

# PIPELINE MANAGER

From Amshuhu iTech Solutions Pvt. Ltd.

## DSR Training Pack

Version 1.0



**iSteer**  
intelligently **Steer** your business





## DSR Activities

- Initial Set Up
- Opportunity Management
- Call Planning / POPSA
- Notification
- Marketing Material
- Reports Viewing

## Initial Set Up

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

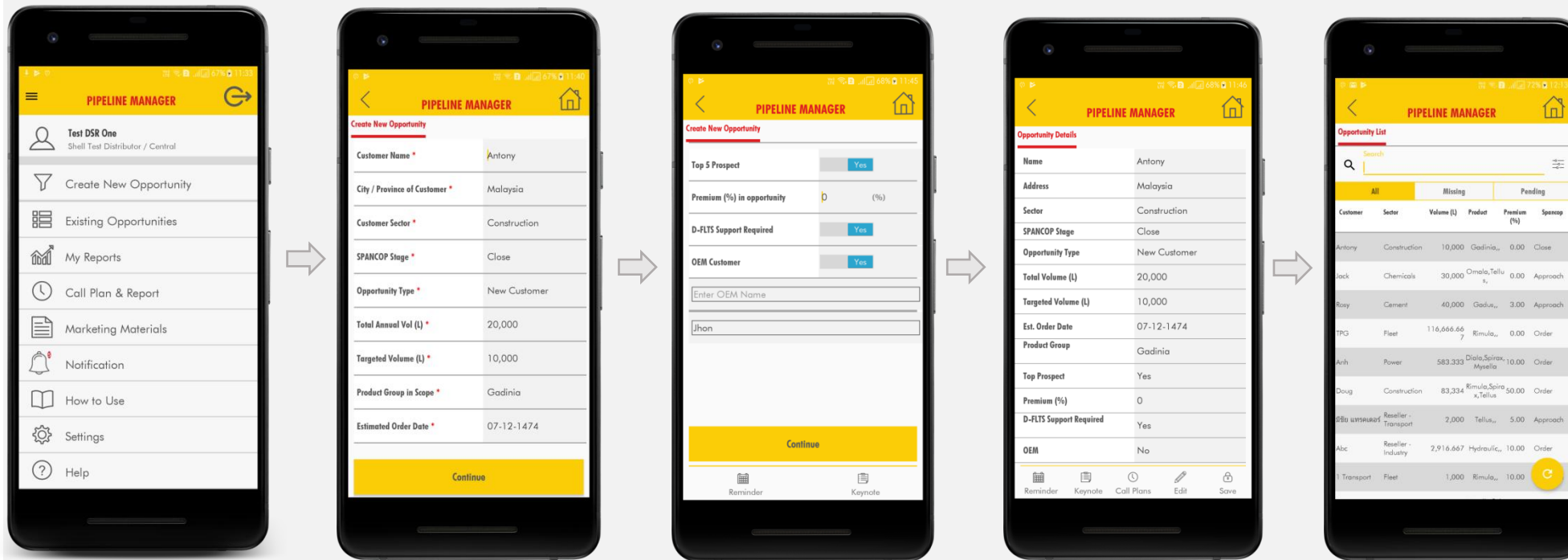


- DSR uses the received user name and password to login into the account

# DSR Training Pack

## Opportunity Management

- Creating New Opportunities
- Changing Status of Opportunities
- Changing Other Details in Opportunities
- Accepting / Rejecting Opportunity Uploaded by Shell team



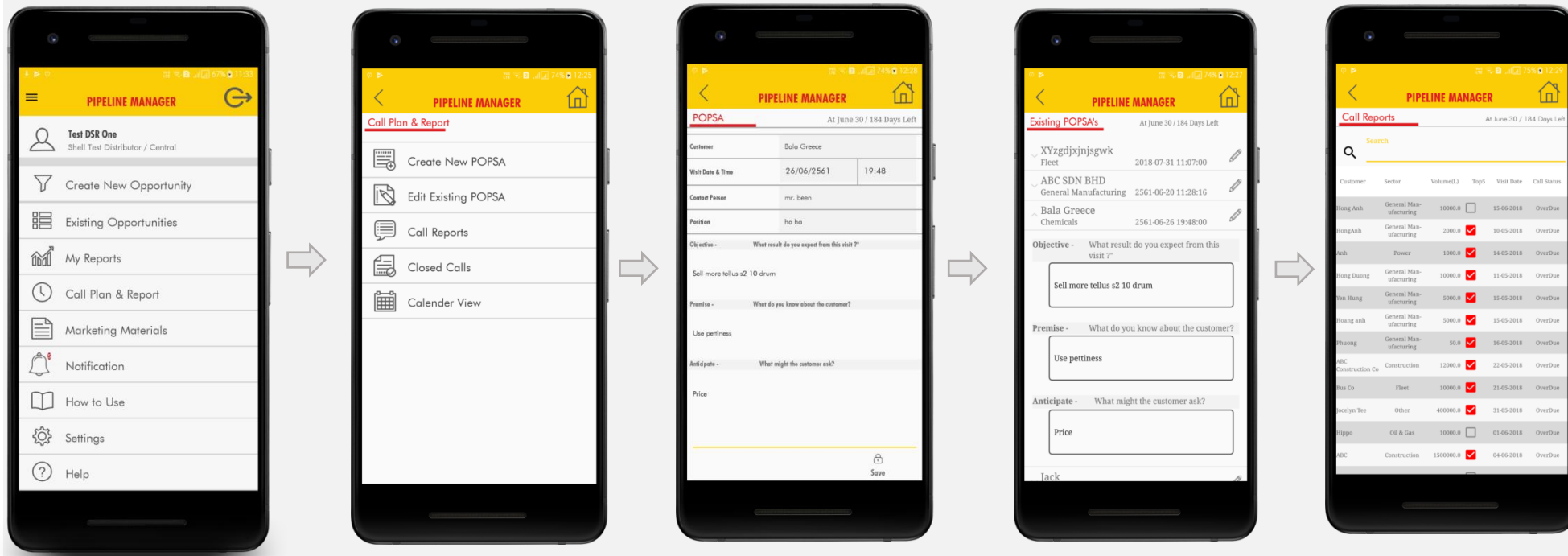
### Notes

- Click on opportunity status to change status
- Click on opportunity Name to view full details and click edit in bottom menu
- Click on pending in list title to view opportunities uploaded by shell and pending for your acceptance. On click you will see more details. You also have option to accept or reject . When accepted it will be added to your opportunity list. When you reject it will ask for reason.

# DSR Training Pack

## Call Planning and POPSA

- Creating New Call Plan / POPSA
- Modify future Call Plan / POPSA
- Close Pending Call Plan / POPSA
- Review old Call Plans / POPSA



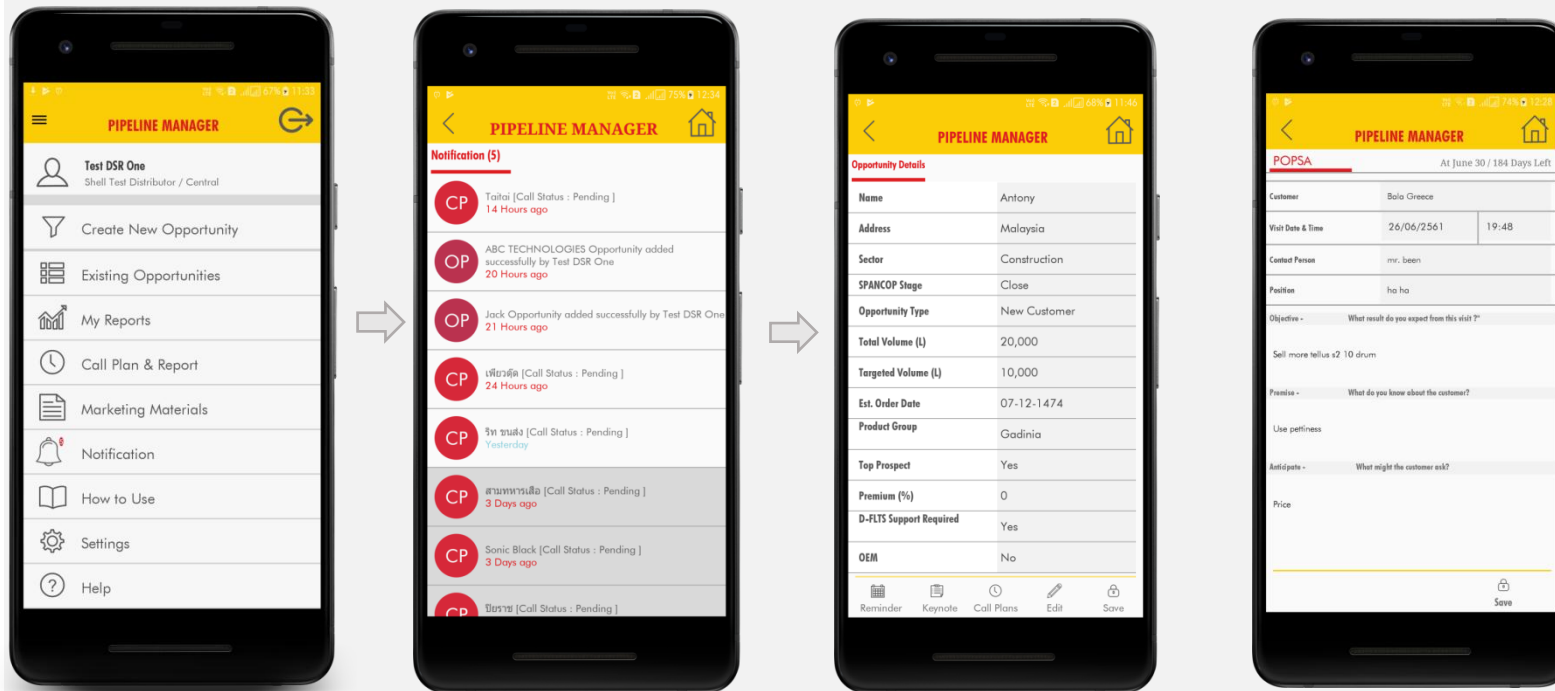
### Notes

- POPSA is optional
- After visiting customer update What was Discussed and Actions to complete the call. Till then it will be listed as Pending for 7 days after planned date. After 7 days it will be listed as overdue.
- Calendar view is also available for better planning.
- You will receive notification on mobile on the planned date.

# DSR Training Pack

## Notification

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



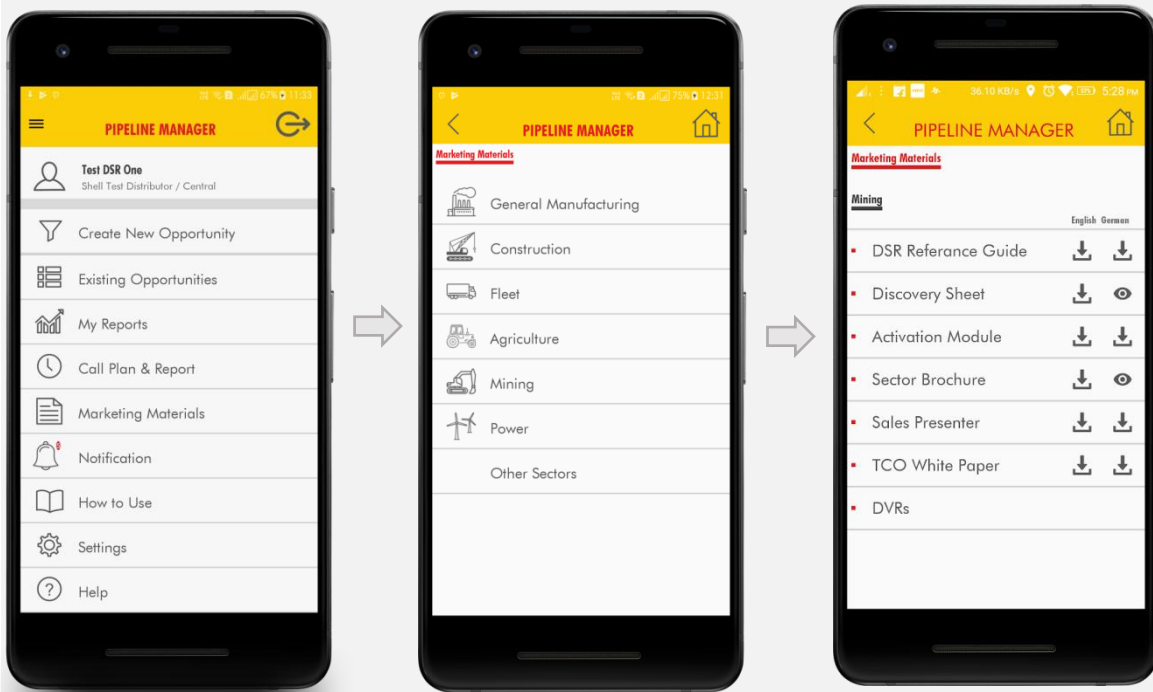
## Notes

- 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

# DSR Training Pack

## Marketing Material

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



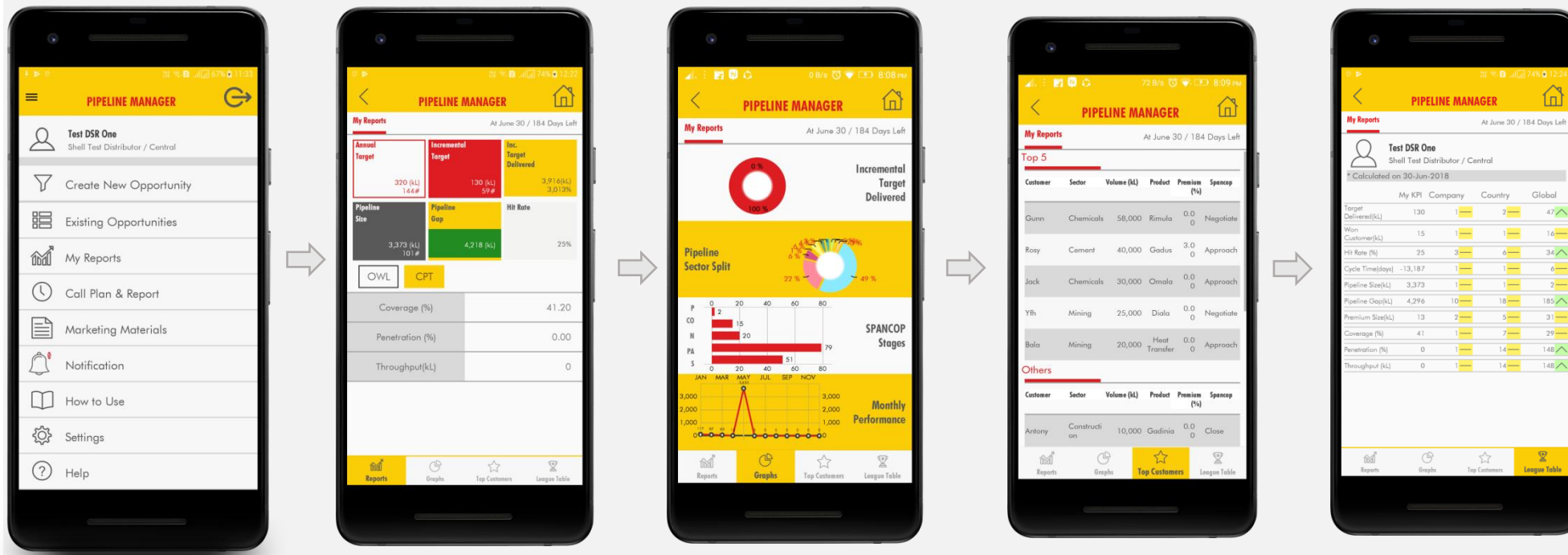
### Notes

- Documents are available in both English and Local Language based on the country.
- Document 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 could share documents to customer, through WhatsApp or email based on your device applications.

# DSR Training Pack

## 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 within the system.