16.5 Normal Flow of Operations (online)

1. User opens the Dashboard module from the home screen
2. User reviews the list of available charts
3. User selects a chart to view
4. User refreshes Dashboard to call updates from the server

6.4.16.6 Alternative Flow of Operations (offline)

1. User opens the Dashboard module from the home screen
2. User reviews the list of available charts
3. Refresh is not an available option when offline

6.4.17 Tools

6.4.17.1 Interfaces to Other Modules > Subsections

None

6.4.17.2 Fields and Interactions

Field Name	Description	Type	Constraints
Source Period	Source period for source data	Picklist	
Destination Period	Destination period for source data	Picklist	
Target Groups	Section label	System Text	
Source	Source period target group	Picklist	Defined by source period
Destination	Destination period target group	Picklist	Defined by destination period
Copy Data	Allows the user to copy data	Button	
Profiles	Section label	System Text	
Profile Type	Allows the user to select the profile type	Picklist	
Source	Source period profiles	Picklist	Defined by source period
Destination	Destination period profiles	Picklist	Defined by destination period
Copy Data	Allows the user to copy data	Button	

6.4.17.3 Preconditions

1. User has role permissions assigned to copy period data for target groups and profiles
2. Tools module is enabled

6.4.17.4 Postconditions

3. Target groups and/or profiles are copied from one period to another

6.4.17.5 Normal Flow of Operations

1. User opens the Tools module from the home screen
2. User selects source and destination periods
3. User selects source and destination target groups
4. User copies data

5. User selects profile type
6. User selections source and destination profiles
7. User copies data

6.4.18 Settings

6.4.18.1 Interfaces to Other Modules > Subsections

None

6.4.18.2 Fields and Interactions

Field Name	Description	Type	Constraints
System Information	Label	System Text	
Server URL	Target URL for server (build URL)	System Text	
Environment	Application environment	System Text	
Application Version	Application version number	System Text	
Database Version	DB version number	System Text	
Database Size	Storage required by DB (total space used)	System Text	
Available Storage	Storage remaining on device	System Text	
Look & Feel	Label	System Text	
Select Theme	{Dark} {Light}	Button	
Active Target Group	Label	System Text	
Target Group	Picklist (dropdown)	Picklist	Requires role permissions
Save	Saves changes		
Support	Label	System Text	
Email	Email address of support operator	Link	
Reset	Label	System Text	
Reset All Content and Settings	Resets the application, deleting the database and settings of the user	Button	Requires role permissions
User account	Label	System Text	
Change password	Opens a dialogue that allows the user to change their password; contents of this dialogue are described below	Button	Requires role permissions
Previous Password	User enters current password	Text Field	Requires role permissions

Field Name	Description	Type	Constraints
New Password	User enters new password	Text Field	Requires role permissions
Verify Password	User enters new password again	Text Field	Requires role permissions
Cancel	Cancels the operation and closes the dialogue	Button	Requires role permissions
Apply	Confirms the operation and closes the dialogue	Button	Requires role permissions

6.4.18.3 Preconditions

1. Settings module is enabled

6.4.18.4 Postconditions

1. Settings are changed

6.4.18.5 Normal Flow of Operations

None

6.4.19 Messages

6.4.19.1 Interfaces to Other Modules > Subsections

None

6.4.19.2 Fields and Interactions

6.4.19.2.1 Message List

Field Name	Description	Type	Constraints
Message List	Displays a list of Messages. Clicking on a message displays the message in the Message Screen	Tab	
Subject	Subject line of the message	System Text	
Description	Description text for the message	System Text	

6.4.19.2.2 Message Screen

Field Name	Description	Type	Constraints
Author	Displays the name of the message author	System Text	
Created	Displays the date and time of message publication	System Text	
Subject	Displays the subject line of the message	System Text	
Message	Displays the text of the message	System Text	
OK	Marks the message as read	Button	

6.4.19.3 Preconditions

1. User has assigned role permissions to view messages

6.4.19.4 Postconditions

1. Messages are read

6.4.19.5 Normal Flow of Operations

1. User opens the Messages module from any screen in the application
2. User clicks on a message to view it
3. User clicks OK to mark the message as read

7 Roles and Responsibilities

CIT *Solution Delivery Lifecycle* Procedure, describes the Roles and Responsibilities for developing, verifying, and implementing a Solution. Additional responsibilities relevant to this document are:

Add rows as necessary. If there are no document specific roles, delete the Table and change the second sentence above to:

“There are no additional roles specific to this document.”

Role	Responsibilities
Business Analyst / QA	Analyze business requirements, document solution, verify fitness for use
Account Manager	Manage business relationship, document requirements, administer system
Solution Architect	Design technical solution, document specifications
Lead Developer	Develop, test, and verify technical solution (architecture spec.), Testing and Verification
Developer	Develop, test, and verify technical components (customization spec.), Testing and Verification
System Manager	Manage technical teams, Scheduling
System Technician	IT support for technical infrastructure

8 Terms and Definitions

The CIT *Glossary of Terms* maintains the common terms in this document. Also identify any system or solution specific glossaries. Additional terms and definitions specific to this document are included below:

Include terms and acronyms. Add rows as necessary. If there are no document specific terms, delete the Table and change the second sentence above to:

“There are no additional terms and definitions specific to this document.”

Term or Acronym	Definition
Tablet Client	Native iOS and Android applications used to access Inception CRM on iPads and Android tablets, supporting the work of FF users (Reps) in the field.
Windows Client	A local application used to access Inception CRM on a Windows PC device, supporting the work of FF managers.
Web Reports	A web application used to access Inception Reporting Services using a standard desktop browser, supporting the work of managers.

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Term or Acronym	Definition
AdminTool	A smart client application used to access Inception Administration Services using a Windows PC device, supporting the work of system administrators.
FF	Field Force
FS	Functional Specification
URS	User Requirements Specification
SQL	Structured Query Language
COTS	Commercial Off The Shelf
CRM	Customer Relationship Management

9 Supporting References

Include supporting references explicitly mentioned in this document, excluding glossaries identified in Section 5. Add rows as necessary. If there are no supporting references, delete the Table and add the following text:

“There are no supporting references specific to this document”

Identifier	Title
URS-001	

10 Revision History

Update this table each time this document is revised. Where possible, include a Change Number or Project related to the document change. Entries should provide the reader with only an indication of what changed. Include section where a change took place. Add rows as necessary.

Version	Version Date	Revisions
1.0		Enter “Initial Release” or, if this document is replacing a previous document(s) as a release 1.0 of a new document, identify the predecessor documents.

Appendix X: Name of Appendix

Enter any supporting information best suited for an appendix. If there is no need for an appendix, remove this header and the page break before it. If there is only one appendix, recommend changing “Appendix X:” to “Appendix:”