



BEAT • TRIAL RUN SOP
UNIFIED DIGITAL ECOSYSTEM

TRIAL RUN PLAN · CLIENT AND CLINEXGEN

Beat 15-day pilot: one branch, one team, on your own records

This plan is for your trial owner and the ClinexGen trial lead. Part A says what the pilot proves, what each side prepares, who does what, and how the go/no-go is decided. Part B is the step-by-step walkthrough your users run, with a checkpoint at the end of each step.

Duration 15 days		Scope One branch, one team		Checkpoints 66 in 11 sections		Hands-on time about 9 h 25 min	
Wk 0	D1	D2	D3	D4-8	D8-12	D13-14	D15
Prerequisites A2	Kick-off, configuration check B1, B2	Import, dealer, commercial rules B2-B4	Training all users	Field days and deals B5, B6	Dispatch, cash, installation, service B7-B10	Reports, measures, issue review B11	Go / no-go A9

What the pilot proves

- One real field day: beat plan, visits with a geo check-in, call reports, approvals, expense claims.
- The deal: enquiry, quotation, discount approval, order.
- Cash: dispatch with serials, invoice per milestone, receipts and TDS, dealer commission.
- After the sale: installation and UAT, service calls, contracts and the renewal list.

Marking a checkpoint

- Pass** Beat did what the step expects.
- Fail** Beat did something else. Write what you saw.
- Blocked** The step could not run. Write why.
- Skip** Not run: optional, outside your plan, or In delivery.
- Copy every Fail and Blocked onto the issue log at the end.

Who does the step

Admin	Your administrator (the Super Admin role in Beat)
Manager	The pilot team's manager, who approves
Rep	A field sales executive, on the phone
Dealer	Your channel partner's login
Finance	Invoices, receipts, reimbursements
Stores	Stock and dispatch
Service	Installation and service calls
Trial owner	Your named owner of the pilot
ClinexGen	The ClinexGen trial lead or delivery engineer

Reading the steps

- **Administration > Settings** is a menu path in the sidebar.
- **Add role** is a button or field label on screen.
- **TRIAL Product A** is a value to type. Amounts are test values, never ClinexGen rates or prices.
- *Italic text* is a message Beat shows.

Labels were read from Beat's screens; the trial lead confirms any that differ at kick-off.

A1 Purpose and scope

What the pilot proves, on which plan, for whom, and for how long.

What the pilot proves

That Beat carries one record from the first visit to the last service call in your business, on your own branch, team, price list and discount rules, so that sales, finance, stores and service stop keeping lists that disagree.

ITEM	IN THE PILOT
Plan	The live capabilities of the plan you are evaluating. This plan assumes Enterprise, so every scenario applies; on Standard or Professional, steps outside your plan are marked Skip.
Branch and teams	One branch. One field team: the manager and the reps who report to them. The finance, stores and service users who serve that branch. One dealer. Your administrator.
Duration	15 days, from kick-off on day 1 to the go/no-go meeting on day 15. Prerequisites are done in the week before day 1.
Data	A masked sample of your customers through Beat's own import, the customers the team visits on the field days, and test values for prices and rates.
Where	A trial workspace that ClinexGen hosts for you over HTTPS. Nothing is installed on your servers for the pilot.

OUT OF SCOPE

NOT TESTED	WHY
Single sign-on, online card and UPI collection, government e-invoicing, WhatsApp notifications, electronic signature, inbound email replies	In delivery: built, but not yet proven against the outside service each depends on. Never demonstrated, warranted or bid. Marked Skip in B8.2 and B11.7.
Mock-location or fake-GPS detection; AI next-best-action or suggested orders; a Beat to LedgerFlow AI or ERP data feed; automatic lead routing; parsing of legacy database backups	Roadmap: not in the product today, so not part of a pilot or a go-live scope until they are Live.
A continuous location trail or a live map of reps	Not a Beat feature. Beat verifies the visit at the customer.
Full data migration, other branches, links to your other systems, filing on government portals	Part of go-live, scoped in the proposal.

A2 Before day 1: prerequisites

Done in the week before kick-off. The pilot starts only when both lists are ticked.

YOUR SIDE

ITEM	DETAIL	DONE
Sponsor and trial owner	A sponsor who takes the go/no-go decision, and a named trial owner with time on each pilot day.	
Users	Names, roles and reporting lines for the manager, reps, finance, stores, service and one dealer contact.	
Devices	Each rep: a smartphone with a current browser, location services on, able to install Beat to the home screen. Desk users: a current Edge or Chrome.	
Masters	Products with list price, floor price, tax rate and warranty; your price list; discount limits and approvers; expense policy; territories. Test values are fine for the pilot.	
Masked sample	Your customer list for the pilot branch as a spreadsheet, contacts masked, one owner per row (B3).	
Staff notice and consent	Each rep told in writing, before day 1, that location is captured only at check-in on a physical visit, and why. Location permission given on the phone.	
Written approvals	Any real personal data in the pilot approved in writing; whether email sending may be switched on.	

CLINEXGEN SIDE

ITEM	DETAIL	DONE
Trial workspace	Your own workspace, served over HTTPS. Geo check-in, offline call reports and home-screen install all need HTTPS.	

ITEM	DETAIL	DONE
Accounts	Your administrator's login (Super Admin role); the others are created with you in B2.	
Configuration	Branch, territories, team, numbering, pipeline stages, expense policy, products, price list, discount limits and the test escalation rung, loaded from your lists.	
People	A named ClinexGen trial lead and delivery engineer, and the support desk contact.	
Training	A short session per role on day 3, on the users' own devices.	

A3 Roles and RACI

R does the work, A is accountable, C is consulted, I is kept informed. CG is ClinexGen.

ROLE	WHO	IN THE PILOT
Client sponsor	A senior manager on your side	Agrees the scope, takes the go/no-go decision, signs.
Client trial owner	Named by you	Runs the pilot day to day, marks results, keeps the issue log, signs.
Client users	Manager, reps, finance, stores, service, dealer	Run the Part B steps in their own roles.
ClinexGen trial lead	Named by ClinexGen	Owens this plan, chairs the daily check-in and the go/no-go meeting, signs.
ClinexGen delivery engineer	Named by ClinexGen	Prepares the workspace and configuration, trains users, fixes or works around issues.
ClinexGen support desk	info@clinexgen.com · +91 7338 786 196	Takes issues the trial lead escalates.

ACTIVITY	SPONSOR	TRIAL OWNER	USERS	CG TRIAL LEAD	CG ENGINEER	CG SUPPORT DESK
Scope, success criteria, this plan	A	R	I	R	C	I
Prerequisites on your side	A	R	C	C	I	I
Workspace, accounts, configuration	I	C	I	A	R	I
Training	I	C	R	A	R	I
Field days and deals (B5, B6)	I	A	R	C	C	I
Dispatch, cash, service (B7–B10)	I	A	R	C	C	I
Marking checkpoints, issue log	I	A	R	C	I	I
Fixing issues	I	C	I	A	R	R
Daily 15-minute check-in	I	R	C	A	C	I
Measures before and after	I	R	C	A	C	I
Go / no-go decision	A	R	I	R	I	I
Trial data: deletion or carry-over	A	R	I	R	R	I

A4 Day-by-day plan

Every pilot day ends with a 15-minute check-in between the trial owner and the ClinexGen trial lead. Part B sections are shown against the days they run.

DAYS	WHAT HAPPENS	WHO	OUTPUT
Week before	Prerequisites (A2). ClinexGen loads the configuration. Reps receive the location notice.	Trial owner, CG engineer	Both prerequisite lists ticked
Day 1	Kick-off: this plan, the scenarios and the issue log. Configuration check and users (B1, B2).	All	Users signed in; labels confirmed
Day 2	Customer import and reconciliation (B3); dealer and KYC (B2.5–B2.6); products, stock and rules (B4).	Admin, trial owner, stores	Counts signed; rules in place
Day 3	Training per role, on the users' own devices; Beat installed to each rep's home screen.	Users, CG engineer	Every user has done one practice entry
Days 4–6	Field days (B5). Baseline for the five measures taken on day 4.	Reps, manager	Visits, reports, approvals, claims
Days 5–8	Quotations, approvals and orders (B6), from the field days' leads.	Reps, manager, admin	Orders confirmed

DAYS	WHAT HAPPENS	WHO	OUTPUT
Days 8–11	Dispatch (B7), invoices, receipts, TDS and commission (B8), installation and UAT (B9).	Stores, finance, service	Sale closed; contract on record
Days 11–12	Service calls, escalation, contracts and renewal lists (B10).	Service, manager, reps	Renewal quoted by hand
Days 13–14	Reports, access and security (B11). Measures compared. Issue log reviewed; open items given owners and dates.	Trial owner, CG trial lead	Results and open items ready
Day 15	Go / no-go meeting (A9). Trial data decision recorded.	Sponsor, trial owner, CG trial lead	Signed decision

PART B AT A GLANCE

SECTION	WHAT IT COVERS	DAYS	CHECKPOINTS	TIME
B1	Sign-in and configuration check	Day 1	9	45 min
B2	People, roles and the dealer	Days 1–2	6	45 min
B3	Customer import: a masked sample	Day 2	5	45 min
B4	Catalogue and commercial rules	Day 2	3	30 min
B5	The field day	Days 4–6	11	90 min
B6	Quotation, approval and order	Days 5–8	5	60 min
B7	Dispatch and the installed base	Days 8–9	3	30 min
B8	Invoice, receipt and TDS	Days 9–11	6	60 min
B9	Installation and UAT sign-off	Days 10–11	3	40 min
B10	Service, escalation and renewals	Days 11–12	7	60 min
B11	Reports, access and sign-out	Days 13–14	8	60 min
Total			66	565 min (9 h 25 min)

A5 Test scenarios

Each scenario maps to Beat's own record, from the field to the renewal. The Part B steps give the clicks.

#	SCENARIO	EXPECTED RESULT	PASS CRITERION	STEPS
S1	The field day	Plan approved; physical visits geo-checked; reports approved by the manager; the claim priced from filed visits	No physical visit submitted without a check-in; no approval by its own requester	B5.3–B5.10
S2	A call report without signal	Saved on the phone and sent on reconnection	Report in the list after reconnection, nothing lost	B5.6
S3	Enquiry to lead	A call report becomes a lead; a second active lead for the same customer and product is caught	Lead created; duplicate caught	B5.7
S4	Quotation priced from your list	Price from the customer's price list; tax from the place of supply	Price and tax as configured	B6.1
S5	Discount over the limit	Sending held until an approver, not the rep, approves	Held, approved by someone else, then sent	B6.2
S6	Price below the floor price	Refused outright	Refused	B6.3
S7	Order from the accepted quotation	Lines carried over, with payment milestones	Nothing re-keyed	B6.4
S8	Dispatch with serials	Challan only against an order; serials become installed units with warranty from delivery	Every serial an installed unit	B7.1–B7.2
S9	Invoice, receipt and TDS	Invoice per milestone; receipt plus tax deducted closes it; collections queue and ageing	Invoice closed in full; TDS not shown as arrears	B8.1–B8.4
S10	Dealer: KYC and commission	Inactive until KYC; sees only what it sourced; commission only on money received	All three hold	B2.5–B2.6, B8.6

#	SCENARIO	EXPECTED RESULT	PASS CRITERION	STEPS
S11	Installation and UAT sign-off	Go-live held until UAT signed; closing the sale creates the contract	Order delivered; contract created	B9.1–B9.3
S12	Service call and escalation	Cover from dates; one rung fires once; resolved and closed are separate	All three hold	B10.1–B10.4
S13	The renewal list	Units leaving cover listed; the renewal quoted by a person	Both test units listed; no automatic quotation	B10.6–B10.7
S14	Access, audit and security	Each role sees its scope; every approval traceable; session rules hold	All checks pass	B2.4, B11.3–B11.5
S15	Customer import	Faults reported before saving; counts reconcile; duplicates stopped	Counts per owner equal the file	B3.3–B3.5

A6 Data handling and privacy (DPDP Act, 2023)

How pilot data is treated under India's Digital Personal Data Protection Act, 2023.

The rules for this pilot

- **You are the data fiduciary.** ClinexGen processes pilot data only to run this pilot, on your instructions.
- **Masked or test data by default.** Real personal data is used only with your written approval, and then as a masked sample: contact names, mobiles and emails stay masked.
- **Named users only.** Access is limited to the pilot users named in A2; on the ClinexGen side, to the trial lead and the delivery engineer.
- **Location at check-in only.** A rep's location is captured only when they check in on a physical visit, and only after they have been told so in writing. Beat keeps no continuous trail and no live map.
- **No one contacted by mistake.** Email sending stays off unless you approve it; test records use @example.com addresses.
- **After the go/no-go.** Either the trial data is deleted and ClinexGen confirms the deletion to you in writing within 30 days of the decision, or, if you sign, it is carried into go-live. The choice is recorded in A9.
- **Test values go.** Test prices, rates and contracts are removed or replaced with approved ones before any real use.

A7 Success and exit criteria

Measurable, and checked from Beat's own records. The five business measures are recorded, not promised.

#	CRITERION	TARGET TO DECLARE SUCCESS	EVIDENCE
1	Coverage	All 66 checkpoints marked; none left blank	Part B marks
2	Main flow	Scenarios S1 to S15 pass, or each Fail has an agreed fix with an owner and a date	A5, issue log
3	Access control	B2.4, B2.6 and B11.3 pass: each login sees only its scope	B2.4, B2.6, B11.3
4	Maker and checker	100% of approvals (plans, reports, claims, discounts, commission) by someone other than the requester	B11.4 audit trail
5	Field proof	Every physical visit shows Verified on site or Outside the geo-fence; none submitted without a check-in	B5.4, B11.1
6	Commercial control	Price from the price list; below the floor price refused; over the limit held for approval	B6.1–B6.3
7	Cash	Receipt plus TDS closes the invoice; commission only after money is received	B8.3, B8.6
8	Installed base	Every dispatched serial is an installed unit with warranty from delivery	B7.2
9	Renewals	Both test units on the renewal lists; no automatic quotation	B10.6–B10.7
10	Traceability	Every pilot action in the audit trail with who and when	B11.4
11	Reporting	Reports and dashboards match the pilot records	B11.2
12	Customer import	Both planted faults reported before saving; counts per owner equal the file	B3.3–B3.4
13	Duplicate control	A merged duplicate stays as an alias with its reason; the second load is stopped	B3.5
14	Session security	Password change, reset, lockout and deactivation behave as described	B11.5

#	CRITERION	TARGET TO DECLARE SUCCESS	EVIDENCE
15	Measures recorded	Baseline and pilot figures for: days from visit to quotation, average discount, days outstanding, renewals quoted in time, beat plan compliance	B11.8

A8 Issues and escalation

Every Fail and Blocked goes on the issue log the same day.

SEVERITY	MEANING	WHO HANDLES IT	WHEN IT IS LOOKED AT
Blocker	A scenario cannot run, and there is no workaround	ClinexGen delivery engineer; trial lead told at once	The same day
Major	A scenario runs only with a workaround	ClinexGen delivery engineer	At the next daily check-in
Minor	Wording, layout or a cosmetic fault	Logged; fixed in a normal release	At the issue review on days 13–14
Question	Is this how it should work?	ClinexGen trial lead	At the next daily check-in

Escalation path

User → client trial owner → ClinexGen trial lead → ClinexGen support desk (info@clinexgen.com · +91 7338 786 196) → the two sponsors. Response times are agreed at kick-off and written at the top of the issue log; this plan sets no response-time commitment of its own.

A9 Go / no-go and sign-off

Decided at the day-15 meeting from A7 and the issue log.

Go

Every criterion in A7 met, or met with only Minor items open. The proposal's go-live plan starts; configuration and pilot data can carry over if you choose.

Conditional go

Go, with named open items. Each has an owner and a date below, and go-live waits for the items marked as blockers.

No-go

A Blocker without a fix, or a must-have that is In delivery or Roadmap. The reasons are written below, and the trial data is deleted.

OPEN ITEMS FOR A CONDITIONAL GO

ITEM	OWNER	DATE

DECISION AND TRIAL DATA

- ☐ Go
☐ Conditional go
☐ No-go

Trial data: **delete** (ClinexGen confirms the deletion in writing within 30 days) or **carry into go-live** (only if you sign).

Client sponsor

Client trial owner

Date

ClinexGen trial lead

ClinexGen, for the company

Date

B Part B · Functional walkthrough

66 checkpoints in 11 sections, about 9 h 25 min of hands-on time spread over the pilot days. Run them in order; a step that depends on another says so.

Before each section

- Sign in to the right login for the step's chips; keep each person's own browser or phone.
- Put **TRIAL** in the name of every test record you create, so it is easy to find, switch off or delete after the pilot.
- Steps marked **Skip: in delivery** are not run. Steps marked **Optional** are run if time allows.
- Amounts, rates, serials and dates in the steps are test values, never ClinexGen rates or prices.

TEST RECORD	NAME IN THE PILOT	CREATED IN
Products	TRIAL Product A, TRIAL Product B	B4.1
Price list	TRIAL Price List	B4.3
Dealer and its customer	TRIAL Dealer, TRIAL Dealer Clinic	B2.5, B2.6
Customer for the field day	TRIAL Sunrise Clinic, or an approved real customer	B5.1
Serials	TRIAL-A-001, TRIAL-A-002, TRIAL-B-001	B7.1

B1 Sign-in and configuration check

Day 1 · about 45 minutes · 9 checkpoints. Your administrator, with the ClinexGen delivery engineer. Configuration is set by ClinexGen from your lists before day 1; this section checks it.

B1.1 Open the trial workspace over HTTPS

Admin

1. Open the trial workspace address ClinexGen sends you. It starts with `https://`.
2. Sign in with your administrator login (the **Super Admin** role in Beat). Set a new password if Beat asks for one.

EXPECTED

The address bar shows a padlock. The dashboard opens with *Welcome* and your name.

CHECKPOINT Signed in over HTTPS, and the dashboard opens without an error.

☐ Pass
 ☐ Fail
 ☐ Blocked
 ☐ Skip
 Note

B1.2 One wrong password is refused cleanly

Admin

1. Sign out, then enter your user name with a deliberately wrong password, once only. Then sign in correctly.

EXPECTED

Sign-in is refused without saying whether the user name or the password was wrong. Repeated failures lock an account; the lockout test in B11.5 uses a test login, never the administrator.

CHECKPOINT Refused cleanly, without saying which field was wrong.

☐ Pass
 ☐ Fail
 ☐ Blocked
 ☐ Skip
 Note

B1.3 Sidebar and the three dashboard views

Admin

- Count the sidebar: 8 groups and 39 menus (Overview, Field activity, My work, Pipeline, Commercial, Delivery and care, Analysis, Administration).
- Open the dashboard's **My dashboard**, **Team** and **Management** views.

EXPECTED

Every card renders. With no transactions yet, cards show zero or an empty message. You come back here in B11.2.

CHECKPOINT 39 menus in 8 groups, and all three views load.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B1.4 Configuration tabs and company details

Admin

ClinexGen

- Administration** > **Settings** opens **Configuration**. Open each of its 11 tabs.
- In **System settings**, check the company name, address, phone, email, website and tax number. They print on every quotation and invoice.

EXPECTED

Every tab opens. The company details are complete and survive a page reload.

CHECKPOINT Company details complete; every tab opens without an error.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B1.5 Check-in distance and back-dating window

Admin

- In **System settings**, read the check-in distance (the geofence around a customer) and the call-report back-dating window as configured for your workspace. Write both in the note.
- Confirm there is no setting for continuous tracking.

WHY

Beat verifies the visit at the customer, not the rep's whole day. It keeps no location trail and no live map, so less personal data is held.

CHECKPOINT Both values noted, and no continuous tracking setting exists.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B1.6 Branch, territories and team

Admin

- Masters** > **Branches**: the pilot branch is listed and Active.
- Territories**: a parent territory and the pilot territory inside it. **Teams**: the pilot team, with its manager.

EXPECTED

Dispatch, Stock, and Parts and loaners no longer say a branch is missing. Reports roll up the territory hierarchy.

CHECKPOINT Branch, territories and team listed and Active.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B1.7 Document numbering

Admin

1. Open **Numbering**. Check a series exists for customer, call report (DCR), lead, quotation, order, invoice, receipt, delivery challan, employee, partner and expense claim.

EXPECTED

A missing series shows *Documents cannot be numbered until a series exists*. Every format contains {SEQ}.

CHECKPOINT A series exists for every document type above.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B1.8 Expense policy, with test rates

Admin

1. **Expense policy** › mileage rate 1 per kilometre for a two-wheeler, every grade (test value, not a ClinexGen rate or price).
2. Daily allowance 100; a food ceiling of 50 a day, receipt needed above 20 (all test values).

EXPECTED

The warning *No mileage rate is set* goes, and the rates show as Current. Replace the test rates with your approved ones before go-live.

CHECKPOINT Mileage, allowance and ceiling saved and shown as Current.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B1.9 Pipeline stages and the escalation ladder

Admin

ClinexGen

1. **Pipeline**: 13 stages with a win probability each. Quotation and Negotiation need a sent quotation; Order and later need a confirmed order.
2. **Escalation**: a ladder for service calls past their commitment and invoices past their due date. For the pilot, ClinexGen sets one short rung on service calls so B10.3 can see it fire (test value).

EXPECTED

Stages, entry rules and the ladder are as configured. Nothing here needs a release to change.

CHECKPOINT 13 stages with their entry rules, and a test rung on service calls.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B2 People, roles and the dealer

Days 1–2 · about 45 minutes · 6 checkpoints. Your administrator. Use test mobiles and @example.com addresses unless you have approved real ones in writing.

B2.1 Roles and data scopes

Admin

1. **Administration** › **Users and roles** › **Roles and permissions**. Read the 8 roles and their data scope.

EXPECTED

Super Admin (your administrator), Management, Finance and Implementation see All; Sales Manager sees Team; Sales Executive and Channel Partner see Own; Customer Portal signs in to the separate portal. Approving is a separate permission from creating.

CHECKPOINT 8 roles with these scopes.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B2.2 Employees and reporting lines

Admin

1. Administration > Employees > Add employee : the pilot manager and each rep, with branch, territory and team.
2. Set Reports to on each rep to the pilot manager.

EXPECTED

Each employee gets an automatic code. Reports to decides whose records the manager sees.

CHECKPOINT Every pilot employee listed, with the manager as Reports to.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B2.3 Logins, with a forced password change

Admin

Manager

Rep

1. Users > Add user for each employee, linked to the employee record, role Sales Manager or Sales Executive, Must change at first sign-in ticked.
2. Each user signs in once (reps on their phones) and sets a new password.

EXPECTED

A forced password change, then the dashboard. A rep's sidebar has no Users and roles, Employees, Channel partners, Approvals or Audit log.

CHECKPOINT Every pilot user signed in, and each sidebar matches the role.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B2.4 Access boundary

Admin

Rep

1. As administrator, open Users and roles and copy the address from the address bar.
2. Paste it into a rep's browser.

EXPECTED

You do not have access to this, with a Back to dashboard button.

CHECKPOINT The page is blocked for the rep.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B2.5 Dealer firm, and the KYC gate

Admin

1. Administration > Channel partners > Add partner : TRIAL Dealer, a contact, the pilot territory, relationship manager = the pilot manager, agreement dates, commission 5% (test value, not a ClinexGen rate or price).
2. Try to set the status to Active before any document is checked.
3. Upload a harmless sample PDF under Documents, add a review note, then Verify and set Active.
4. Do not run the agreement's electronic signature: it is In delivery (mark it in the note).

EXPECTED

Activation is refused first: Nobody has checked this partner's papers yet. After KYC the panel shows the reviewer and date, and the dealer can be made Active.

CHECKPOINT Activation refused before KYC; Active after it.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B2.6 Dealer login sees only its own

Admin Dealer Rep

1. Add a user linked to TRIAL Dealer with the Channel Partner role. The dealer signs in and changes the password.
2. As the dealer: Field activity > Customers > new customer TRIAL Dealer Clinic, then a phone-call report on it.
3. As a rep, search Customers for it.

EXPECTED

The dealer has no Expenses, Beat plans, Attendance, Leave, Approvals or Administration menus. The customer is attributed to the dealer, and the rep (Own scope) cannot see it.

CHECKPOINT Dealer attribution is right and the rep cannot see the dealer's customer.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B3 Customer import: a masked sample

Day 2 · about 45 minutes · 5 checkpoints. Your administrator and trial owner. Only Customers has an import screen in Beat; at go-live the installed base, open pipeline, products and price lists are loaded by the ClinexGen delivery team, and the counts are reconciled with you.

B3.1 Agree the scope and get the template

Trial owner Admin

1. Agree which customers move for the pilot (the pilot branch's list, masked), the cut-off date, and which employee owns each.
2. Field activity > Customers > Import > Download a template. OrganisationName and an Owner naming an employee are required.

CHECKPOINT Source, cut-off date, row count and count per owner written in the note.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B3.2 Prepare the masked sample

Trial owner

1. Fill the template. Mask contact names, mobiles and emails; keep business names and addresses only if you have approved that in writing.
2. Plant two faults: one row with no owner, and one row repeating TRIAL Dealer Clinic from B2.6. Save as CSV UTF-8.

CHECKPOINT The sample is masked, has the two planted faults, and is saved as CSV UTF-8.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B3.3 Check, fix and import

Admin

1. Choose file > Check file.
2. Give the row with no owner an owner. Leave Accept rows the duplicate check would stop unticked; tick Import the rows that are valid and skip the rest; import.

EXPECTED

First check: both faults listed by row, name and problem, and nothing imported. After the fix: every row but the duplicate imported.

CHECKPOINT Both faults reported before anything is saved; only the duplicate skipped.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B3.4 Reconcile the counts

Admin

Trial owner

1. Search the imported customers. Filter by owner.
2. Open three at random and compare them with the file, field by field.

EXPECTED

The count and the count per owner equal the file.

CHECKPOINT Counts per owner equal the file; three records match field by field. Trial owner initials the note.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B3.5 Merge a duplicate; the same file twice is stopped

Admin

1. Import one deliberate duplicate with the duplicate check overridden, then **Merge duplicates** with a reason.
2. Check the full file again, and close without importing.

EXPECTED

The merged copy stays as an alias of the survivor, with the reason in the audit trail. The second check stops every row already imported.

CHECKPOINT One active record, the copy an alias, and the re-run stopped.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B4 Catalogue and commercial rules

Day 2 · about 30 minutes · 3 checkpoints. Your administrator and stores. Every amount here is a test value chosen for easy arithmetic, not a ClinexGen rate or price.

B4.1 Two products, with floor prices and serial numbers

Admin

1. **Masters** > **Products**: TRIAL Product A: list price 1,000, floor price 800, a tax rate from your masters, warranty 12 months, AMC applicable, needs implementation, **Has serial numbers** on.
2. TRIAL Product B: the same, but warranty 2 months, so its unit reaches the renewal list inside the pilot.

EXPECTED

Both listed as Active. *Quotations cannot price below this.* shows against the floor price.

CHECKPOINT Both products saved with floor price, warranty and serial numbers on.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B4.2 Stock received at the pilot branch

Stores

1. **Delivery and care** > **Stock**: record a receipt of 4 units of each product at the pilot branch.

EXPECTED

A running balance beside a movement ledger. A correction is a new movement with a reason, never an edit.

CHECKPOINT Balance shows 4 of each, with the receipt in the ledger.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B4.3 Price list and discount limit

Admin

1. **Price lists** > new list TRIAL Price List: Product A at 900, floor blank (uses the product's). Set it on TRIAL Sunrise Clinic in B5.1.
2. **Discount authority** > **Add limit**: by role, Sales Executive, maximum 10%, approver Sales Manager (test values).

EXPECTED

Beat picks a price in this order: the customer's own list, then the dealer's list, then the default list, then the list price. Where several limits match, the tightest applies.

CHECKPOINT Price list saved and the limit Active, routed to Sales Manager.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B5 The field day

Days 4–6 · about 90 minutes · 11 checkpoints. Reps on their phones at real customer sites, then the manager. Location permission is on, and each rep has been told in writing that location is taken only at check-in.

B5.1 A customer with coordinates

Rep

1. **Field activity** > **Customers** > **New customer**: TRIAL Sunrise Clinic (or an approved real customer), address in the pilot territory, owner = the rep, one contact.
2. Standing at the customer's site, **Capture from device** for latitude and longitude. Set the customer's price list to TRIAL Price List.

EXPECTED

Customer created; Customer 360 opens with an empty timeline.

CHECKPOINT Customer saved with coordinates captured on the phone.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B5.2 Duplicate customer warning

Rep

1. Start another customer with the same mobile number and try to save. Read the warning, then cancel.

EXPECTED

Beat flags the match by name, mobile, email or tax number before saving.

CHECKPOINT Duplicate flagged before saving.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B5.3 Beat plan, returned and then approved

Rep

Manager

1. **My work** > **Beat plans** > **New plan** for the field days, with calls on the pilot customers. **Submit**.
2. Manager: **Return** with a reason. Rep: add a call, submit again. Manager: **Approve**.

EXPECTED

Draft, Submitted, Returned, Submitted, Approved. Compliance shows the calls as planned, made, missed and unplanned as the days pass.

CHECKPOINT The return and approve cycle works, and compliance figures appear.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B5.4 A physical visit with a geo check-in

Rep

1. At the customer: Field activity > DCR > **Record DCR**, visit mode **Physical visit**; contact met, purpose, summary, requirement, outcome and next action.
2. Add TRIAL Product A, quantity 2; kilometres travelled 12 (test value, not a ClinexGen rate or price).
3. **Save draft**, then **Check in**, **Check out** and **Submit**.

EXPECTED

Submit is held until check-in: *A physical visit needs a geo check-in before it can be submitted.* The check-in records position and distance from the customer: *Verified on site* inside the geofence, *Outside the geo-fence* beyond it. Check-out fills the duration.

CHECKPOINT Check-in records position and distance, and the report is submitted for approval.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B5.5 Phone-call report and the back-dating limit

Rep

1. **Record DCR**, visit mode **Phone call**, same customer. **Submit**.
2. Try a report dated just outside the back-dating window noted in B1.5, then one inside it.

EXPECTED

The phone-call report submits at once; the geo panel reads *Not applicable for this visit mode.* Outside the window is refused; inside is accepted.

CHECKPOINT Submitted without check-in, and the back-dating window is enforced.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B5.6 A call report without signal

Rep

1. On the phone, with Beat installed to the home screen: open **Record DCR**, then switch on airplane mode.
2. Fill a phone-call report and **Save on this device**. Switch airplane mode off and wait a minute.

EXPECTED

Saved on this device. It will be sent when the connection returns. The report then appears in the list. Offline capture covers the call report only.

CHECKPOINT The offline report reaches the list after reconnection, with nothing lost.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B5.7 A call report becomes a lead

Rep

1. Open the phone-call report > **Convert to lead**. Keep the suggested value; set an expected closing date.
2. Now convert the visit report for the same customer and product.

EXPECTED

The lead is created with the report on its timeline. The second conversion warns *An active lead already exists.* Cancel it.

CHECKPOINT Lead created, and the duplicate lead caught.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B5.8 Manager approves one report and rejects another

Manager

Rep

1. **Field activity** > DCR , filter Submitted. Approve one report.
2. Reject another with a reason. The rep corrects it and submits again.

EXPECTED

Approval locks the report: *An approved DCR can no longer be edited.* The rep sees Rejected with the reason and can resubmit. Nobody approves their own report.

CHECKPOINT Approve locks, reject returns with a reason, resubmit works.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B5.9 An expense claim from filed visits

Rep

1. **My work** > Expenses > **New claim** for the field days. **Pull travel** .
2. Add a food line of 70 with a note (test value, not a ClinexGen rate or price). **Submit** .

EXPECTED

Travel is priced from the kilometres on filed reports (12 km at the test rate of 1 = 12). The food line is over the ceiling and is flagged, not refused, so the approver can decide.

CHECKPOINT Travel priced from filed visits, the over-policy line flagged, the claim submitted.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B5.10 Claim approved and reimbursed

Manager

Finance

1. Manager: **My work** > Expenses , filter **Over policy** , read the flagged line, **Approve** .
2. Finance: **Record reimbursement** with a payment reference.

EXPECTED

Submitted, Approved, Paid. The rep cannot approve their own claim.

CHECKPOINT The claim ends Paid, approved by someone other than the rep.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B5.11 Attendance from the field days

Manager

Optional

1. **My work** > Attendance , pick a rep.

EXPECTED

Each field day shows first check-in, last check-out, visits, geo verified and kilometres. Nobody punches in; approved leave and holidays count too.

CHECKPOINT Attendance reflects the field days.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B6 Quotation, approval and order

Days 5–8 · about 60 minutes · 5 checkpoints. Reps, the manager and your administrator. A discount over a rep's limit waits for an approver; a price below the floor price is refused. They are different rules.

B6.1 Quotation from the lead, priced from the price list

Rep

1. Open the lead from B5.7 > **New quotation**. Add TRIAL Product A, quantity 2.

EXPECTED

The unit price fills from TRIAL Price List (900, test value), and tax is worked out from the place of supply.

CHECKPOINT Price from the price list, and tax applied.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B6.2 A discount over the limit waits for an approver

Rep

Manager

1. Set the line discount to 15% (over the 10% test limit) with a reason. Create the quotation and try to send it.
2. Manager: **Commercial** > **Approvals** > **My queue**. Approve with a comment.
3. Rep: send the quotation and open its PDF.

EXPECTED

Sending is held until approval; the request shows Requested 15% against Limit 10%. The rep cannot approve it. After approval it sends, and the PDF carries your company details.

CHECKPOINT The discount is routed, approved by someone else, and the quotation sends.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B6.3 A price below the floor price is refused

Rep

1. On a new line, enter a unit price of 700 (below the 800 floor price, test values).

EXPECTED

Refused outright. No approver can let a price below the floor price through.

CHECKPOINT The floor price is enforced.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B6.4 Customer accepts; order from the quotation

Rep

Finance

1. Mark the quotation accepted by the customer.
2. **Commercial** > **Orders**: create the order from the accepted quotation, with a PO number and date and two payment milestones: 50% on dispatch and 50% on installation (test values). Confirm it.

EXPECTED

The order carries the quotation's lines and prices; nothing is re-keyed. The lead can now move to the Order stage.

CHECKPOINT Order created from the quotation, with two milestones.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B6.5 A dealer-sourced order

Admin

1. On TRIAL Dealer Clinic (B2.6), a user with All scope raises a quotation for TRIAL Product B, quantity 1, and turns it into a confirmed order with one milestone on dispatch.
2. Who does this in your business is agreed at fit and gap.

EXPECTED

The price comes from the dealer's list, then the default list, then the list price. The order is attributed to the dealer.

CHECKPOINT Dealer-sourced order confirmed.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B7 Dispatch and the installed base

Days 8–9 · about 30 minutes · 3 checkpoints. Stores. Serial numbers below are test values.

B7.1 Delivery challan with serial numbers

Stores

1. **Delivery and care** > **Dispatch** : raise a delivery challan against the confirmed order from B6.4.
2. Add the lines with serials TRIAL-A-001 and TRIAL-A-002, the transporter and the vehicle. Do the same for the dealer order (TRIAL-B-001).
3. Above the set consignment value an e-way bill number is asked for: record it only. Filing on the government portal is not part of the pilot.

EXPECTED

A challan can only be raised against a confirmed order, and the serials travel with the line.

CHECKPOINT Both challans raised with serials.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B7.2 Dispatch moves stock and creates installed units

Stores

1. Dispatch both challans and confirm who signed for delivery.
2. Open **Administration** > **Installed base** .

EXPECTED

Stock falls by the units sent, each with a movement. Each serial is now an installed unit at its customer, with warranty dated from delivery (12 months for A, 2 for B).

CHECKPOINT Every dispatched serial is an installed unit, with warranty from delivery.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B7.3 A spare part issued to an engineer

Stores

Service

Optional

1. **Delivery and care** > **Parts and loaners** : issue a spare part to the engineer who will attend B10.2.

EXPECTED

The part shows as out with the engineer until it is closed as used or returned.

CHECKPOINT Part issued and open against the engineer.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B8 Invoice, receipt and TDS

Days 9–11 · about 60 minutes · 6 checkpoints. Finance. Amounts follow from the test prices; the tax deducted at source in B8.3 is a test value.

B8.1 Invoice for the first milestone

Finance

1. **Commercial** > **Invoices** : raise the invoice for the dispatch milestone from the order in B6.4, and issue it.

EXPECTED

A draft does not count as revenue; an issued invoice does. The PDF shows your company details and the tax split.

CHECKPOINT First milestone invoiced and issued.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B8.2 Government e-invoice and payment link

Finance

Skip: in delivery

1. Do not run. Registering a government e-invoice (IRN and signed QR code) and sending an online card or UPI payment link are In delivery.

EXPECTED

Neither is demonstrated, warranted or bid during the pilot.

CHECKPOINT Marked Skip.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B8.3 A receipt with tax deducted at source

Finance

1. **Commercial** > **Payments** : record a receipt for the first invoice: most of it as money received and the rest as tax deducted at source (test value, not a ClinexGen rate or price).
2. Filter receipts waiting for the customer's tax deduction certificate.

EXPECTED

Money received plus tax deducted closes the invoice in full, so TDS does not read as arrears. The receipt is listed as waiting for its certificate until you record it.

CHECKPOINT Invoice closed by receipt plus TDS; certificate pending listed.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B8.4 Second milestone, the collections queue and ageing

Finance

After B9.2

1. After installation (B9.2), invoice the second milestone.
2. **Commercial** > **Collections** : log a promise-to-pay date and the next chase date. Read outstanding by age. Then record the receipt.

EXPECTED

The invoice sits in the collections queue and the ageing bucket until paid, then leaves both.

CHECKPOINT Second milestone invoiced, chased and collected.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B8.5 Recurring billing raises a milestone once

Finance

Optional

1. [Commercial](#) > [Recurring billing](#) on a test order with an unbilled milestone: [Raise now](#), then raise again.

EXPECTED

The first run bills the next unbilled milestone; the second finds nothing left to bill. A duplicate is refused.

CHECKPOINT One invoice raised, no duplicate.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip [Note](#)

B8.6 Dealer commission on money received

Finance

Admin

1. Before any receipt on the dealer order, open [Administration](#) > [Partner commission](#) and bring it up to date.
2. Invoice and receive the dealer order (as B8.1 and B8.3), then bring it up to date again.
3. Raise a statement for TRIAL Dealer for the period; a second person approves it; record the payment.

EXPECTED

Nothing is earned before the receipt. After it, commission is earned on the money received, before tax, at the 5% test rate. Nobody approves their own statement.

CHECKPOINT Commission appears only after money is received, and the statement is approved by someone else.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip [Note](#)

B9 Installation and UAT sign-off

Days 10–11 · about 40 minutes · 3 checkpoints. Your implementation or service team and the customer's signatory.

B9.1 Implementation project from the order

Service

1. [Delivery and care](#) > [Implementation](#) : start a project from the confirmed order; plan dates, a project manager and the activities (installation, training).

EXPECTED

Activities and weighted completion are tracked against the order.

CHECKPOINT Project started from the order, with activities.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip [Note](#)

B9.2 UAT signed by the customer, then go-live

Service

1. Try go-live while an activity is still open.
2. Record a UAT cycle with the customer's signatory, mark it passed and signed off, close every activity, then go-live.

EXPECTED

Go-live is refused until UAT is passed and signed off and every activity is closed. Go-live marks the order delivered.

CHECKPOINT Go-live held until sign-off, then the order shows delivered.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip [Note](#)

B9.3 Close the sale; the contract goes on record

Manager

1. **Commercial** > **Orders** : **Close the sale** on the order from B6.4 (after B8.4).

EXPECTED

Beat checks the order is invoiced, collected, UAT-signed and live, and says what is missing if not. It then names the account manager and creates the annual maintenance contract.

CHECKPOINT Sale closed, account manager named, contract created.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B10 Service, escalation and renewals

Days 11–12 · about 60 minutes · 7 checkpoints. Your service team, the manager and a rep. Renewal lists are raised by Beat; the renewal quotation is raised by a person.

B10.1 A fault reported against the unit

Service

1. **Administration** > **Service** : log a breakdown call against serial TRIAL–A–001 with a priority.

EXPECTED

Response and resolution deadlines follow the priority and run from the customer's report. The cover (warranty, from the delivery date) is frozen onto the call.

CHECKPOINT Call logged against the unit, with cover and deadlines.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B10.2 Engineer visit and parts

Service

1. Assign the engineer, record the visit and the part fitted (from B7.3, if run).

EXPECTED

The visit, the engineer and the part are on the call, with each part marked chargeable or not under the cover.

CHECKPOINT Visit and part recorded on the call.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B10.3 Escalation fires once

Service

Manager

1. Log a second call and leave it past the short test rung set in B1.9.

EXPECTED

The rung is raised once, in the app. When several rungs fall due, only the highest is raised. WhatsApp alerts are In delivery and are not part of the pilot.

CHECKPOINT The rung fires once, and only once.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B10.4 Resolved is not closed

Service

1. The engineer marks the call resolved.
2. The customer's agreement is recorded by a user who holds the close right, and the call is closed.

EXPECTED

Resolving and closing are separate permissions; an engineer-only login cannot close the call. On closure the customer gets one satisfaction question, answered without a login (needs email sending on; otherwise note Skip).

CHECKPOINT Resolved and closed are separate steps.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B10.5 A preventive maintenance round

Service

Optional

1. Plan a preventive round on the contract from B9.3 and complete it.

EXPECTED

The next round is counted from the visit that completed this one, not from the due date.

CHECKPOINT Round completed and the next one dated from it.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B10.6 A contract flagged before expiry

Manager

1. **Delivery and care** > **AMC** : open the contract from B9.3. For the pilot, set its end date **60 days** from today (test value).

EXPECTED

The contract is flagged as expiring, with a renewal reminder.

CHECKPOINT Contract flagged before expiry.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B10.7 The renewal list, quoted by hand

Rep

Manager

1. **Analysis** > **Reports** > **AMC renewal**, and **Administration** > **Installed base** filtered to warranties ending soon.
2. From the list, the rep raises a renewal quotation by hand.

EXPECTED

The contract from B10.6 and the Product B unit (2-month warranty) are on the lists. No quotation is created automatically.

CHECKPOINT Both test units listed, and the renewal quoted by a person.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B11 Reports, access and sign-out

Days 13–14 · about 60 minutes · 8 checkpoints. The manager, your administrator and the trial owner.

B11.1 Geo check-in coverage

Manager

1. [Field activity](#) > DCR , filtered to physical visits by the pilot reps. Read the Geo column.
2. [Analysis](#) > Reports > [Geo check-in coverage](#) by employee, team or territory.

EXPECTED

Each physical visit is Verified on site or Outside the geo-fence. There is no live map; Beat verifies the visit, not the day.

CHECKPOINT Every physical visit shows a geo status, and the report runs.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip [Note](#)

B11.2 Reports and dashboards match the pilot

Manager

Admin

1. Run Daily DCR, Pipeline, Quotation against order, Outstanding, Revenue and collection, AMC renewal, and Partner against employee. Export one.
2. Reopen the dashboard views from B1.3.

EXPECTED

Figures match the records the pilot created. Do not schedule a report by email unless sending has been approved.

CHECKPOINT Report and dashboard counts match the pilot records.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip [Note](#)

B11.3 Data scope by role

Admin

Rep

Manager

Finance

Dealer

1. Open the customer list as a rep, the manager, finance and the dealer.

EXPECTED

The rep sees their own customers, the manager the team's, finance all, and the dealer only what it sourced.

CHECKPOINT Each login sees exactly its scope.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip [Note](#)

B11.4 The audit trail

Admin

1. [Administration](#) > Audit log : filter by record type (call report, quotation, approval request, user, role) and open an update.

EXPECTED

Every pilot action is there with who, when and the values before and after. Entries are append-only and cannot be edited.

CHECKPOINT Every approval in the pilot is traceable to who and when.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip [Note](#)

B11.5 Session security

Admin

Rep

1. A rep changes their password on the phone; their other session ends.
2. The administrator resets a test login's password with a forced change.
3. A test login is locked by repeated wrong passwords, then unlocked by the administrator. A deactivated test user cannot sign in.

EXPECTED

Each behaves as described, and the attempts appear in the audit trail. Never test lockout on the administrator.

CHECKPOINT Password change, reset, lockout, unlock and deactivation all work.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B11.6 Two-factor sign-in for the administrator

Admin

Optional

1. **Settings** > **Security**: set up an authenticator app and turn two-factor on. Store the recovery codes offline first.

EXPECTED

After the password, Beat asks for the authentication code. A recovery code also works, once each.

CHECKPOINT Two-factor on, and sign-in asks for the code.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B11.7 Capabilities in delivery are not tested

Admin

Skip: in delivery

1. Mark Skip for: single sign-on, online card and UPI collection, government e-invoicing, WhatsApp notifications, electronic signature, and inbound email replies.

EXPECTED

None is demonstrated, warranted or bid. If one is a must-have for go-live, say so at the go/no-go meeting.

CHECKPOINT All six marked Skip.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

B11.8 The measures, before and after

Trial owner

ClinexGen

1. From the pilot records, take the five measures in A7 and set them beside the baseline taken on day 4.

EXPECTED

Both columns filled from records, not estimates. ClinexGen promises no figure.

CHECKPOINT Baseline and pilot figures recorded for all five measures.

☐ Pass ☐ Fail ☐ Blocked ☐ Skip Note

LOG Issue log

Copy every Fail and Blocked here the same day. Severity as in A8. The trial owner keeps this page; the ClinexGen trial lead reviews it at each daily check-in.

STEP	RESULT	WHAT HAPPENED	SEVERITY	OWNER AND DATE

Client trial owner

ClinexGen trial lead

Date

Clinexgen Private Limited · info@clinexgen.com · +91 7338 786 196 · www.clinexgen.com. Steps follow Beat's screens and the Beat menu guide; the trial lead confirms any label that has changed. Capability status as at 11 September 2026.