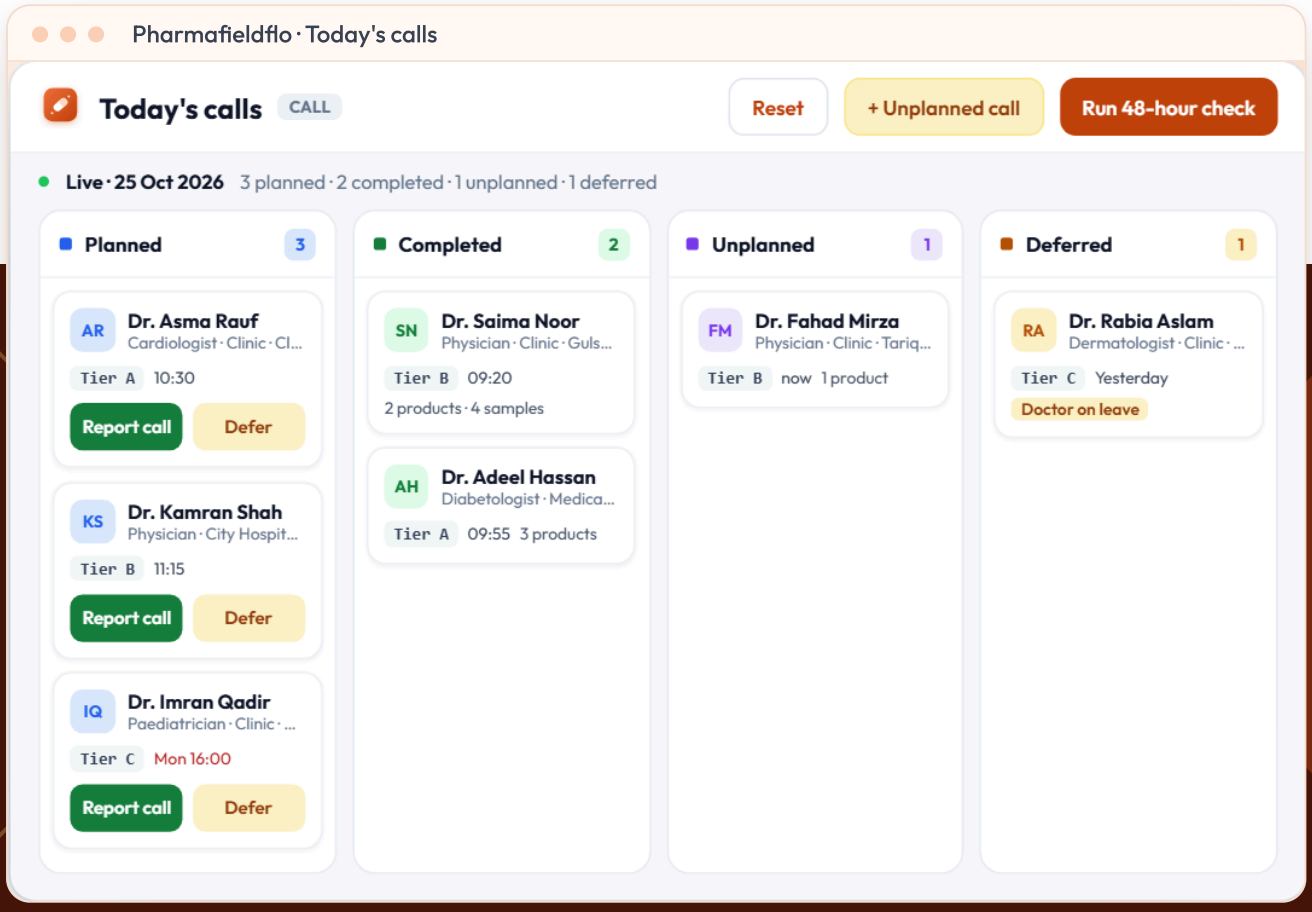
Pharmafieldflo

by Align Business Systems

PHARMA FIELD FORCE

Every doctor call, planned, reported and reviewed.

Monthly call plans, reporting within 48 hours, doctors, activities, samples and gifts — one system for reps, managers and head office.



SIX MODULES, ONE SYSTEM

- Call plans
- Call reporting
- Doctors
- Activities
- Samples & gifts
- Dashboards

ABOUT PHARMAFIELDFLO

Your field force, on one record.



Pharmafieldflo is a pharma field-force system for reps, managers and head office. The plan a rep makes at the start of the month is the same record the manager approves, the rep reports and head office reads in its dashboards.

Every policy — the reporting window, plan lead days, call targets and which modules a company uses — is a setting your admin changes. Exceptions are asked for and approved inside the system: no code change, no redeploy.

48h	4	6
REPORTING WINDOW	CALL STATUSES	MODULES, ONE RECORD

MODULES

Every part of field work, one system.

Call planning
- Copy last month
- Tier visit check
- Plan approval

Call reporting
- 48-hour window
- Unplanned calls
- Deferred with a reason

Doctors & institutes
- Tiers A, B and C
- Visit frequency
- Clinics & hospitals

Activities
- Doctors & products
- Venues and costs
- Honorarium approval

Samples & gifts
- Request & approve
- Dispatch
- Issue on the call

Dashboards & reports
- Drill-down
- Report criteria
- Excel & PDF

THE MASTERS EVERY MODULE READS FROM

Users & roles · Regions & zones · Territories · Products · Sample & gift items · Doctors · Institutes · Venues · Specialities · Holidays · Settings · Approval chains

THE CALL CYCLE · ONE MONTH

One call plan, from the rep to head office.

The plan a rep makes for the month is the same record the manager approves, the rep reports and head office reads. Every call ends with a status, so the numbers always add up.

01 Plan the month
02 Manager approves
03 Visit the doctor
04 Report in 48 hours
05 Unplanned call
06 Auto-deferred
07 Manager review
08 Dashboards

FOUR STATUSES, NOTHING ELSE

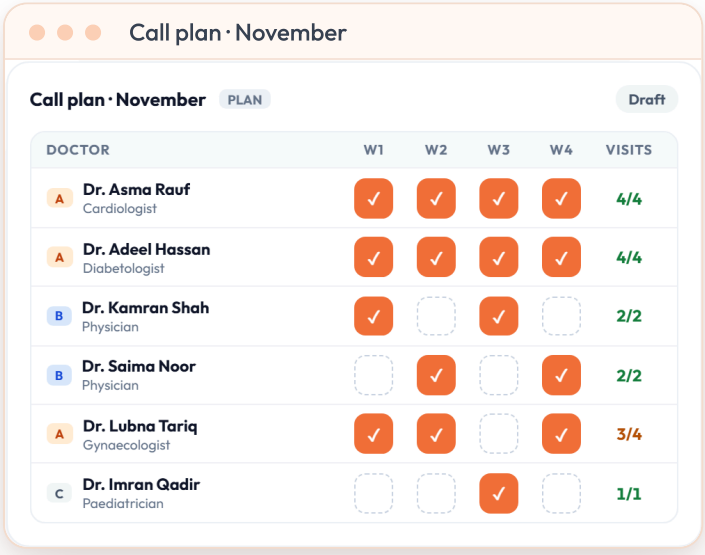
Planned
On the approved plan, not yet reported.

Completed
A planned call, reported with products and samples.

Unplanned
A doctor met off the plan. Always counts as completed.

Deferred
Always with a reason — given by the rep, or by the system.

A planned call nobody reports in time is deferred automatically: **"Not reported in 48 hours"**. Total completed = completed planned calls + unplanned calls.



MONTHLY PLAN

Plan the month in minutes.

- Copy last month, then adjust the weeks
- See at once which doctors are below the visits their tier asks for
- Send it for approval: approved, or sent back with a note
- Changes after approval go through a request to add or move a call

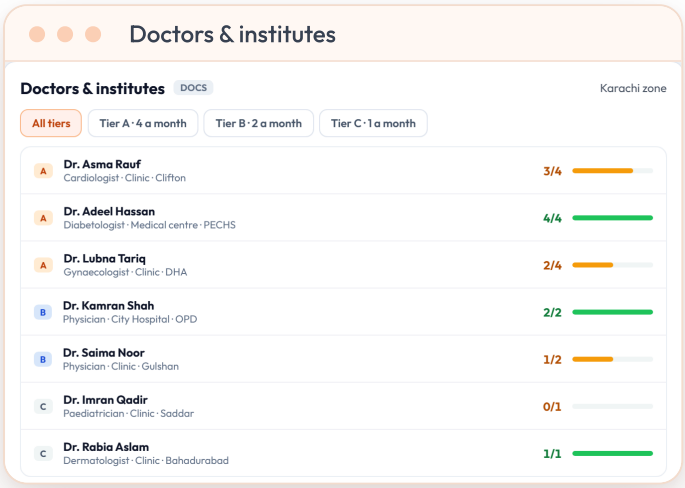
Lead days are settings
Plans open 10 days before the month and lock 3 days before it starts.

DOCTORS & INSTITUTES

Who to see, and how often.

Every doctor carries a speciality, a tier and the institutes they practise at. The tier sets how many visits a month the doctor needs, and the plan checks it.





VISITS A MONTH · SET PER TIER

A	B	C
4 a month	2 a month	1 a month

- Clinics, hospitals and medical centres kept as institutes
- Venues and specialities kept as masters
- Each doctor's history: every call, product, sample and gift

ACTIVITIES · CMES AND ROUND TABLES

Costed, and approved before it is held.

CME **Managing hypertension**

Planned · Hotel banquet hall, Karachi

Doctors invited **3** Product **Cardiozen 5 mg** Institutes **2** Speaker honorarium **Rs 25,000**

USE	ITEM	QTY	UNIT PRICE	DISCOUNT	TAX	TOTAL
Activity	Hall & catering	1	150,000	10,000	16%	**162,400**
Activity	Printed material	50	300	5%	16%	**16,530**
Gift	Desk calendar	40	450	—	—	**18,000**

Gross 183,000 · Discount 10,750 · Tax 24,680 · **Total Rs 196,930**

APPROVAL CHAIN · HONORARIUM INCLUDED

Requested › Manager approved › Head office approved › Held · attendance taken › Honorarium paid

Discount as an amount or a percentage, tax added after it. Gift items go to each invited doctor when the activity is reported held, and show in the doctor's history. Example figures.

SAMPLES & GIFTS

From the warehouse to the doctor.



Samples and gift items are requested, approved, dispatched and issued on the call — every unit tied to a person, a doctor and a call.

01 **Request** by the rep or manager

02 **Approve** its own chain

03 **Dispatch** direct, or on approval

04 **Received** into the rep's stock

05 **Issued** to the doctor, on the call

Warehouse & rep stock

- Stock at the warehouse and with each rep
- Allocation by rep and item
- Samples and gift items kept apart

Dispatch

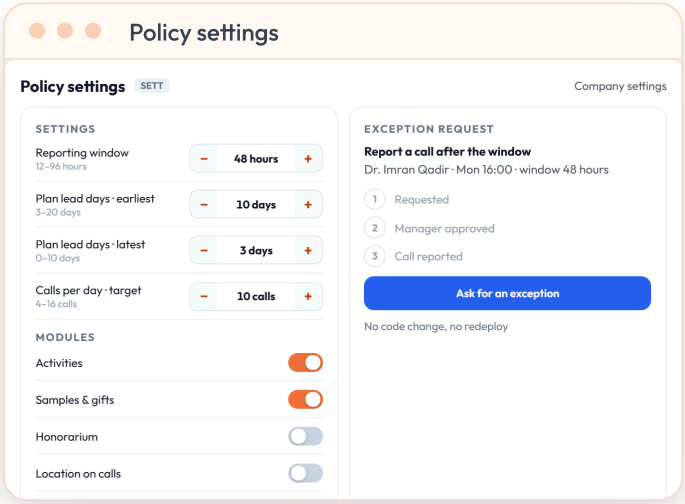
- Direct, or against an approved request
- Can need its own approval
- Partial, with courier and consignment no.

Stock ledger

- Received, dispatched, given
- Adjusted, returned, transferred
- Every issue tied to a doctor and a call

POLICIES & EXCEPTIONS

Every policy is a setting.



Reporting window, plan lead days and call targets are settings with limits. A module switched off disappears from menus, tiles and approvals.

EXCEPTION REQUESTS

- Add or move a call
- Deferral
- Unplanned call
- Doctor list change
- Leave

Each with its own approval chain and time limit.

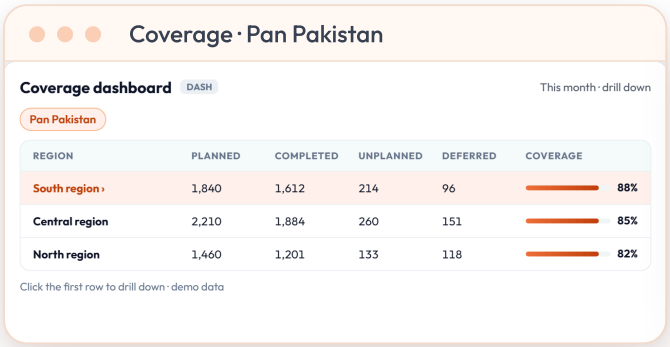
No code change, no redeploy.

DASHBOARDS & REPORTS

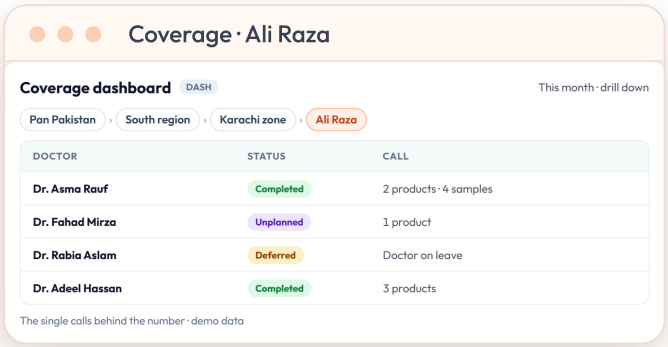
From the whole country down to the single call.

Every number on a dashboard opens the list behind it. Click through region, zone and rep to the call itself: who, when, which products and what was given.

Pan Pakistan › Region › Zone › Rep › The call



START · BY REGION



FOUR CLICKS LATER · THE CALLS

ON THE OVERVIEW DASHBOARD

Completed vs target
Calls completed against the target

Plan compliance
Planned calls actually done

Coverage
Doctors seen out of the list

Frequency
Visits against those the tier needs

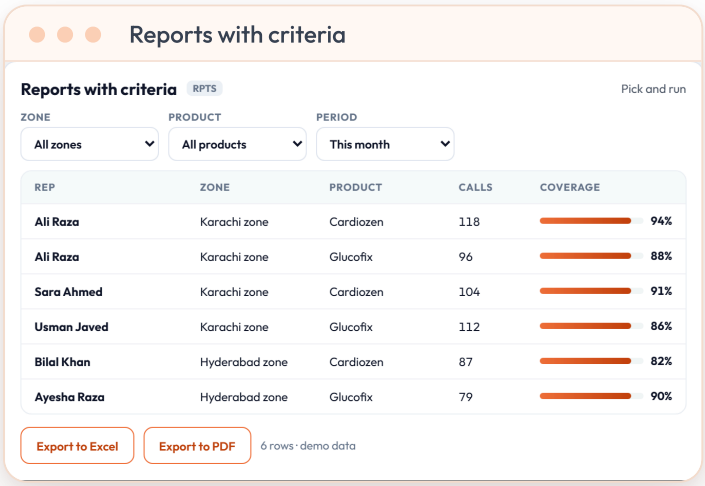
Field days & leave
Days in the field, days on leave

Calls per doctor
How often each doctor is seen

Deferred
With every reason behind them

Joint calls
Calls made with the manager

Each one opens
the list behind the number



REPORTS

Pick the criteria, run the report.

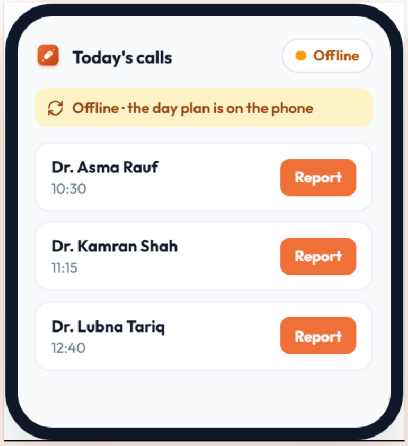
- Criteria by zone, rep, product and period
- The same numbers as the dashboard
- Download to Excel or PDF
- Scheduled reports e-mailed as PDF or Excel to the people you choose

WEB AND MOBILE

A phone app that works offline.

Reps plan and report on the phone; managers approve on the go. The day's plan stays on the phone, so a call can be reported in a basement clinic and synced later.

- Same rules on the web and on the phone
- Sign in with email and password
- Day plan kept on the phone
- Reported calls sync when the signal is back



PLATFORM & SECURITY

Built on the Align platform, controlled like an ERP.

ROLE-BASED RIGHTS ON EVERY SCREEN

Rep | Manager | Regional head | Head office | Admin

SCREEN	CREATE	EDIT	VIEW	APPROVE
Call plan	✓	✓	✓	–
Call report	✓	✓	✓	–
Doctors	–	–	✓	–
Activities	✓	–	✓	–
Samples & gifts	✓	–	✓	–
Reports	–	–	✓	–
Settings	–	–	–	–

RIGHTS PER ROLE, ON EVERY SCREEN

Data scope per role

Own | Team | Unit | All

A rep sees their own calls, a manager their team, head office everything.

Many companies, one platform

Each company has its own users, settings, modules and data. The email a user signs in with decides the company.

Audit stamp on every record

Who created it, who changed it, and when.

Your logo and colours

Each company under its own brand.

WHY PHARMAFIELDFLO

One field force. One system.



From the monthly plan to the dashboard, on one record.

Every policy is a setting

Windows, lead days, targets and modules are changed by your admin, not a developer.

No call unaccounted

Every planned call ends completed or deferred with a reason. The numbers add up.

Drill down to the call

From the whole country through region, zone and rep to the single call.

Works offline

The day plan stays on the phone; calls sync when the signal is back.

An approval at every step

Plans, activities, honorarium, samples and gifts each have their own chain.

Built in house

Discovery, build, rollout and support by one team at Align Business Systems, Karachi.

HOW WE DELIVER

01 Discovery & fit › 02 Product engineering › 03 Implementation › 04 Support & SLA › 05 Insight & optimization

Pharmafieldflo

by Align Business Systems

See Pharmafieldflo in action.

Book a Demo →

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