



PRISM LIFE SCIENCES LIMITED | SALES FORCE AUTOMATION

Software Requirement Specifications

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This SRS/BRD is the DRAFT and 1st cut. It's to define the requirement of the automation of the field activity of PMT, it also concentrates on the capabilities required by stakeholders and their needs while defining high-level product features. The detailed requirements of the Prism's Field Force Automation are provided in this document.

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SOFTWARE REQUIREMENTS SPECIFICATION

1 INTRODUCTION

The introduction of the Software Requirements Specification (SRS) provides an overview of the entire SRS with purpose, scope, definitions, acronyms, abbreviations, references and overview of the SRS. The aim of this document is to gather and analyze and give an in-depth insight of the complete Automation **requirement of the Tracking of DEs, Doctor's Detailing done, Conduct Survey & to build Various Business Intelligence into the software system** by defining the problem statement in detail. Nevertheless, it also concentrates on the capabilities required by stakeholders and their needs while defining high-level product features. The detailed requirements of the **PMT's Automation** are provided in this document.

1.1 PURPOSE

The purpose of the document is to collect and analyze all assorted ideas that have come up to define the system, its requirements with respect to our people & customer. Also, we shall predict and sort out how we hope this software will be used in order to gain a better understanding of the project that may be developed later, and document ideas that are being considered, but may be discarded as the product develops.

In short, the purpose of this SRS document is to provide a **detailed overview of our software requirement**, its parameters and goals. This document describes the project's target audience and its user interface, hardware and software requirements. It defines how our people, customer, stockiest, retailers, internal users and audience see the product and its functionality. Nonetheless, it helps any designer and developer to assist in software delivery lifecycle (SDLC) processes.

1.2 SCOPE

Primarily, the scope pertains to the field force & its features for making Prism's SFA (sales force automation) project go live. It focuses on the company, the stakeholders and applications, which allow **our Marketing & Sales team's tracking & reporting to be fully automated and implemented**.

1.3 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS

Configuration	It means a product which is available and from its catalogue/parameters can be customized.
FAQ	Frequently Asked Questions

1.4 REFERENCES

The references are:

- ✓ MoM Dated 31/03/2018
- ✓ Internal Meeting with PMT
- ✓ HOD's Joint Meeting and Feedback on 21/04/2018 & 22/04/2018
- ✓ Corporate website <http://www.prismile.com>
- ✓ Existing Software (E-Reporting) which is used by PMT in Prism LSL.

1.5 OVERVIEW

The remaining sections of this document provide a general description, including characteristics of the users of this project, the product's usage, and the functional and data requirements.

General description of the project is discussed in [Section 2](#) of this document. [Section 3](#) gives the functional requirements, data requirements and constraints and assumptions made while designing this SRS/BRD. It also gives the user viewpoint of the needed solution. Section 3 also gives the specific requirements of the solution. Section 3 also discusses the external interface requirements and gives detailed description of functional requirements. [Section 4](#) is for supporting information.

2 OVERALL DESCRIPTION

This document contains the problem statement that the current system is facing which is hampering the acceleration of growth & opportunities of the company. It further contains a list of the stakeholders and users of the proposed solution. It also illustrates the needs and wants of the stakeholders that were identified in the brainstorming exercise as part of the requirements workshop. It further lists and briefly describes the major features and a brief description of the proposed system.

3 SPECIFIC REQUIREMENTS

The specific requirements are –

3.1 FUNCTIONALITY

3.1.1 INTRODUCTION

This subsection contains the original requirements for the SFA (Sales Force Automation) for Pharma Business of Prism LSL. These requirements are organized by the features and based on continual discussions and also the Gap Analysis and results of UAT as and when will be performed from time to time viz. :

- a. Process 1 : Tracking DE's
- b. Process 2 : Doctor's Meet
- c. Process 3 : Conduct Surveys

3.1.2 SCOPE OF WORK & ASSUMPTION.

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3.1.2.1 TEAM: PRODUCT MARKETING TEAM

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3.1.2.1.1 ROLE: DE (MEDICAL REPRESENTATIVE) USING THE MOBILE APP

- Tour Plan – viewing and execution
- Doctor Call recording
- Pre Call planning and post call documentation
- Promotional Inventory Updating
- Expense Report generation and submission
- KRA – Viewing
- Target v/s Actual Sales and incentive linked to it
- Order Punching

3.1.2.1.2 ROLE: BRANCH HEAD/REGIONAL BRANCH HEAD

- KRA entry for DE's below them
- Sales Planning and Target setting for each DE
- Campaign Creation, Approval and Management
- Product to Doctor Mapping

3.1.2.2 TEAM: PEOPLE MANAGEMENT

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3.1.2.2.1 ROLE: PEOPLE'S PERSON (HR) USING DESKTOP BASED SFA PLATFORM

- Updating daily tour plan for all DE's for a duration of 2 weeks
- Validating daily submission of DE's Tour plan progress
- Validating daily submission of DE's Expense Report submission
- KRA – History to be used as part of appraisal
- Expense – Creating and Updating expense Master to manage pre-approved expenses

3.1.2.3 TEAM: DISPATCH TEAM

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3.1.2.3.1 ROLE: DISPATCH MANAGER USING DESKTOP BASED SFA PLATFORM

- Order Creation, Management and Updating
- Manual Order tracking
- Promotional Inventory tracking
- Stockiest wise Credit Cycle Management

3.1.3 CONFIGUREABILITY OF THE SOLUTION.

- The system shall display all the controls that can be configured by the administrator.
- The system shall allow creation of user & attaching to Patch(s) by selection or marking from the list or dropdowns, to configure.
- The system shall display the available components of the solution which can be configured by our office.
- The system shall enable user with the facility to upload Master & Transactional data for one or more Job/sub-jobs and as per the configuration.
- The system shall notify the user about any conflict in the current configuration thru an alert mechanism.
- The system shall allow the Admin Level User to update the configuration to resolve conflict in the current configuration.
- The system shall allow user to confirm the completion of current configuration
- The system shall maintain logs of activities which are necessary for correction & prevention and audit & investigative reasons

3.1.4 DETAILED CATEGORIZATIONS OF THE PROCESS

The system shall display process categorization to the user.

The system should allow the user to start from where he/she left the process flow.

3.1.4.1 TRACKING DE (MEDICAL REPRESENTATIVE)

- Arrival to Job
- Track Movements as per displacement agreed
- Map Movements with Doctors geolocation
- Geo fencing
- End/Closure of day

3.1.4.2 DOCTORS MEET

- Upload/Update Tour Plan
- Mapping Doctors to Product basket
- Mapping Doctors to Chemist/Stockiest
- Mapping Doctors to Detail Executive
- Capture Pre-call Details
- Capture Call Quality
- Capture Post-Call Details
- Expense booking & Approval

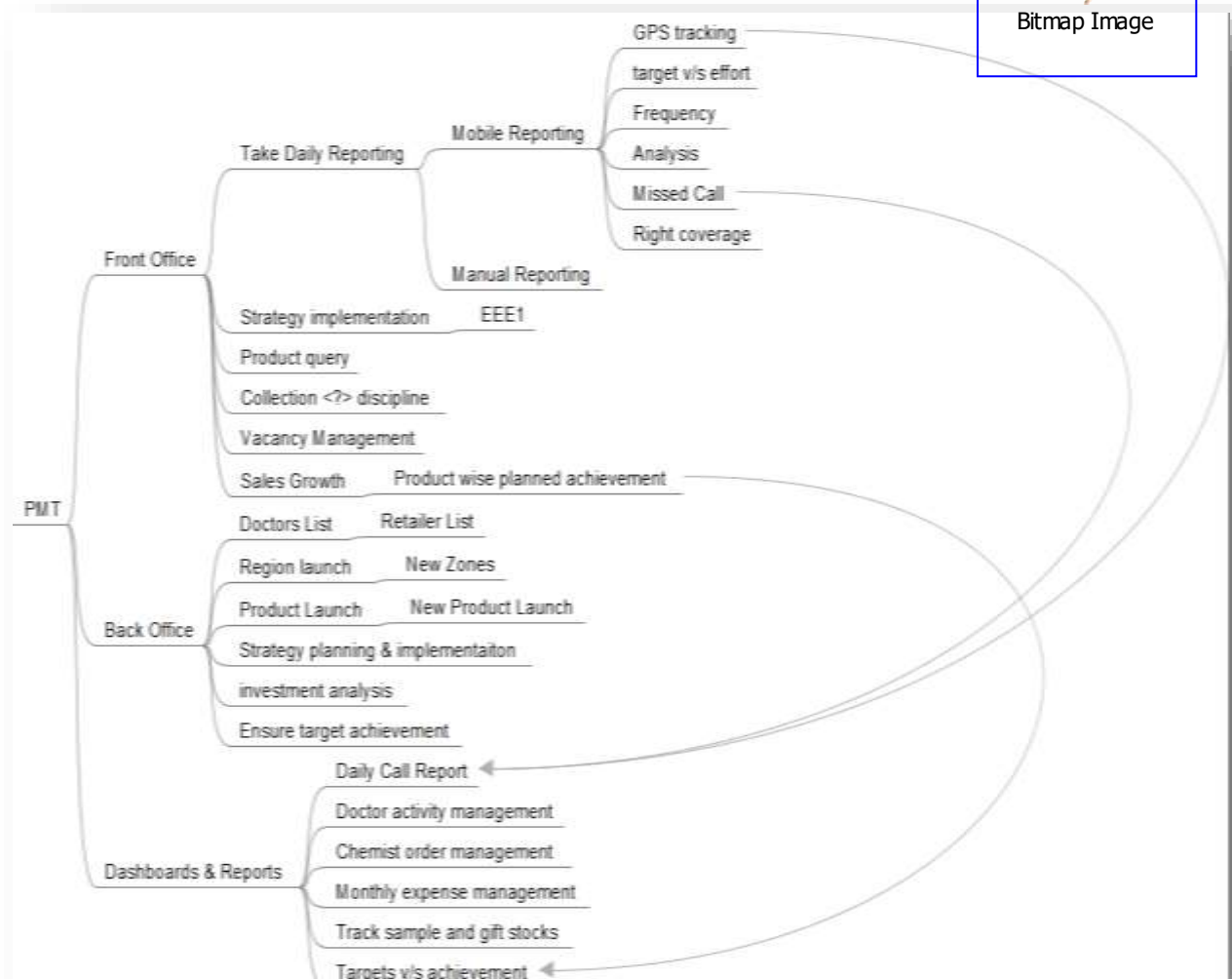
3.1.4.3 CONDUCT SURVEYS

- New Region Launch
- New Product Launch
- Sample Management
- Creation of survey forms
- Initiate a survey

[Theme of the processes, outlining a formal foundation for a "structural" (or "symbolic") object/event representation of the needed solution]



Bitmap Image



3.1.5 PROVIDE DETAILED MAP.

The system shall use map and allow user to view details on maps wherever applicable. Like tacking of DEs (girls & boys) or even providing the location route map for visiting doctors.

3.1.6 ONLINE TRACKING OF ORDERS/ACCOUNTS RECEIVABLES

- The system shall allow user to enter the order information for tracking.
- The system shall display the current outstanding information about the stockiest.

3.1.7 PROVIDE SEARCH FACILITY.

- The system shall enable user to enter the search text on the screen.
- The system shall enable user to select multiple options on the screen to search.
- The system shall display all the applicable filters on the search
- The system shall display only 10 matching result on the current screen.
- The system shall enable user to navigate between the search results.
- The system shall notify the user when no matching product is found on the search.

3.1.8 MAINTAIN USER PROFILE.

- The system shall allow admin user to create profile for our users and client users and set his/her credential.
- The system shall authenticate user credentials to provide access based on the assigned role to his/her the profile.
- The system shall allow user to update his/her profile information using their own access credentials.

3.1.9 PROVIDE CUSTOMER SUPPORT.

- The system shall provide online help and issue management support, as an options for user complaint management.
- The system shall allow user to raise his complaint on his own, without having to login into the system.
- The system shall display as a list of all the online help/ support request/ complaint raise.

3.1.10 EMAIL CONFIRMATION.

The system shall maintain users email information as a required part of user profile. This can be used in future for necessary communication or any other e-mail related requirements like managing/resetting the credential etc.

3.1.11 PROVIDE COMPREHENSIVE SOLUTION DETAILS.

The system shall provide with a comprehensive solution details which can be shared with our Officer(s) for induction and training purpose.

3.2 USABILITY

3.2.1 GRAPHICAL USER INTERFACE

The system shall provide a uniform look & feel across the application and between all the web pages.

The system shall provide storing/retrieval of digital image where ever necessary.

The system shall provide use of icons & toolbars where ever applicable to provide easy understanding across all users.

3.2.2 ACCESSIBILITY

The system shall provide web access only to the web users.

The system shall provide mobile access only to the mobile users.

The solution should be accessible across all the operating platform on all digital gadgets and its upgrades.

3.2.3 USER INTERFACES

The user interface for the web based software shall be compatible to any browser such as Internet Explorer, Mozilla Firefox, and Google Chrome or any other, by which user can access to the system.

The system shall allow the 'Web Users' to use any internet explorer and any operating system.

The system shall allow the 'Mobile Users' to login from any mobile irrespective to his present &/or previous usage.

The system should keep a log of the health of the mobile like battery power, network strength etc.

3.3 RELIABILITY & AVAILABILITY

3.3.1 BACK-END INTERNAL COMPUTERS

The system shall guarantee a 100% uptime as per the ITIL (Information Technology Infrastructure Library) best practices & standards

The system shall all time provide with 3 environments viz. :

- a) The staging Environment – Available to all user champions at all time for them to practice and get trained with sample data.
- b) The Development Environment – Available to technically qualified users and the developers to check and qualify the development and changes asked from time to time.
- c) The Production Environment – Available to the bonafide and authorized users.

3.3.2 INTERNET SERVICE PROVIDER

The system shall be available over internet with 99.999 % availability. For which all the necessary arrangements with an internet service provider at your/our end should be taken care.

3.4 PERFORMANCE

The product shall be based on web & integrated with mobile and has to be run from solution providers server till the on-site economy is ready.

The product shall take initial load of :

- **Operating Region:** To start with one/two Patch/Beat, and to be rolled out gradually across PAN India.
- **No of Users Expected:** 130 users committed from kick off date of the project
- Depending on internet connection strength which also depends on the media from which the solution is run. The performance shall also depend upon hardware components of the user's gadget & PC and infrastructure.

3.5 SECURITY

3.5.1 DATA SECURITY & TRANSFER

The system shall use secure sockets in all transactions that include any confidential customer information.

The system shall automatically log out all user(s) after a period of inactivity.

The system shall confirm completion of all transactions while leaving web browser.

The system shall not leave any cookies on the user's computer containing the user's password.

The system shall not leave any cookies on the customer's computer containing any of the user's confidential information.

The user's web browser shall never display a user's password. It shall always be echoed with special characters representing typed characters.

The system's back-end servers shall never display any passwords. The passwords may be reset but never shown.

The system's back-end servers shall only be accessible to administrators authenticated by solution provider.

The security of all data (including the source provided by client as mentioned in [scope of work](#)) in the system will be the responsibility of the solution provider.

3.5.2 SUPPORTABILITY

3.5.3 WEB & MOBILE BASED INTEGRATED SOLUTION

- There should not be any specific memory requirements, should work on any working computer.
- The computers must be equipped with web browsers such as chrome, Firefox, Internet explorer and all mobile must be having android version 5 (Lollipop) or above with navigation feature.
- The solution must be able to provide a way that allows the client easy access for data exchanges when needed.
- A general knowledge of basic computer skills should be sufficient to use the solution

3.6 ON-LINE USER DOCUMENTATION AND HELP SYSTEM REQUIREMENTS

As the solution is an Integrated & Automation solution, for complete operations of Prism Life Sciences Limited (a) On-line help and (b) issue management system becomes a critical component of the system :-

It shall provide specific operating guidelines and training manuals in required languages, to the user for using the system and within the system.

To provide with an online user help & complaint management system, should be easy to use and independent of the solution's availability.

3.7 INTERFACES

There are many types of interfaces as such supported by the software system namely; User Interface, Software Interface and Hardware Interface.

The protocol used shall be HTTPS.

The Port number used will be 80.

There shall be logical address of the system in IPv4 format.

3.7.1 HARDWARE INTERFACES

Since the application must run over the internet, all the hardware shall require to connect internet will be hardware interface for the system. As for e.g. Modem, WAN – LAN, Ethernet Cross-Cable.

3.7.2 SOFTWARE INTERFACES

1. The Software system shall communicate with the Configurator to identify all the available components to configure the solution.
2. The system shall communicate with Tally (optional) & Prism's ERP system.

This design usually shall be similar to the third party software system, which is widely used over internet transaction mostly using the JSON (JavaScript Object Notation) format, which is a lightweight data-interchange format and is universally accepted.

3.8 BRANDING AND OTHER DISPLAYS

The solution should display PLSL logo and branding details of Prism Life Sciences Limited where ever it's required, indicated and approved.

3.9 LICENSING REQUIREMENTS

<Need to attach if this is in place>

3.10 APPLICABLE STANDARDS

It shall be as per the industry standard.

4 SUPPORTING INFORMATION

Please refer the following document:

1. Feedbacks from Work Shop & Use case analysis.
2. Minutes of Meeting and Change Requirements.
3. Report & Dashboard Requirements.

5 CHANGE PROCESS

No change is permitted to the project scope, the project budget, the schedule or to any approved plan, document, or baseline unless a request for change as per the Format no **PLSL/ITC_F_01_00** is first submitted in writing and approved by the change control board, in accordance with the change control processes described from time to time.

6 APPROVAL

By signing below, I, _____ in my capacity as Project Sponsor approve of this SOFTWARE REQUIREMENTS SPECIFICATION (this “SRS”).

Name:

Title:

Signature

Date Approved

Atanu's Check list and control points.

- a. Send the Budgetary Quote at the earliest for us to initiate the transaction.
- b. Get your NDA signed, in case you have any process at your end, please initiate that.
- c. For the POC to commence, get the following in place by EOD tomorrow the 25th (Wed)
 - a. Master data to be uploaded
 - b. Workflow need to be as per today's business objective of prism
 - c. Data-check needs to be looked at
 - d. Needed alteration on the GUI will be carried out, if need be.
- d. The POC will need to be closed by 30th Monday so that the data can be purged and real data will need to be uploaded.
- e. The pilot should be scheduled for 1st May (Tue - Holiday), for which Prism will have to be entering the master data.
- f. Get your help desk aligned with us – so that your support system also gets checked.
- g. As spoken yesterday, would like to have the complete details for the ChatBot and AI setup as I had detailed on the con-call.