

PIPELINE MANAGER

From Amshuhu iTech Solutions
Pvt. Ltd.

DFLTS Training Pack

Version 1.0



DFLTS Activities

- Initial Set Up
- Create an Opportunity
- DFLTS Review
- Reports for DFLTS
- Notification
- Marketing Material

Initial Set Up

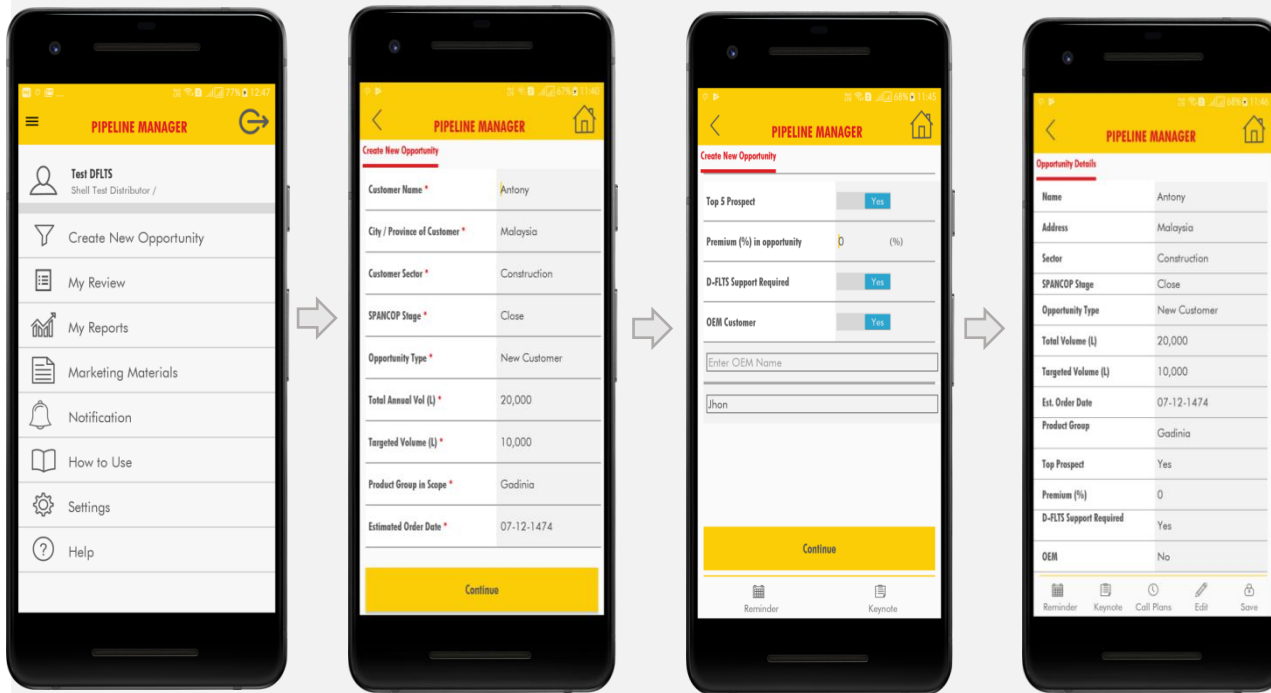
- DGM / DSM will create a DFLTS user account using the web tool (<https://shell.isteer.co>)
- DFLTS will receive a welcome email with user name (email id) and password
- DFLTS downloads Pipeline Manager App from App Store or Play store



- DFLTS uses the received user name and password to login into the account

Opportunity Management

- Creating New Opportunities for DSR



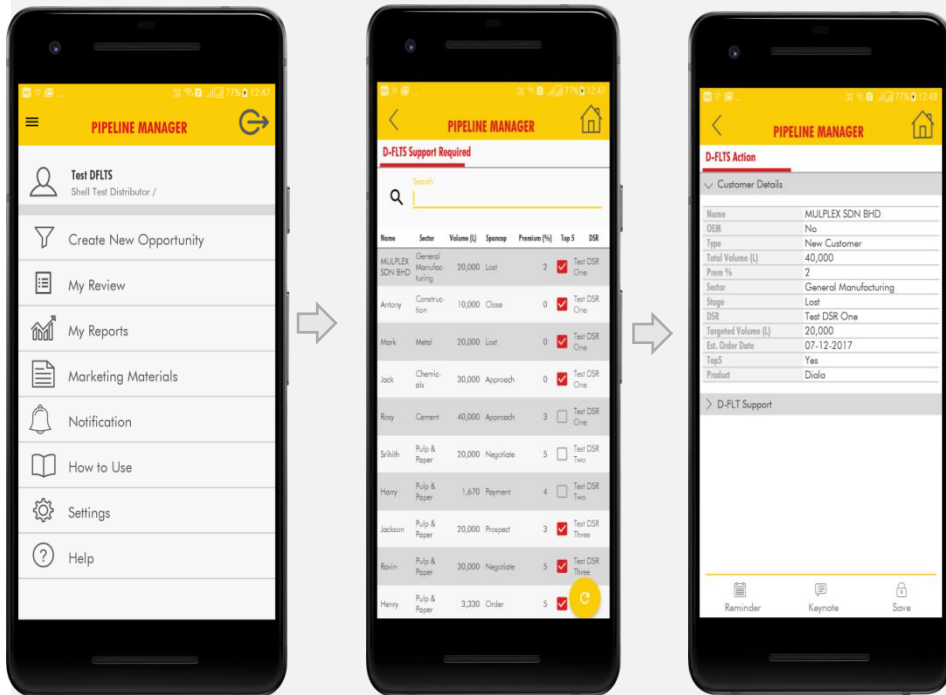
Notes

- Click on opportunity Name to view full details and click edit in bottom menu

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DFLTS Review

- Review opportunity assigned to DFLTS



Notes

- Update technical support activities to opportunity.

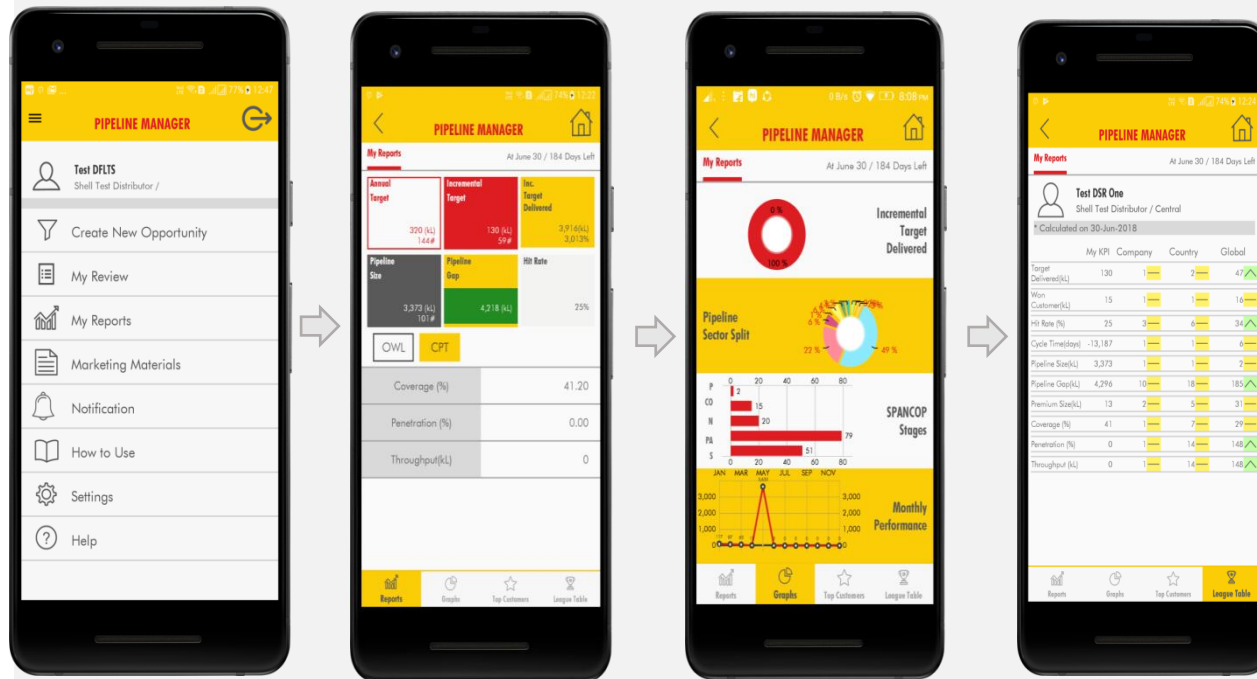


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Reports

- KPI View
- Chart View of KPI and sector wise split
- Top 5 Opportunity
- League Table for



Notes

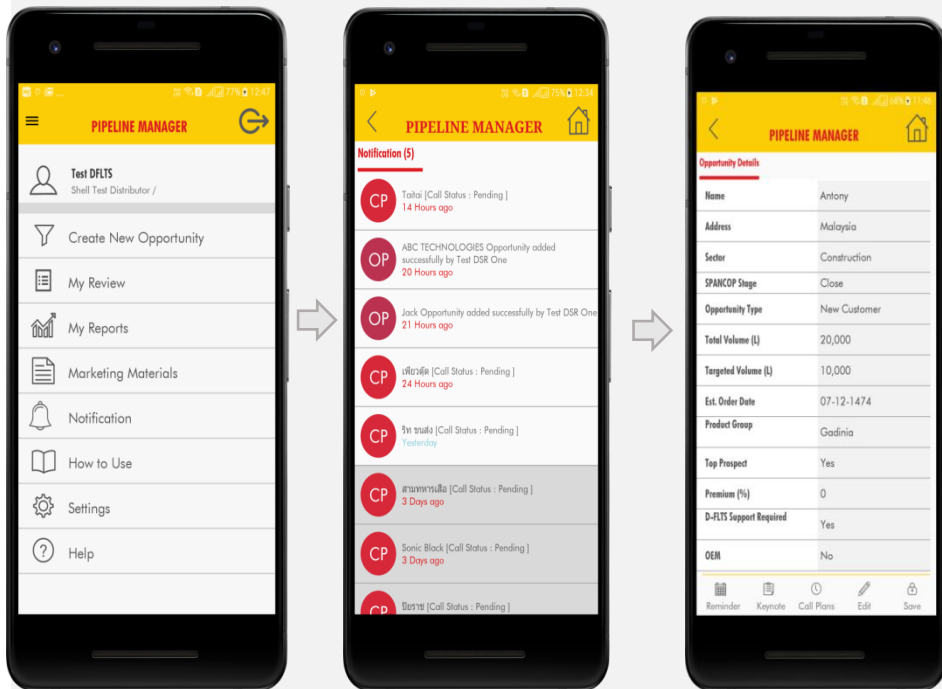
- Click on icon and bottom menu to view different reports
- Click on chart to view bigger chart view
- League table will show your performance. And your ranking with in the system.



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Notification

- Receiving Notification
- Viewing Notification
- Action on Notification
- Deleting Notification



Notes

- Be online to receive proper notification
- Notification will be sent on the date of call plan
- You will receive notification if DSM / DFLTS adds new opportunity for you
- CP - Call Plan Notification (Click to view call plan details)
- OP – Opportunity Notification (Click to view opportunity details)
- Delete by sliding left or right based on device type

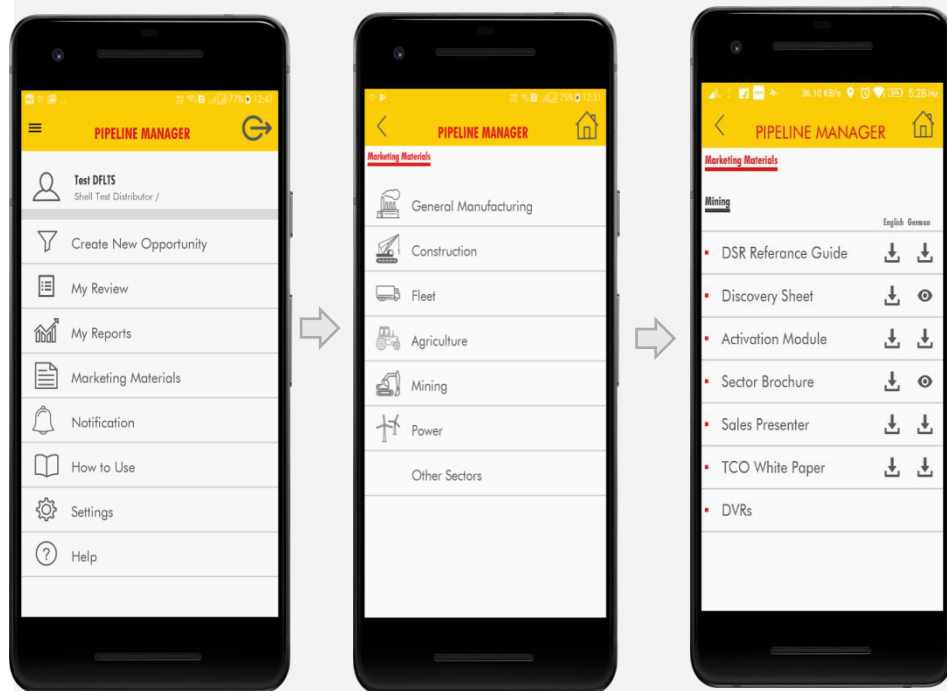


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Marketing Material

- Select Sector
- View Support Documents Available
- Download Documents
- View downloaded documents



Notes

- Documents are available in both English and Local Language based on the country.
- Documents will be downloaded only when you click on same. Once it is downloaded and available in your mobile, click on view icon to view.
- If new version of document is released system will indicate, new document available. You can download new or keep old version.
- You can share documents to customer, through WhatsApp or email based on your device applications.

