

PIPELINE MANAGER

From Amshuhu iTech Solutions
Pvt. Ltd.

DSM Training Pack

Version 1.0









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

The screenshot displays the 'Shell Pipeline Manager' web application. On the left is a yellow sidebar with a navigation menu. The main content area shows the 'Masters > Branches' page. At the top right of the main area, it says 'Welcome To Shell Pipeline Manager' and 'TEST DSM ONE'. Below this is a table of branches. The table has columns for Branch Name, Address, Phone, Branch DSM, Email, Edit, and Status. The table contains 10 rows of branch data. At the bottom right of the table, there is a pagination control showing 'Rows per page: 10' and '1 - 8 of 8'.

Branch Name	Address	Phone	Branch DSM	Email	Edit	Status
Branch 1	Dhhdhd	1393888	East	branch1@shell.com		
Central	Church Street	09876545634		centralbm@shell.com		
East	Thomas Road	098765433456		eastbm@shell.com		
Ipoh	Ipoh	0121234567	Lee	shenchuan.lee@samchem.com.my		
Main Branch	Central	09876543223		shelltest@shell.com		
Melaka	Jalan Melaka Raya	010 1111111	Tom	tomtom@yahoo.com		
Negeri sembilan	Gdghdhdhddd	066512088	Kelly	hfghdhghd@gmail.com		
West	Street no1	098765433453		westbm@shell.com		

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)

Shell Pipeline Manager

Masters

Data

Annual Target Entry - Sales

Annual Target Entry - Technical

Monthly Actual Sales Entry

Opportunity List/Download

Opportunity Upload

Reports

Terms & Conditions

How to Use

Help

Data > Annual Target Entry - Sales

Welcome To Shell Pipeline Manager

TEST DSM ONE

Select Branch
All

CLEAR ALL

DSRs	Last Year Sales			This Year Target		Incremental Target		Estimated Universe		Next Year Impact of Won Customers	
	Volume (L)	No. of Customers	Estimated Churn Rate (%)	Volume (L)	No. of Customers	Volume (L)	No. of Customers	Volume (L)	No. of Customers	All Volume (L)	Premium Volume (L)
Abu Bakar	200,000.0	110	3	220,000.0	130	26,000.0	15	2,000,000.0	1,200	0.0	0.0
Lee	0.0	0	0	0.0	0	0.0	0	0.0	0	0.0	0.0
Mohd Ali	0.0	0	0	0.0	0	0.0	0	0.0	0	0.0	0.0
Test DSR Five	100,000.0	50	7	120,000.0	50	27,000.0	11	1,000,000.0	350	36,670.0	1,100.1
Test DSR Four	90,000.0	40	5	120,000.0	50	34,500.0	14	2,500,000.0	650	55,000.0	2,200.0
Test DSR One	200,000.0	90	5	320,000.0	144	130,000.0	58	2,600,000.0	500	255,226.7	154,666.4
Test DSR Six	120,000.0	50	5	150,000.0	52	36,000.0	12	2,500,000.0	700	55,000.0	3,025.0
Test DSR Three	120,000.0	30	3	150,000.0	50	33,600.0	11	2,000,000.0	530	73,340.0	3,667.0
Test DSR Two	100,000.0	50	2	120,000.0	50	22,000.0	9	1,500,000.0	470	64,160.0	2,108.1
Tom	100,000.0	55	10	140,000.0	77	50,000.0	28	1,450,000.0	470	0.0	0.0
Total	1,030,000.0	475	4.8	1,340,000.0	603	359,100.0	158	15,550,000.0	4,870	539,396.7	166,766.6

Rows per page: 10 1 - 10 of 10 < > >>

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)

Shell
Pipeline Manager

Masters >

Data >

Annual Target Entry - Sales

Annual Target Entry - Technical

Monthly Actual Sales Entry

Opportunity List/Download

Opportunity Upload

Reports >

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How to Use >

Help

Data > Monthly Actual Sales Entry

Welcome To Shell Pipeline Manager

TEST DSM ONE

Select Branch
All

UPLOAD SALES

CLEAR ALL

DSRs	Jun-2018		May-2018		Apr-2018		Mar-2018		Feb-2018		Jan-2018	
	Volume (L)	No. of Customers	Volume (L)	No. of Customers	Volume (L)	No. of Customers	Volume (L)	No. of Customers	Volume (L)	No. of Customers	Volume (L)	No. of Customers
Abu Bakar	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
Lee	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
Mohd Ali	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
Test DSR Five	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
Test DSR Four	0.0	0	0.0	0	9,000.0	7	0.0	0	0.0	0	0.0	0
Test DSR One	0.0	0	0.0	0	11,000.0	8	15,000.0	10	0.0	0	0.0	0
Test DSR Six	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
Test DSR Three	0.0	0	0.0	0	8,000.0	6	0.0	0	0.0	0	0.0	0
Test DSR Two	0.0	0	0.0	0	9,000.0	7	0.0	0	0.0	0	0.0	0
Tom	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0
Total	0.0	0	0.0	0	37,000.0	28	15,000.0	10	0.0	0	0.0	0

Rows per page: 10 1 - 10 of 10

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

Shell Pipeline Manager

Data > Opportunity List/Download

Welcome To Shell Pipeline Manager

TEST DSM ONE

Select Sector: All Opportunity Type: All SPANCOP Stage: All Customer Type: All Top 5 Customer: All

Premium: All DFITS Support: All Select Branch: All Select DSR: All

Q SEARCH

<input type="checkbox"/>	Customer Name	DSR	Sector	Volume (t)	SPANCOP	Product	Premium (%)	Opportunity Type	Top5	Edit	Delete
<input type="checkbox"/>	ABC	Test DSM One	General Manu	10,000.0	Prospect	Tellus, Omala, Gadus	20.0	New Customer	Yes		
<input type="checkbox"/>	Abc	Test DSM One	Fleet	50,000.0	Prospect	Rimula, Gadus	10.0	New Customer	Yes		
<input type="checkbox"/>	XYZ	Test DSM One	Fleet	50.0	Approach	Omala	0.0	New Customer	Yes		
<input type="checkbox"/>	Ghu	Test DSM One	Construction	36.0	Approach	Heat Transfer, Helix, Morlina	0.0	Cross Sell	No		
<input type="checkbox"/>	Golden Season	Test DSM One	Fleet	13,000.0	Prospect	Rimula, Spirax, Gadus	70.0	New Customer	No		
<input type="checkbox"/>	ABC	Test DSM One	Fleet	1,000.0	Suspect	Rimula	0.0	New Customer	No		

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



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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

Shell Pipeline Manager

Masters >

Data >

Reports >

Pipeline Dashboard

SPANCOP Dashboard

OWL Dashboard

CPT Dashboard

DSRs League Table

DFLTS League Table

Top 5 Customer

Sector Split

Product Split

Call Planning

Calendar View

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How to Use >

Reports > Pipeline Dashboard

Welcome To Shell Pipeline Manager

TEST DSM ONE

Summary

DSR wise Details

	Overall Distributor	Central Overall	West Overall	East Overall
Suspect				
Volume (Kl)	1,270.8	850.8	20.0	400.0
No. of Customers	52	50	1	1
Prospect				
Volume (Kl)	2,474.6	1,773.6	621.0	80.0
No. of Customers	73	67	4	2
Approach				
Volume (Kl)	965.6	845.6	40.0	80.0
No. of Customers	57	52	2	3
Negotiate				
Volume (Kl)	666.9	456.9	110.0	100.0
No. of Customers	35	29	3	3
Close				
Volume (Kl)	794.0	330.0	464.0	0.0
No. of Customers	7	6	1	0
Order				
Volume (Kl)	651.6	640.0	5.8	5.8
No. of Customers	19	15	2	2
Payment				
Volume (Kl)	279.6	271.3	5.8	2.5
No. of Customers	6	3	2	1

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.

