

USER DOCUMENTATION

End User Manual

1. Setting up Twiga CRM

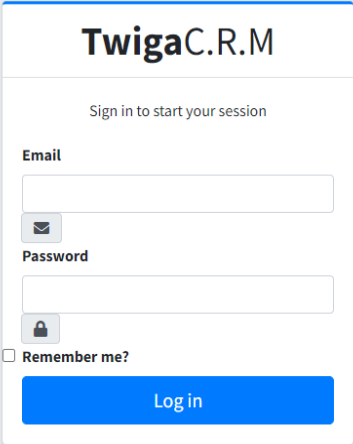
It couldn't be easier to get started with Twiga CRM.

All you need to set up your Twiga CRM is to enter a User Email and password

To set up your Twiga CRM:

1.1 Go to: crm.twigachemicals.com

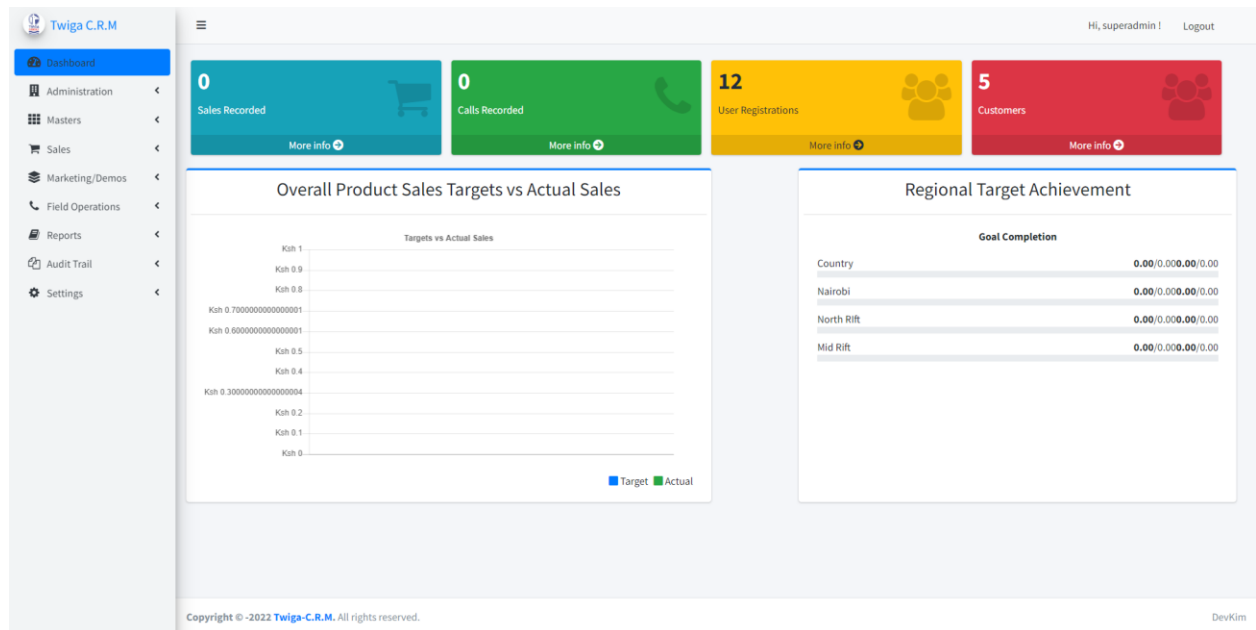
1.2 Enter your Twiga CRM Email and password, then click Log in:



The image shows a login form for TwigaC.R.M. The form is titled "TwigaC.R.M" and has a subtitle "Sign in to start your session". It contains two input fields: "Email" and "Password". The "Email" field has an envelope icon to its left, and the "Password" field has a lock icon to its left. Below the "Password" field is a checkbox labeled "Remember me?". At the bottom of the form is a blue button labeled "Log in".

2. Using the Dashboard

When you sign in to Twiga CRM, the Dashboard is always displayed first and provides a useful overview of CRM data.



The Dashboard provides the following information:

- Info Cards
 - Sales Recorded – the total number of sales movement recorded and submitted by TMs.
 - Calls Recorded – the total number of calls recorded and submitted in the system.
 - User Registrations – the total number of registered users in the System.
 - Customers – the total number of customers in the System.
- Charts
 - Overall Product Sales Targets Vs Actual Sales - the Total Target vs the Actual Sales of the top 10 products for that month.
 - Regional Target Achievement – the percentage of target sales achieved per region.

3. Using the Navigation Bar

The navigation bar lets you move between the different areas of Twiga CRM.

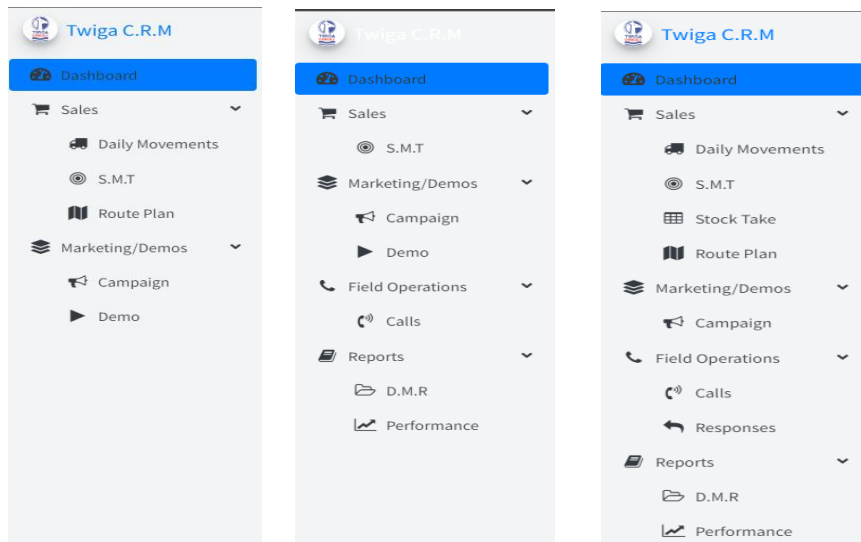


Figure 1: H.R.B Navigation Bar

Figure 2: F.O.A Navigation Bar

Figure 3: T.M / S.S.P Navigation Bar



this is the view details page icon.



this is the view edit page icon.



this is the remove item icon.



this is the approve item icon.



this is the pin location icon.



this is the view pinned location icon.

The toolbar contains links to the following areas:

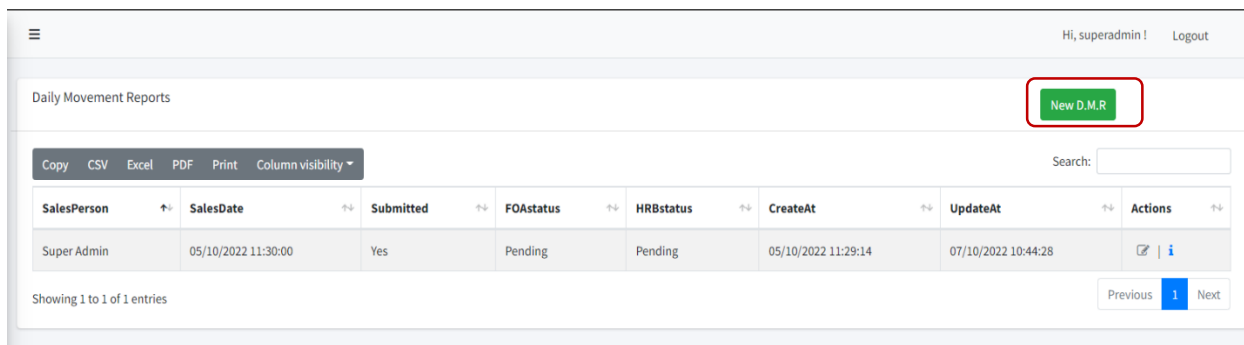
- Dashboard – For An overview of CRM Data.
- Sales -
 - DailyMovement – For recording, viewing and approving the Product Moved on a Daily.
 - S.M.T (Sales Movement Target) – For recording, viewing and approving Sales Target Assigned to T.M(s) and S.S.P(s).
 - Stock Take – For recording, viewing Stocks of Main Distributors.
 - Route Plan – For recording, viewing, approving the Route Plans of T.M(s) and pinning the location visited.
- Marketing/Demos –
 - Campaign – For applying, viewing and approving Marketing Campaigns.
 - Demo – For applying, viewing and approving Demos.
- Field Operations –
 - Calls – For recording, viewing and closing calls .
 - Responses – For viewing responses to questions asked during a call.
- Reports –
 - D.M.R – For viewing and approving submitted Daily Movements .
 - Performance – For generating Monthly and Weekly Performance Reports.



4. Sales

4.1 Daily Movement

This is where T.M(s) and S.S.P(s) will record their product movements of the day.


When you expand Sales on the Navigation bar and click on Daily Movements, the page with all the current user's daily movement reports is displayed.



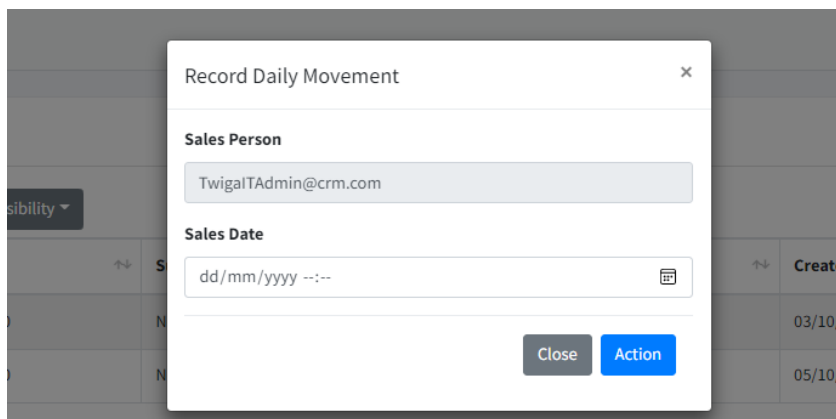
SalesPerson	SalesDate	Submitted	FOAstatus	HRBstatus	CreateAt	UpdateAt	Actions
Super Admin	05/10/2022 11:30:00	Yes	Pending	Pending	05/10/2022 11:29:14	07/10/2022 10:44:28	 

The table contains some information about previously created Daily Movement Reports.

To view more information about these daily movement reports, click the  icon / details icon to show

the daily movement report details page. To edit the daily movement, click the  icon / edit icon to show the daily movement report edit page.

To create a new Daily Movement Report, click on the button **new DMR.**



Record Daily Movement

Sales Person

TwigaITAdmin@crm.com

Sales Date

dd/mm/yyyy --:--

Close

Action

The pop up above will show. There is an input section for the date&time. This is the date&time when the product movement was done.

Click Action to create new DMR and take you to the daily movements report details page.

Hi, superadmin! Logout

Daily Movement Report Details

Sales Person Name: Super Admin F.O.A Approval Status: Pending

ROLE : Default Admin H.R.B Approval Status: Pending

Region: Country

Town: All

Submit D.M.R

Add Daily Movement

Movement

Copy CSV Excel PDF Print Column visibility Search:

Product	Volume	TotalAmount	MainDistributor	Stockist / Farmer	UpdateAt	Action
TwigaMycin (FG100484)	20.00	KSh 59,540.00	John Doe @ John Doe Main	Eric @ Eric Farm	05/10/2022 16:14:38	Edit

Showing 1 to 1 of 1 entries

Previous 1 Next

Back

To add the product moved click the **Add Daily Movement** button, this will display this pop up:

Record Daily Movement

Product

-- Select Products --

Volume

Main Distributor

-- Select Main Distributor --

M.S.F / Corporate

-- Select M.S.F / Corporate --

Close Action

In this page, the **Submit D.M.R** button will submit the Daily Movement Report for approval and processing.

Once submitted the D.M.R cannot be edited via the edit button unless rejected during the approval process.

4.2 S.M.T (Sales Movement Target)

This is where T.M(s) and S.S.P(s) will view Targets assigned to them by F.O.A and approved by H.R.B.

And where the F.O.A will create the Sales Movement Targets for each T.M and S.S.P.

When you expand Sales on the Navigation bar and click on S.M.T, the page with all the sales movement targets is displayed.

Hi, superadmin! Logout

Sales Movement Targets

New S.M.T

Copy CSV Excel PDF Print Column visibility

Search:

FinancialYear	SalesPerson	Month	Submitted	HRBstatus	UpdateAt	Actions
2021 - 2022	Super Admin	OCT	No	Pending	05/10/2022 12:15:59	Edit Info

Showing 1 to 1 of 1 entries

Previous 1 Next

To create a new Sales Movement Target, click on the button **new SMT.**

New Sales Movement Target

Financial Year

-- Select FinancialYears --

Sales Person

-- Select SalesPersons --

Month

-- Select Month --

Close Action

The pop up above will show. Fill the form and click Action to create a new and take you to the sales movement target details page.

Hi, superadmin ! Logout

Sales Movement Target Details

Sales Person Name: Super Admin H.R.B Approval Status: Pending

ROLE : Default Admin

Region & Town: Country - All Submit S.M.T

Financial Year: 2021 - 2022

Month: OCT

Remarks History:

Default Admin : place a new one

Add Remarks

Add Remarks

Targets

Add Target

Copy CSV Excel PDF Print Column visibility Search:

Crop Or Animal	Product	Hectares / Count	Volume	BusinessPotential	Value	MarketShare (%)	UpdateAt	Actions
Dairy Cow	TwigaMycin (FG100484)	1000.00 Dairy Cows	33.33	83.33 L	KSh 99,233.33 L	40.00 %	05/10/2022 16:08:01	Edit Delete

Showing 1 to 1 of 1 entries

Previous 1 Next

Back

To add the targets, click the **Add Target** button, this will display this pop up:

Record Target

Crop / Animal

-- Select Crop / Animal --

Product

-- Select Products --

Land in Ha. / No. Of Animals

Market Share (%)

Close Action

In this page, the **Submit D.M.R** button will submit the Sales Movement Target for approval and processing.

Once submitted the S.M.T cannot be edited via the edit button unless rejected during the approval process.

Once Submitted, Approve S.M.T Area will be displayed only visible by H.R.B as illustrated below:

Hi, superadmin ![Logout](#)

Route Plan Details

Sales Person Name: Super Admin

ROLE : Default Admin

Region: [Country](#)

Town: [All](#)

Start Date: [10/10/2022 11:04:00](#)

F.O.A Approval Status: [Approved](#)

Submit Route Plan

Plan F.O.A Approval Status

Approve

Action

Route

Add Route

CopyCSVExcelPDFPrintColumn visibility

Search:

Day	RouteDate	Zone	Activity	Approved	Location Pinned	Action
Monday	10/10/2022 11:04:00	All Towns	Seek And Find	✓		<div>✓</div> <div></div> <div></div> <div></div>

Showing 1 to 1 of 1 entries

Previous

1

Next

4.3 Stock Take

This is where Product Stocks from Main Distributor site will be recorded.

When you expand Sales on the Navigation bar and click on Stock Take, the page with all the stock records is displayed.

Stock Take

Hi, superadmin! Logout

New Stock Record

Copy CSV Excel PDF Print Column visibility

Search:

RetailAccountManager	Product	Quantity	MainDistributor	StockTakeDate	UpdateAt	Actions
Super Admin	TwigaMycin 0.25 L (FG100484)	150.00	Jane Doe - Jane Doe	04/10/2022 13:03:00	05/10/2022 13:07:47	

Showing 1 to 1 of 1 entries

Previous 1 Next

To create a new Daily Movement Report, click on the button **new Stock Record**.

Record Stock

RetailAccountManagerId

superadmin@twigacrm.com

Product

-- Select Products --

Quantity

Main Distributor

-- Select Main Distributor --

StockTakeDate

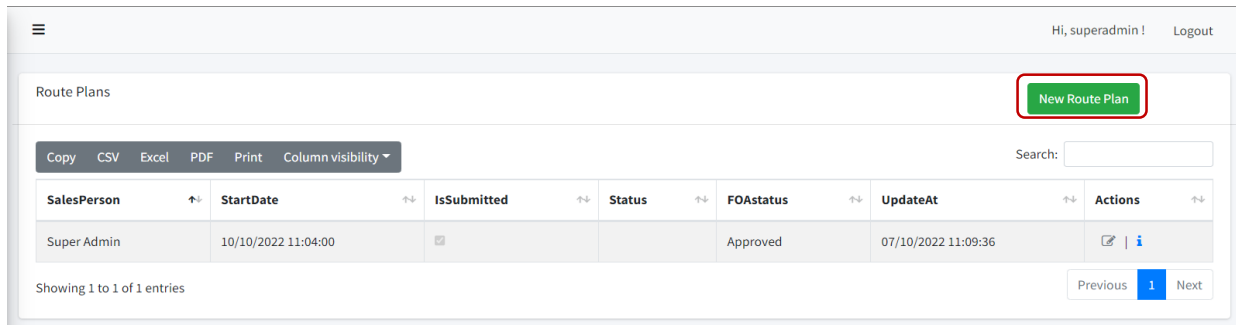
dd/mm/yyyy --:--

Close Action

4.4 Route Plan

When you expand Sales on the Navigation bar and click on Route Plan, the page all route plans is displayed.

This is where T.M(s) and S.S.P(s) set their Route Plans and the F.O.A approves the route plans.



Route Plans

Hi, superadmin ! Logout

[New Route Plan](#)

Copy CSV Excel PDF Print Column visibility

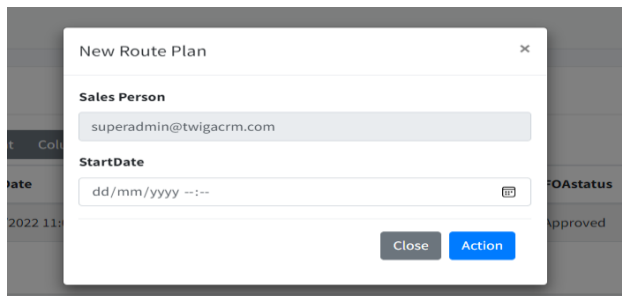
Search:

SalesPerson	StartDate	IsSubmitted	Status	FOAstatus	UpdateAt	Actions
Super Admin	10/10/2022 11:04:00	<input checked="" type="checkbox"/>		Approved	07/10/2022 11:09:36	Edit Info

Showing 1 to 1 of 1 entries

Previous **1** Next

To create a new Route Plan, click on the button **new Route Plan.**



New Route Plan

Sales Person

superadmin@twigacrm.com

StartDate

dd/mm/yyyy --:--

Close Action

The pop up above will show. Fill the form and click Action to create a new and take you to the Route Plan details page.

Hi, superadmin! Logout

Route Plan Details

Sales Person Name: Super Admin **F.O.A Approval Status:** Pending

ROLE : Default Admin

Region: Country **Submit Route Plan**

Town: All

Start Date: 26/09/2022 11:19:00

Route **Add Route**

Copy CSV Excel PDF Print Column visibility Search:

Day	RouteDate	Zone	Activity	Approved	Location Pinned	Action
No data available in table						

Showing 0 to 0 of 0 entries Previous Next

Back

To add the targets, click the **Add Route** button, this will display this pop up:

Add Route

Plan Start Date
26/09/2022 11:19:00

Day
Monday

RouteDate
26/09/2022 11:19:00

Zone
-- Select Zone --

Activity

Close Action

In this page, the **Submit Route Plan** button will submit the Route Plan for approval and processing.

Once submitted, the Route Plan cannot be edited via the edit button unless rejected during the approval process.

Once Submitted, Approve Route Plan Area will be displayed only visible by F.O.A as illustrated below:

Hi, superadmin ![Logout](#)

Route Plan Details

Sales Person Name: Super Admin

ROLE : Default Admin

Region: [Country](#)

Town: [All](#)

Start Date: [10/10/2022 11:04:00](#)

F.O.A Approval Status: [Approved](#)

Submit Route Plan

Plan F.O.A Approval Status [Approve](#)

Action

Route

Add Route

CopyCSVExcelPDFPrintColumn visibility

Search:

Day	RouteDate	Zone	Activity	Approved	Location Pinned	Action
Monday	10/10/2022 11:04:00	All Towns	Seek And Find	✓		✓

Showing 1 to 1 of 1 entries

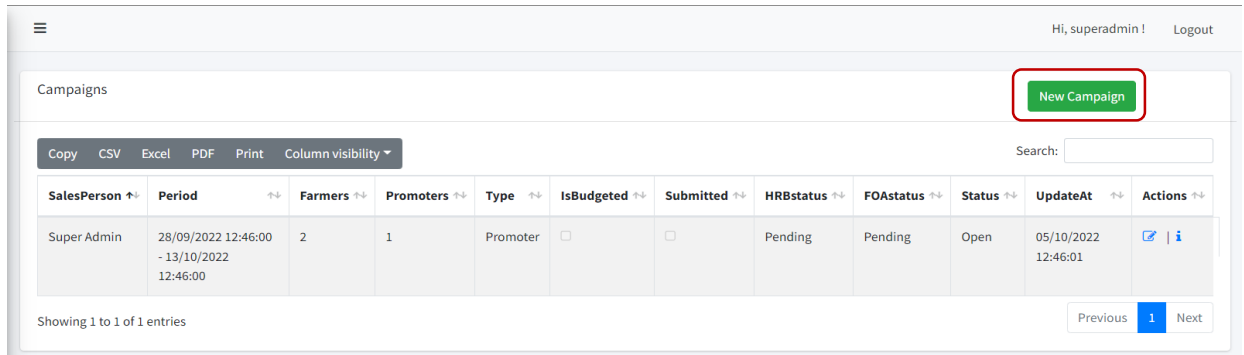
Previous1Next

5. Marketing/Demos

5.1 Campaign

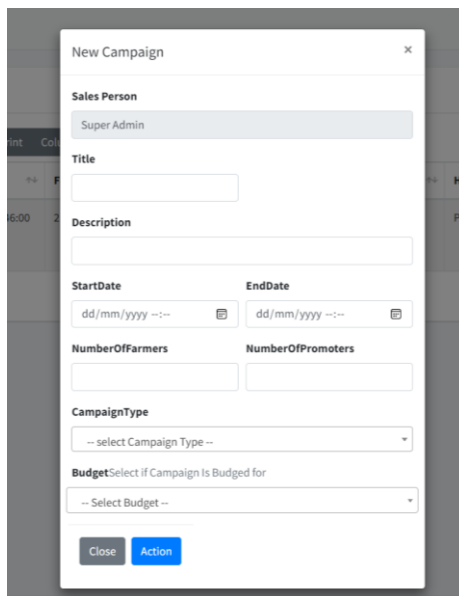
This is where T.M(s) and S.S.P(s) will view and request for Campaign.

When you expand Marketing/Demos on the Navigation bar and click on Campaign, the page with all the campaigns is displayed.



SalesPerson	Period	Farmers	Promoters	Type	IsBudgeted	Submitted	HRBstatus	FOAstatus	Status	UpdateAt	Actions
Super Admin	28/09/2022 12:46:00 - 13/10/2022 12:46:00	2	1	Promoter	<input type="checkbox"/>	<input type="checkbox"/>	Pending	Pending	Open	05/10/2022 12:46:01	✎ i

To create a new Campaign, click on the button **new Campaign.**



New Campaign

Sales Person

Super Admin

Title

Description

StartDate

dd/mm/yyyy --:--

EndDate

dd/mm/yyyy --:--

NumberOfFarmers

NumberOfPromoters

CampaignType

-- select Campaign Type --

Budget

Select if Campaign Is Budged for

-- Select Budget --

Close

Action

The pop up above will show. Fill the form and click Action to create a new and take you to the campaign details page.

Campaign Details

Sales Person Name: Super Admin

Campaign Title: My Market Activation

Year & Region: All Country

Budget: 1000000

Campaign Type: Promoter

Number of Farmers: 1

Number of Promoters: 1

Remarks History:

Add Remarks

Campaign Products

Product	CurrentMovement	CurrentMovementValue	ProjectedMovement	ProjectedMovementValue	Approved	ImportantObservation	Actions
No data available in table							

Showing 0 to 0 of 0 entries

Campaign Items

CampaignItem	RequestedQuantity	RequestedPrice	Approved Quantity	Approved Price	Approved	Actions
No data available in table						

Showing 0 to 0 of 0 entries

Campaign Expenses

ExpenseCategory	RequestedAmount	ApprovedAmount	Approved	Actions
No data available in table				

Showing 0 to 0 of 0 entries

Campaign Products

Add Product

Product	CurrentMovement	CurrentMovementValue	ProjectedMovement	ProjectedMovementValue	Approved	ImportantObservation
No data available in table						

Showing 0 to 0 of 0 entries

Campaign Items

Add Item

CampaignItem	RequestedQuantity	RequestedPrice	Approved Quantity	Approved Price	Approved	Actions
No data available in table						

Showing 0 to 0 of 0 entries

Campaign Expenses

Add Expense

ExpenseCategory	RequestedAmount	ApprovedAmount	Approved	Actions
No data available in table				

Showing 0 to 0 of 0 entries

To add products requested for campaign click the **Add Product** button, this will display a pop up with a form to add product, current movement and projected Movement.

To add Items requested for campaign click the **Add Item** button, this will display a pop up with a form to add item and requested quantity of the item.

To add Expenses requested for campaign click the **Add Expense** button, this will display a pop up with a form to add Expense Category and Requested Amount.

Hi, superadmin ! Logout

Campaign Details

Sales Person Name: Super Admin **F.O.A Approval Status:** Pending

Campaign Title: My Market Activation **H.R.B Approval Status:** Pending

[A new Campaign](#) **Campaign Status:** Open

ROLE : Default Admin

Town & Region: All - Country

Budget:

Campaign Type: Promoter **Submit Campaign**

Number Of Farmers: 2

Number Of Promoters: 1

Remarks History:

Add Remarks

Add Remarks

In this page, the **Submit Campaign** button will submit the Campaign for approval and processing.

Once submitted the Campaign Details cannot be edited via the edit button unless rejected during the approval process.

Once Submitted, Each Item, Product and Expense have to be approved before approving the whole campaign. The individual approval will look something like this:

Showing 0 to 0 of 0 entries Previous Next

Campaign Expenses **Add Expense**

Search:

ExpenseCategory	RequestedAmount	ApprovedAmount	Approved	Actions
Food	KSh 2,000.00	KSh 0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Showing 1 to 1 of 1 entries Previous 1 Next

Once Submitted, Approve Campaign Area will be displayed only visible by F.O.A and H.R.B as illustrated below:

Campaign Details

Sales Person Name: Super Admin

Campaign Title: My Market Activation

ROLE : Default Admin

Town & Region: All - Country

Budget:

Campaign Type: Promoter

Number Of Farmers: 2

Number Of Promoters: 1

F.O.A Approval Status: Pending

H.R.B Approval Status: Pending

Campaign Status: Open

Submit S.M.T

Campaign F.O.A Approval Status: -- select Status --

Action

Remarks History:

Approval of Expense and Campaign Items will require filling the form provided with approved values as illustrated below:

Hi, superadmin

Approve Requested Expense

Campaign Title: My Market Activation

Budget Balance: 0.00

A new Campaign

TYPE : Promoter

Budget: Initial Budget: 2022 - 2023 KSh 1,500,000.00

Expense: Food

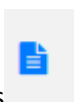
RequestedAmount: 2000.00

ApprovedAmount: 0.00

Approve

Back to Campaign Details

Before the Campaign can be closed, the T.M/S.S.P must fill the report to show the actual movement after the campaign, important observations and follow up actions.



To do this find this icon on the row of requested products and fill the form accordingly.

To close the Demo, the T.M / S.S.P must have indicated the Actual Movement After the Campaign, the important observation and the follow up action to show the close Campaign area as illustrated below:

The screenshot shows a web interface for managing campaigns. At the top right, there is a 'Campaign Status' dropdown menu with the text '-- select Status --' and a downward arrow. Below this dropdown is a blue button labeled 'Action'. This entire section is enclosed in a red rectangular box. Below the 'Action' button is a 'Remarks History' section with a large text area and a small 'Add Remarks' button. At the bottom, there is a 'Campaign Products' section with an 'Add Product' button and a search bar.

Once the Campaign has been close, the Campaign Print Out can be generated and printed using the button highlighted below:

The screenshot shows a 'Campaign Details' page. At the top right, there is a green button labeled 'Generate Print Out' highlighted by a red rectangular box. Below this button, there are several status fields: 'F.O.A Approval Status: Approved', 'H.R.B Approval Status: Approved', and 'Campaign Status: Closed'. Below these fields is a 'Campaign Status' dropdown menu with the text 'Close' and a downward arrow. Below this dropdown is a blue button labeled 'Action'. Below the 'Action' button is a 'Remarks History' section with a large text area.

5.2 Demo

This is where T.M(s) and S.S.P(s) will view and request for Campaign.

When you expand Marketing/Demos on the Navigation bar and click on Demo, the page with all the demos is displayed.

Hi, superadmin! Logout

Demos

New Demo

Copy CSV Excel PDF Print Column visibility

Search:

Title	Description	StartDate	EndDate	SalesPerson	DemoType	IsSubmitted	FOAstatus	PDstatus	Status	UpdateAt	Actions
Free Demo	Some Kind Of Demo	28/09/2022 11:49:00	19/10/2022 11:49:00	Super Admin	Result & Method	<input type="checkbox"/>	Pending	Pending	Open	06/10/2022 11:48:24	Edit Info

Showing 1 to 1 of 1 entries

Previous 1 Next

To create a new Demo, click on the button **new Demo.**

New Demo

Sales Person

Super Admin

Title

Description

StartDate

dd/mm/yyyy --:--

EndDate

dd/mm/yyyy --:--

DemoType

-- select Demo Type --

Close Action

The pop up above will show. Fill the form and click Action to create a new and take you to the campaign details page.

Hi, superadmin!
Logout

Demo Details

Sales Person Name: Super Admin
Demo Title: Free Demo
[Some Kind Of Demo](#)
ROLE : Default Admin
Demo Type: [Result & Method](#)

F.O.A Approval Status: [Pending](#)
P.D Approval Status: [Pending](#)
Demo Status: [Open](#)

Remarks History:

Add Remarks

Demo Details

Copy CSV Excel PDF Print Column visibility
Search:

DemoDetail No.	Demo	Crop / Animal	Target Pest / Disease	Req Land in Ha. / No. Of Animals	Req No. Of Demos	App Land in Ha. / No. Of Animals	App No. Of Demos	Product	Competing Product	Comment	Requested Volume	Approved Volume	Approval	Actions
2	Free Demo	Dairy Cow	Fall Army Worm	5.00	3.00	0.00	0.00	TwigaMycin 0.25 L (FG100484)	Something From Syngenta	nothing	1.25 L	0.00 L		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Showing 1 to 1 of 1 entries
1

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DevKin

The figure above is a zoomed out image of the demo details page.

Demo Details

Add

CopyCSVExcelPDFPrintColumn visibility


Search:

DemoDetail No.	Demo	Crop / Animal	Target Pest / Disease	Req Land in Ha. / No. Of Animals	Req No. Of Demos	App Land in Ha. / No. Of Animals	App No. Of Demos	Product	Competing Product	Comment	Requested Volume	Approved Volume	Approval
2	Free Demo	Dairy Cow	Fall Army Worm	5.00	3.00	0.00	0.00	TwigaMycin 0.25 L (FG100484)	Something From Syngenta	nothing	1.25 L	0.00 L	

Showing 1 to 1 of 1 entries

Previous1Next

Back

The figure above show the table has some collapsed columns, by clicking the  icon the columns can be made visible as shown below:

Demo Details

Add

CopyCSVExcelPDFPrintColumn visibility

Search:

DemoDetail No.	Demo	Crop / Animal	Target Pest / Disease	Req Land in Ha. / No. Of Animals	Req No. Of Demos	App Land in Ha. / No. Of Animals	App No. Of Demos	Product	Competing Product	Comment	Requested Volume	Approved Volume	Approval
1	Free Demo	Dairy Cow	Fall Army Worm	5.00	3.00	0.00	0.00	TwigaMycin 0.25 L (FG100484)	Something From Syngenta	nothing	1.25 L	0.00 L	

Actions

Showing 1 to 1 of 1 entries

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Back

To add demo details for the Demo, click the **Add** button, this will display a pop up below.

Add Details

Crop / Anima

-- Select Crop / Animal --

Target Pest / Disease

-- Select PestAndDisease --

Land in Ha. / No. Of Animals

No. Of Demos

Product

-- Select Product --

Competing Product

-- Select Competing Product --

Comments

Close

Action

In this page, the **Submit Campaign** button will submit the Campaign for approval and processing.

Once submitted the Campaign Details cannot be edited via the edit button unless rejected during the approval process.

Hi, su

Demo Details

Sales Person Name: Super Admin

F.O.A Approval Status: Pending

Demo Title: Free Demo

P.D Approval Status: Pending

Some Kind Of Demo

Demo Status: Open

ROLE : Default Admin

Demo Type: Result & Method

Submit Demo

Remarks History:

Once Submitted, Each Detail has to be approved before approving the whole demo. The individual approval will look something like this:

Demo Details														Add	
Copy CSV Excel PDF Print Column visibility														Search:	
DemoDetail No.	Demo	Crop / Animal	Target Pest / Disease	Req Land in Ha. / No. Of Animals	Req No. Of Demos	App Land in Ha. / No. Of Animals	App No. Of Demos	Product	Competing Product	Comment	Requested Volume	Approved Volume	Approval		
2	Free Demo	Dairy Cow	Fall Army Worm	5.00	3.00	0.00	0.00	TwigaMycin 0.25 L (FG100484)	Something From Syngenta	nothing	1.25 L	0.00 L			
Actions															
Showing 1 to 1 of 1 entries														Previous 1 Next	
														Back	

Once Submitted, Approve Demo Area will be displayed only visible by F.O.A and P.D as illustrated below:

HI, superadmin ! Logout

Demo Details

Sales Person Name: Super Admin

Demo Title: Free Demo

Some Kind Of Demo

ROLE : Default Admin

Demo Type: Result & Method

F.O.A Approval Status: Pending

P.D Approval Status: Pending

Demo Status: Open

Submit Demo Request

Demo F.O.A Approval Status

-- select Status --

Action

Remarks History:

Approval of Demo details will require filling the form provided with approved values as illustrated below:

Crop / Anima

Dairy Cow

Target Pest / Disease

Fall Army Worm

Product

TwigaMycin 0.25 L (FG100484)

Competing Product

Something From Syngenta - Syngenta

Suggested Land in Ha. / No. Of Animals

5.00

Suggested No. Of Demos

3.00

Save

Approved Land in Ha. / No. Of Animals

0.00

Approved No. Of Demos

0.00

To close the Demo, the T.M / S.S.P must have submitted their final report to show the close Demo area as illustrated below:

Demo Status

-- select Status --

Action

Remarks History:

Add Remarks

Add Remarks

Demo Details

Add

Copy CSV Excel PDF Print Column visibility

Search:

DemoDetail No.	Demo	Crop / Animal	Target Pest / Disease	Req Land in Ha. / No. Of Animals	Req No. Of Demos	App Land in Ha. / No. Of Animals	App No. Of Demos	Product	Competing Product	Comment	Requested Volume	Approved Volume	Approval	Actions
----------------	------	---------------	-----------------------	----------------------------------	------------------	----------------------------------	------------------	---------	-------------------	---------	------------------	-----------------	----------	---------

Once the Demo has been close, the Demo Print Out can be generated and printed using the button highlighted below:

HI, superadmin ! Logout

Demo Details

Generate Print Out

Sales Person Name: Super Admin

Demo Title: adsgasdfa

fasdfsda

ROLE : Default Admin

Demo Type: Result & Method

F.O.A Approval Status: Approved

P.D Approval Status: Approved

Demo Status: Closed

Demo Status

Close

Action

6. Field Operations

6.1 Calls

This is where Calls are recorded in the System.

When you expand Field Operations on the Navigation bar and click on Calls, the page with all the calls is displayed.

Hi, superadmin! Logout

Calls

New Call

Copy CSV Excel PDF Print Column visibility Search:

SpokenTo	CallTime	CallType	Is Contact A Customer	Customer	MobileNumber	ContactCategory	ContactType	Contact Name	Town	Subject	Remarks	ForwardedTold	Status	Actions
Super Admin	05/10/2022 13:16:00	tm to fca	True	Eric	0115417794	Farmer	M.S.F	Eric	Kinangop	Something	Explaining the Thing		Open	Edit Delete

Showing 1 to 1 of 1 entries

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To create a new Demo, click on the button **new Demo.**

New Call

Spoken To: Super Admin

CallTime: dd/mm/yyyy --:--

Call Type: -- Select Call Type --

Is Customer: ☐

Customer: -- Select Customer --

MobileNumber:

ContactCategory: -- select Contact Category --

ContactType: -- select Contact Type --

NonCustomerContactName:

Town: -- Select Town --

Subject:

Remarks:

Close Action

The pop up above will show. Fill the form and click Action to create a new and take you to the campaign details page.

If The Contact Person is a registered customer in the C.R.M, please check the box highlighted.

Below is call details page:

The screenshot shows a web interface titled "Call Details". At the top right, it says "Hi, superadmin ! Logout". The main content area has a header "Call Details". Below this, there's a section with call information: "Call: tm to foa", "Something", "Call Time: 05/10/2022 13:16:00", and "Contact Person : Eric". To the right of this, it says "Call Status: Open". Below the call information, there's a "Questionnaire" section. The first question is "1 .) How do you rate our services". It has two radio buttons: "very Good" (selected) and "Very Bad". Below the radio buttons, it says "Recorded Answer: very Good". To the right of the "Recorded Answer" field, there is a blue "Action" button. Red boxes highlight the "Recorded Answer" field and the "Action" button.

Here, the questionnaire will be displayed based on the call type selected during recording the new call.

The **Recorded Answer** area shows the previous answer provided for the same call.

Click the **Action** button to save each questions answer.

To close a Call, the below area will be displayed for user with close call permissions:

The screenshot shows the same "Call Details" page as before. However, the "Call Status" dropdown menu is now visible, showing "-- select Status --". Below the dropdown menu, there is a blue "Action" button. Red boxes highlight the "Call Status" dropdown menu and the "Action" button.

6.2 Responses

This is where we can view responses questionnaires filled during calls.

When you expand Field Operations on the Navigation bar and click on Responses, the page with all the responses is displayed.

Hi, superadmin ![Logout](#)

Questions

Copy CSV Excel PDF Print Column visibility

Search:

Spoke To	Question	Answer	UpdateAt	Actions
Super Admin	How do you rate our services	very Good	05/10/2022 13:15:43	i

Showing 1 to 1 of 1 entries

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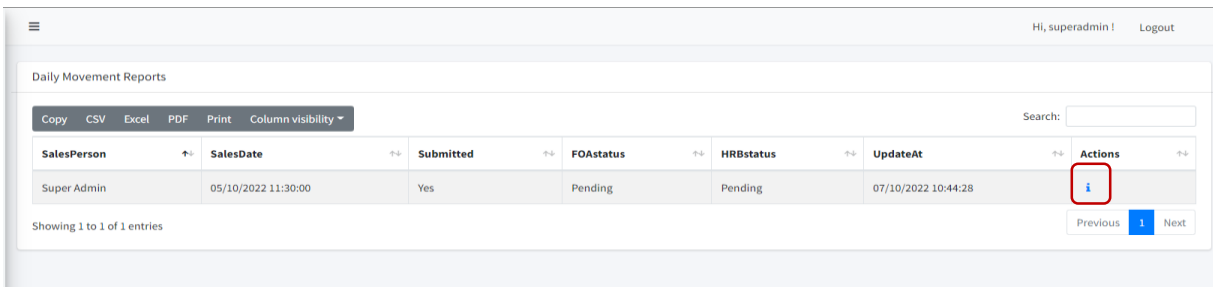
The highlighted button will take us to the specific call details that the response was provided at.

7. Reports

7.1 D.M.R


This is where Submitted Daily Movement Reports can be viewed and approved.

When you expand Reports on the Navigation bar and click on D.M.R, the page with all the submitted daily movement reports is displayed.



Daily Movement Reports

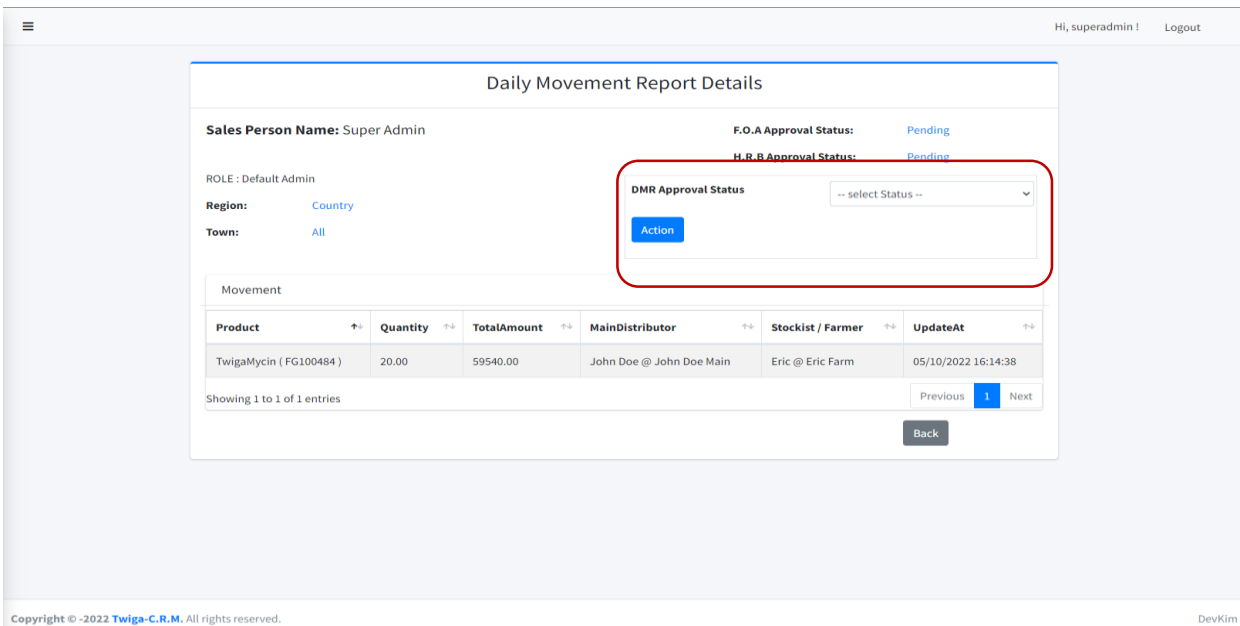
Copy CSV Excel PDF Print Column visibility Search:

SalesPerson	SalesDate	Submitted	FOAstatus	HRBstatus	UpdateAt	Actions
Super Admin	05/10/2022 11:30:00	Yes	Pending	Pending	07/10/2022 10:44:28	

Showing 1 to 1 of 1 entries

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Clicking on the  icon will take us to the Daily Movement Report Details Page shown below:



Daily Movement Report Details

Sales Person Name: Super Admin

ROLE : Default Admin

Region: Country

Town: All

F.O.A Approval Status: Pending

H.R.B Approval Status: Pending

DMR Approval Status: -- select Status --

Action

Movement

Product	Quantity	TotalAmount	MainDistributor	Stockist / Farmer	UpdateAt
TwigaMycin (FG100484)	20.00	59540.00	John Doe @ John Doe Main	Eric @ Eric Farm	05/10/2022 16:14:38

Showing 1 to 1 of 1 entries

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Back

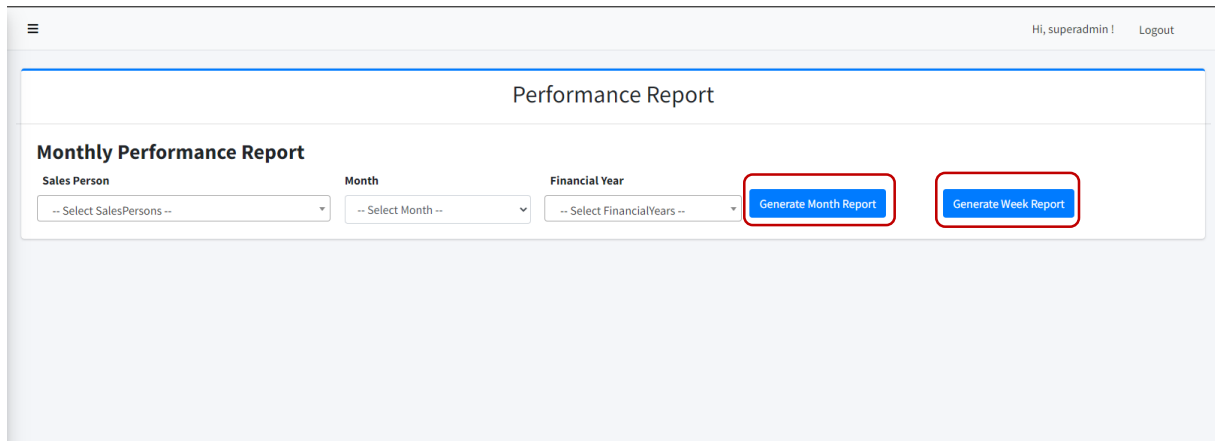
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The area highlighted above is the D.M.R approval area, used to approve the D.M.R.

7.2 Performance

This is where Monthly and Weekly Performance Reports are generated.

When you expand Reports on the Navigation bar and click on Performance, the page with a form is displayed.

A screenshot of a web application interface for generating performance reports. The page has a header with a hamburger menu icon on the left and user information 'Hi, superadmin !' and a 'Logout' link on the right. The main content area is titled 'Performance Report'. Below this title, there is a section labeled 'Monthly Performance Report'. This section contains three dropdown menus: 'Sales Person' with the placeholder '-- Select SalesPersons --', 'Month' with the placeholder '-- Select Month --', and 'Financial Year' with the placeholder '-- Select FinancialYears --'. To the right of these dropdowns are two blue buttons with white text: 'Generate Month Report' and 'Generate Week Report'. Both buttons are highlighted with a red rectangular border.

To generate a monthly performance report, fill the form and click the first highlighted button **Generate Month Report.**

To generate a weekly performance report, fill the form and click the second highlighted button **Generate Week Report.**