# PIPELINE MANAGER

From Amshuhu iTech Solutions Pvt. Ltd.

## DSM Training Pack

Version 1.0

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# DSM Training Pack

**DSM Activities**

- Initial Set Up

- Basic Activities

- Annual Activities

- Monthly Activities

- Opportunity Management

- Reports Viewing

# DSM Training Pack

**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

# DSM Training Pack

## Basic Activities

- Create and Manage Branches

- Create and Manage Users



**Notes**

- **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**

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## Annual Activities

- Update Annual Target for all DSRs  (Sales)

- Update Annual Target for DFLTS  (Technical)



**Notes**

- **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.**

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## 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



**Notes**

- **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**

# DSM Training Pack

## 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



**Notes**

- 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.