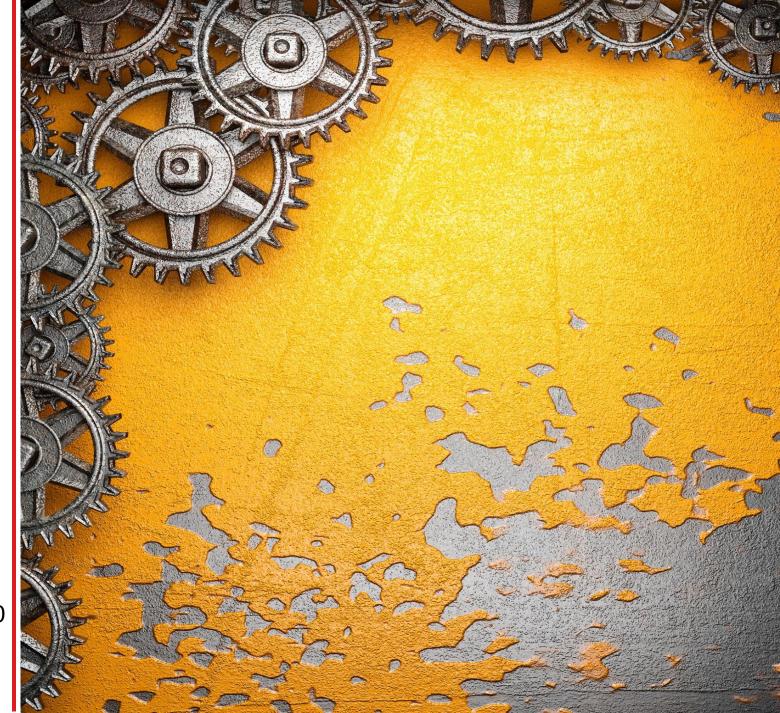
PIPELINE MANAGER

From Amshuhu iTech Solutions Pvt. Ltd.

DSM Training Pack

Version 1.0



DSM Activities

- Initial Set Up
- Basic Activities
- Annual Activities
- Monthly Activities
- Opportunity Management
- Reports Viewing

Initial Set Up

- Initial super user account will be created by Amshuhu Support Team.
- Super user (DGM / DSM) will receive the welcome mail with login details.
- Super user (DGM / DSM) can login using web tool (https://shell.isteer.co)
- Icons and its function
 - To Add New



• To Filter



• To Edit



To Change Status



Active Status

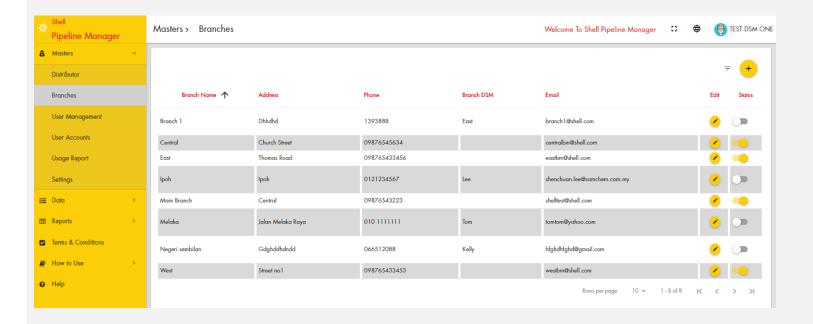


Inactive Status



Basic Activities

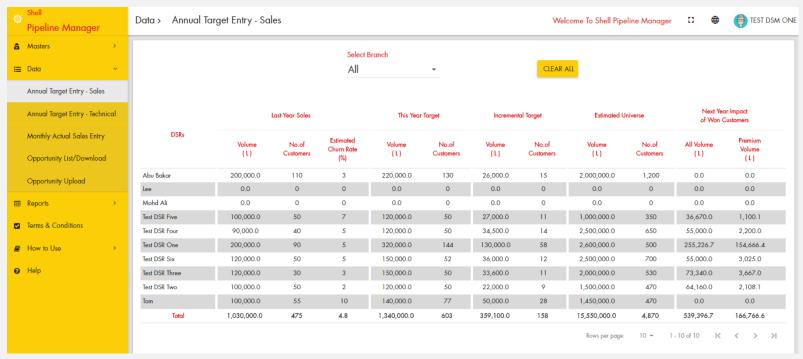
- Create and Manage Branches
- Create and Manage Users



- Menu for both Branches and User Management are under Masters.
- Click on User
 Management to
 view , add, modify
 and delete user.
- User Account will show total users available for your company in different category.
- Usage Report to view usage by all users

Annual Activities

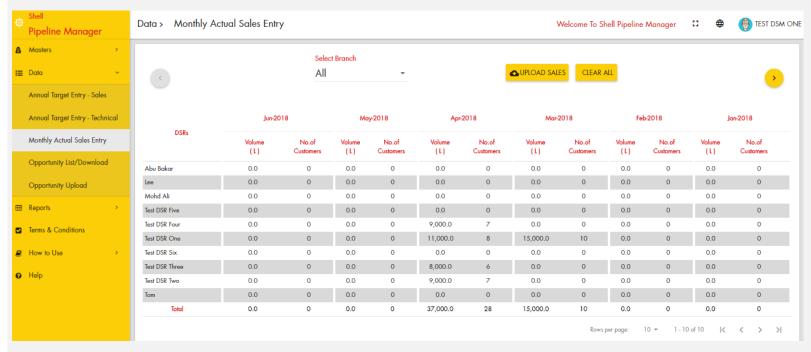
- Update Annual Target for all DSRs (Sales)
- Update Annual Target for DFLTS (Technical)



- Click on the numbers to update last year sales and expected churn rate against each DSR / DFLTS.
- Update current year target. System will calculate incremental target.
- Next year impact on this year WON customer is only for your indication.
- You need to update only after 1st Jan of every year.
- You can revise target during middle of the year.

Monthly Activities

Update monthly sales data all DSRs (Sales)



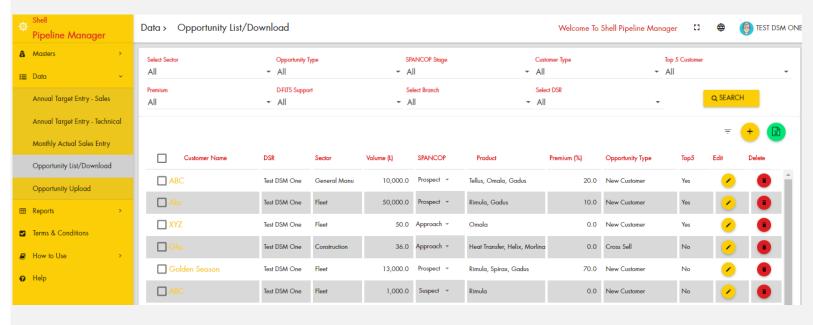
Notes

- Click on the numbers to update monthly sales.
- You can download in excel and upload also. But we prefer online update to avoid any mismatch. It will take only 5 minutes to update it online.
- System will generate automated OWL / CPT csv files, which you submit every month to shell based on this data. Correct data updates will simplify your work.

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Opportunity Management

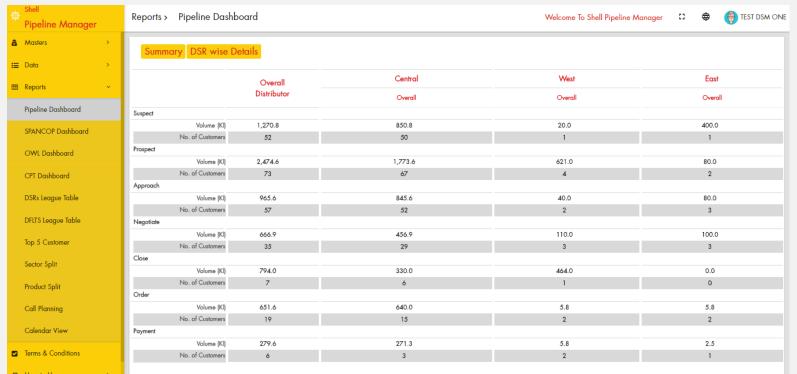
- View Opportunities Created by DSRs
- Update an Opportunity
- Add an opportunity to DSR



- You could search and filter and view opportunity.
- You can reassign opportunity.
- Download opportunity into excel.
- You can upload opportunity using "Opportunity Upload" menu link. Sample excel file available in that screen

Report Viewing

- View Reports like Pipeline, SPANCOP, Top 5 Customers and Call Planning
- Aggregated Reports like OWL, CPT, Product Split and Sector Splits
- Comparative Reports like DSR and DFLTS League Table
- Calendar view to review Monthly, Daily call plans / POPSA of all DSRs



- You can view by overall or DSR wise.
- You can assign different color code for each DSR which will be displayed in calendar view. Color can be assigned in user edit in user management.
- In calendar view each day has a rectangle with number which day total visit, click on those numbers to view details. Number in legend will show monthly visit numbers of each DSR.