CEAT Sales Forces Dashboard
Territory Lead - UX Document

Version. 01

Date: 11 January 2019

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TL

Sales Force Portal

Territory Lead will login to do their day to day task and reporting.

TL Visitis:
- Dealers
- Fleets
- Leads
- Customers

Daily Work Management

The user has defined a PJP as per his Monthly & Annual Planning.
based on this he will achieve his target.

Customers

TL - 3 kinds of customers
- Dealers
- Fleets
- Leads/Consumers

Planning

TL does a year & Monthly planning and based on this he defines his PJP and works on his target

Reports

This a repository of all the reports that he refers to obtain his goal

Marketing

PJP

His PJP is Pre-defined(by him), he now goes on the field

Dealer

He visits each of the dealers as per his PJP and checks the on-their status of business with payments, orders & Claims/Complaints

Fleet

He visits each of the fleets and also sells the brand also check does the inspection of tyre

Leads & Consumer

He also goes to the market to based on leads to convert them into customer

- 1 Landing Page
  - 2 Dashboard (Default view)
    - 3 Budget vs Achievement
    - 3 PJP Plan vs Achievement
    - 3 Digital Initiative -App.through Order ,E-Claim , Payment gateway
    - 3 Incentive
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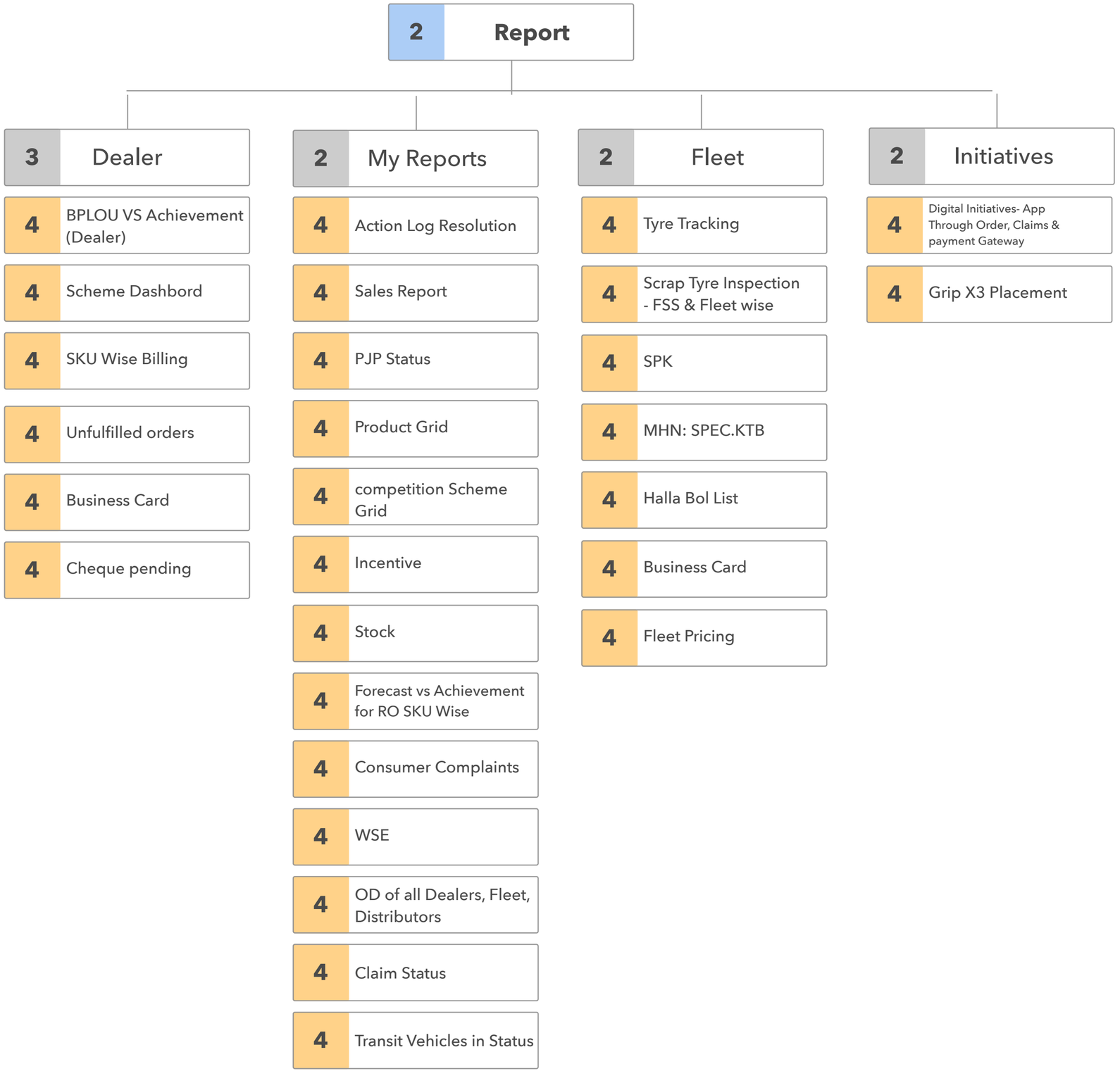
    - 3 Claims
  - 2 Planning
    - 3 PJP Planning
    - 3 Monthly Planning
    - 3 Yearly Planning
    - 3 DAP
  - 2 Report
    - **Bucketing of Reports - TL**
    - 3 Dealer
    - 3 My Reports
    - 3 Fleets
    - 3 Initiatives
  - 2 Marketing
    - 3 Leads
    - 3 Branding Status
    - 3 Campaigns
    - 3 Schemes
    - 3 competitor Analysis
    - 3 e-Catalog
    - 3 Price List
    - 3 Sales Promotion
  - 2 Support
    - 3 Regional Team
    - 3 Company Directories
    - 3 Escalation Matrix
    - 3 Broadcast Message
    - 3 Marketing Collateral
    - 3 User Manual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4 Consumer Complaints
4 WSE
4 OD of all Dealers, Fleet, Distributors
4 Claim Status
4 Transit Vehicles in Status
2 Fleet
4 Tyre Tracking
4 Scrap Tyre Inspection - FSS & Fleet wise
4 SPK
4 MHN: SPEC.KTB
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4 Business Card
4 Fleet Pricing
2 Initiatives
4 Digital Initiatives- App Through Order, Claims & payment Gateway
4 Grip X3 Placement

CEAT Sales Forces Dashboard - Territory Lead Dashboard & Report Navigation

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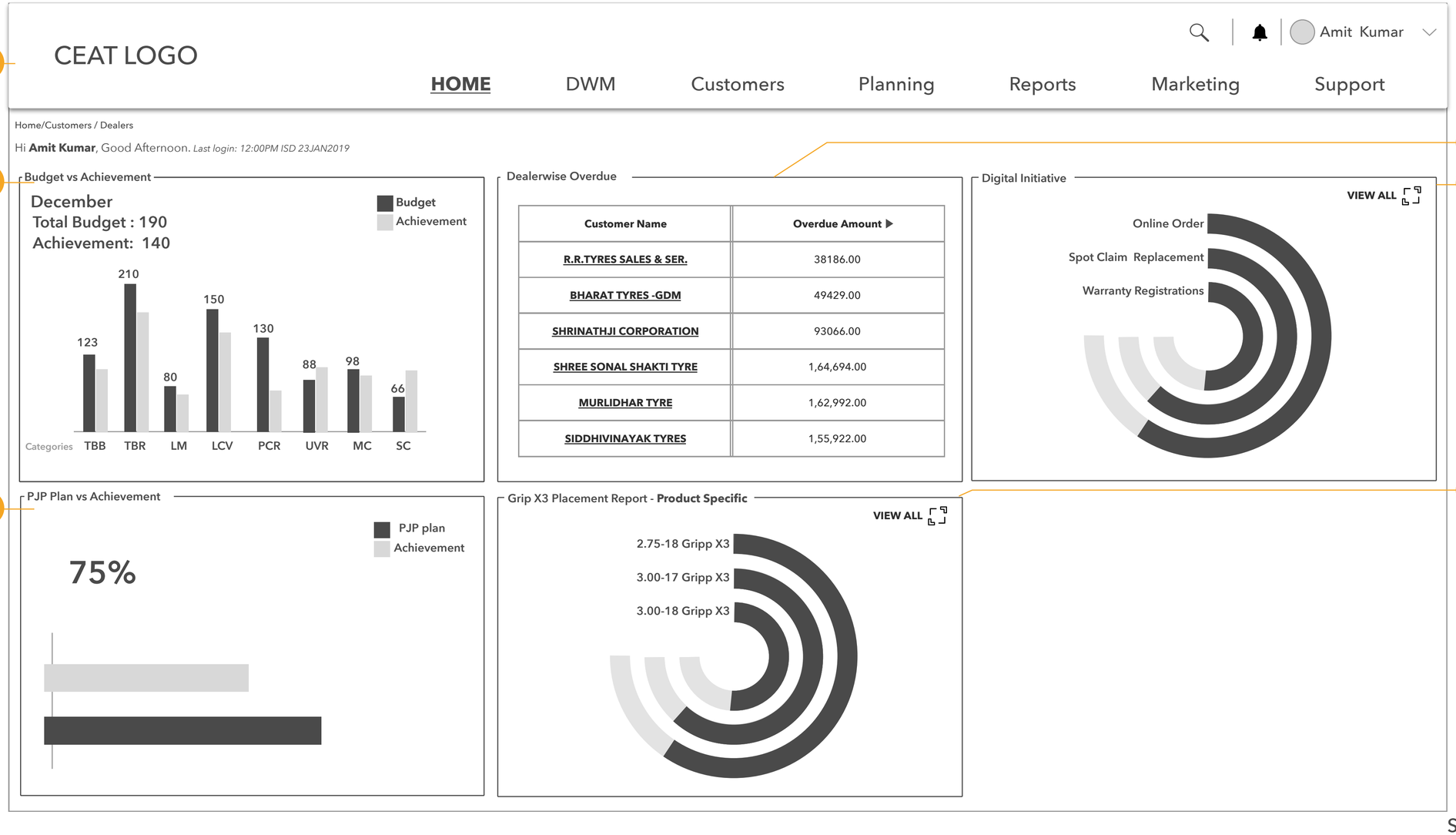
Page Break - My Customer Flow 12

Screen Resolution 1366×768

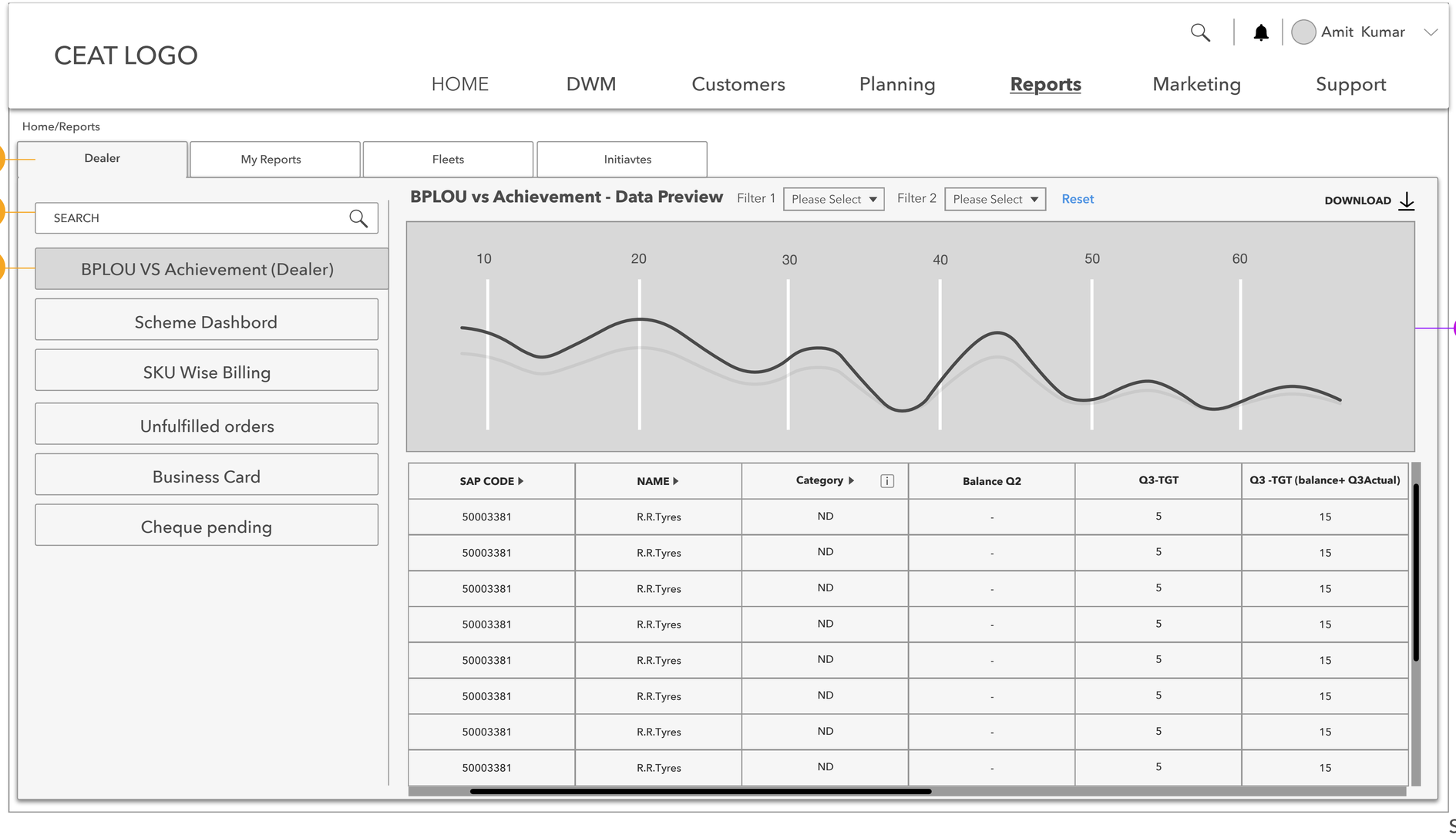


Annotations

1. Top Navigation as per sitemap (To be updated as per business) Key Navigation L1
2. Budget vs Achievement
   Snapshot view of Budget plan and achievement for each category
3. PJP plan vs Achievement
   - The PJP for each week and achievement as per the current date
4. Dealer Wise Overdue
   - This is tabular data of dealers of their overdue
   The arrangement is as per the priority of payments to be made
5. Digital Initiatives
   The Current initiatives that are running their acceptance rate in the market is shown here.
6. Product Placement
   The Current product placement in marktet and their performance.

Screen Break

Screen Resolution 1366×768



Annotations

1 Sub- Navigation of Reports
These reports are bucketed as pe their usage.

2 Dealer Report - Specific Search for each report in this category

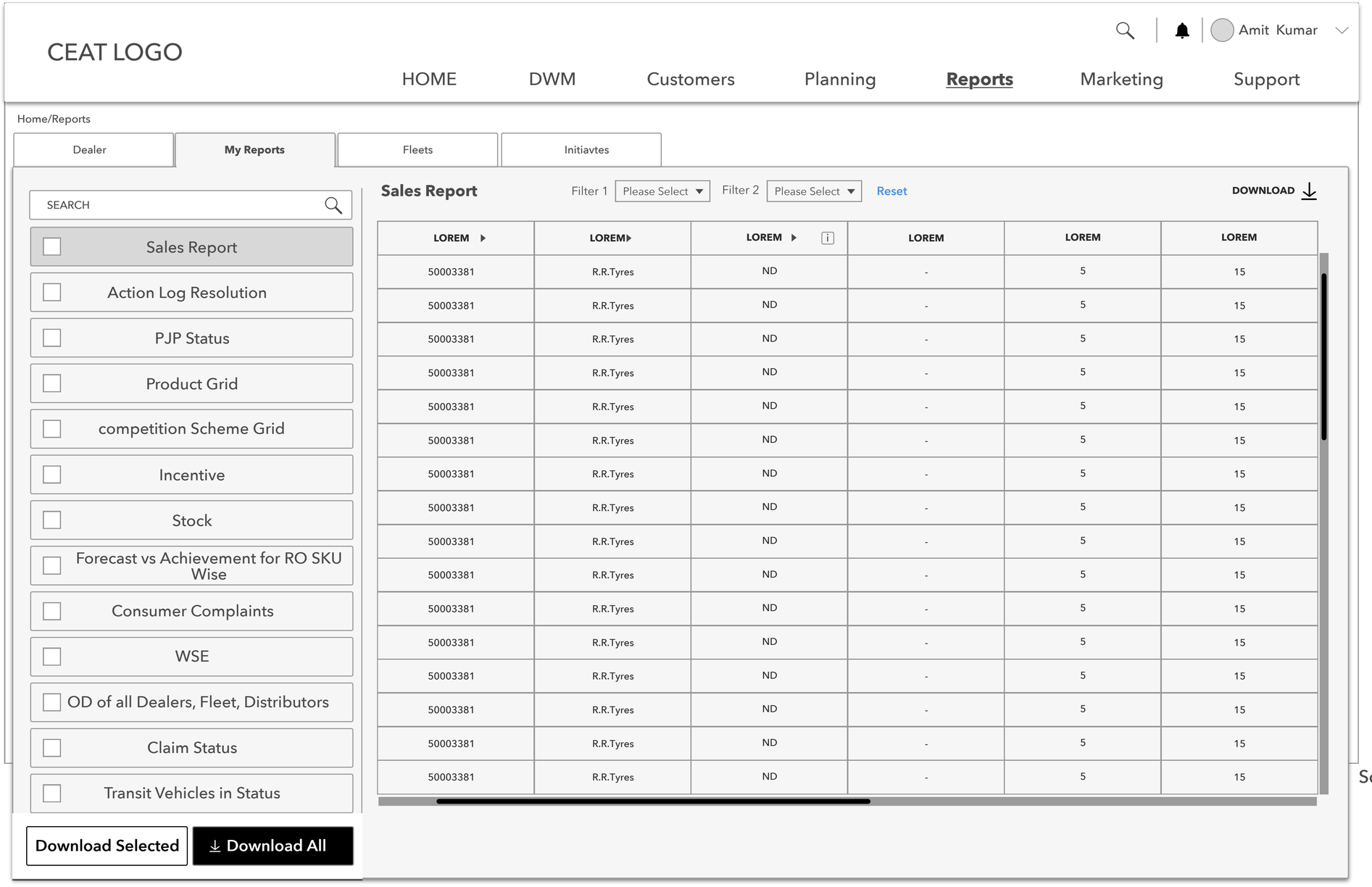
3 BPLOU VS Achievement (Dealer)
- This a Report with Snapshot view visible by default

TL can filter specific to the current report and Download the report for as per their use.

A Chart View - Depends on Quarterly view or Monthly view Based on the business call,
This can be an applied view on all other sub tabs based on business requirement.

Screen Break

Screen Resolution 1366×768



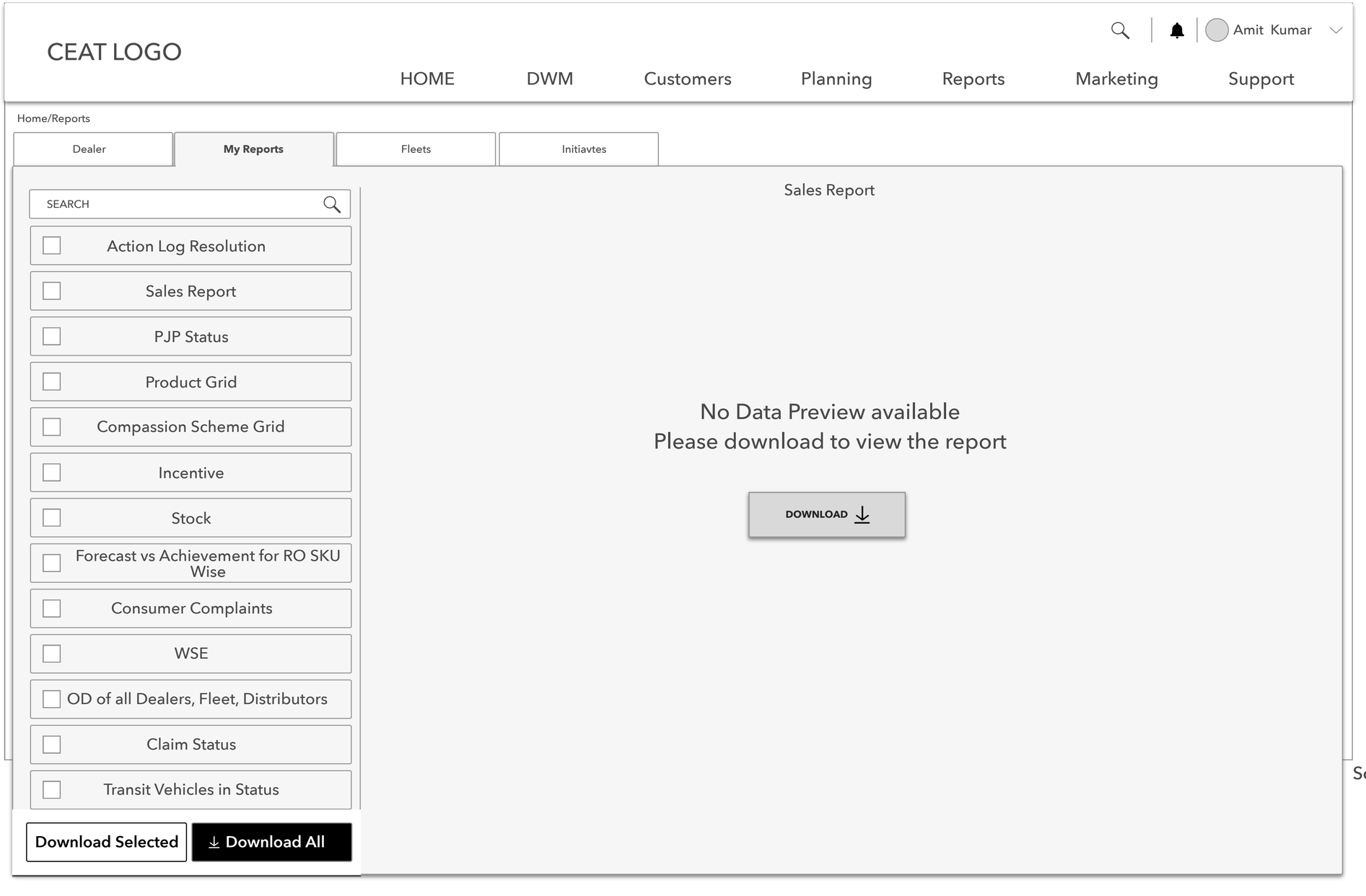
Annotations

1 My Report - View

By Default the user can view the sales report in the data preview.

Screen Break

Screen Resolution 1366×768



Screen Break

Annotations

1 Data Preview Unavailable for theis report.

Note: This an exception senario (this view totally depends on the data that can not be shown in th window.)

Screen Resolution 1366×768

CEAT LOGO

HOME DWM Customers Planning **Reports** Marketing Support

Amit Kumar

Home/Reports

Dealer | My Reports | **Fleets** | Initiavtes

SEARCH

- Tyre Tracking
- Scrap Tyre Inspection - FSS & Fleet wise
- SPK
- MHN: SPEC.KTB
- Halla Bol List
- Businesses Card
- Fleet Pricing

Tyre Tracking Report

Filter 1 Please Select Filter 2 Please Select Reset

DOWNLOAD

Customer Number	Customer Name	Vehicle No.	Tyre brand	Tyre Pattern	Wheel Position
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15
50003381	R.R.Tyres	ND	-	5	15

Screen Break

Annotations

1 Filter view - interaction
This is a sample view of the filter not an actual data.

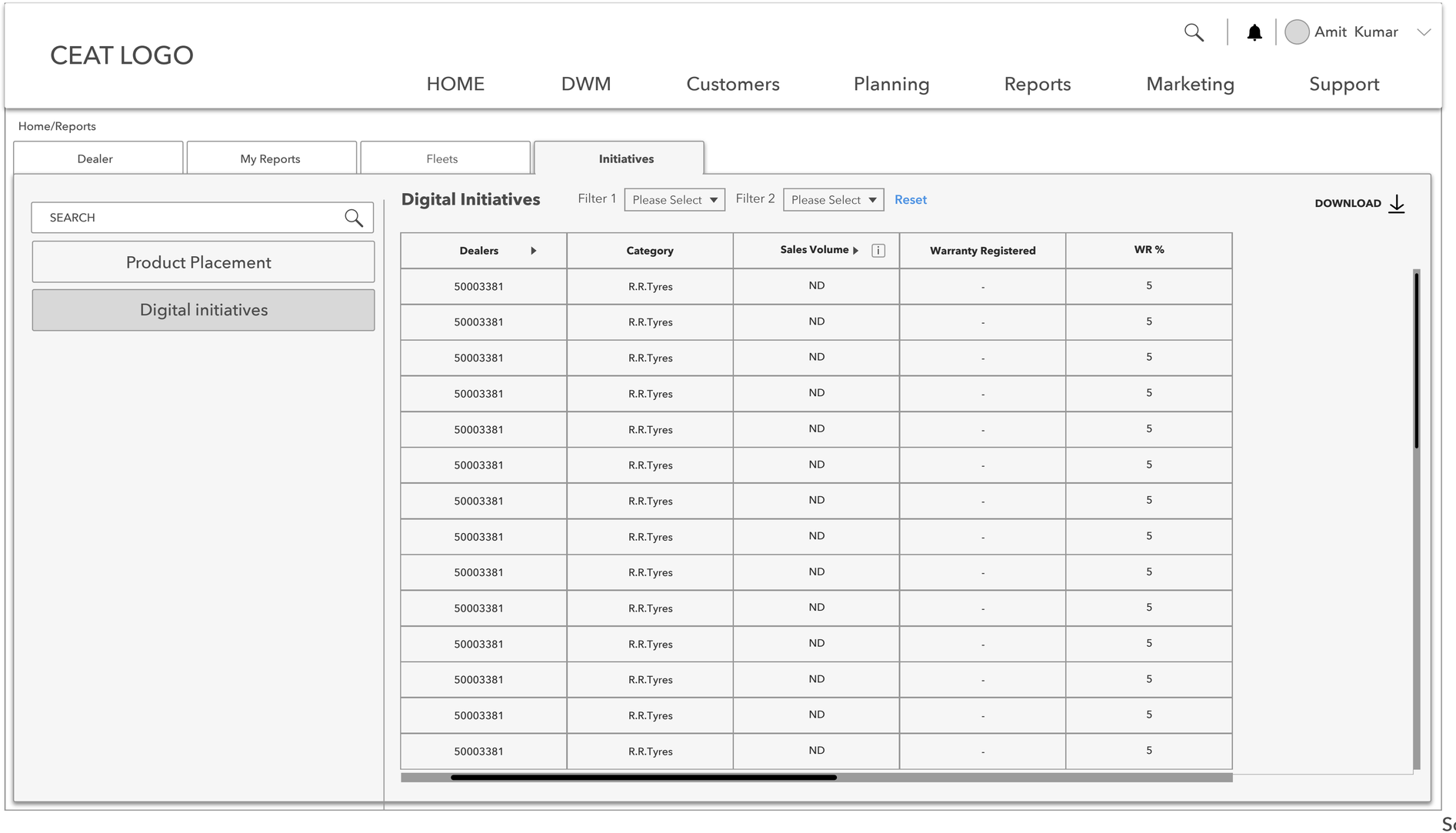
Filter 1: Customised

- Brand → Brand 1, Brand 2, Brand 3, Brand 4
- Customer
- Wheel Position
- TBB/TBR

Filter 2: Lorem

- Lorem 1 → Front Right, Front Left, Left hand side back, Left hand side back
- Lorem 2
- Lorem 3
- Lorem 4

Screen Resolution 1366×768



Annotations

1 Initiatives View
Limited columns view

Screen Break

Screen Resolution 1366×768

CEAT LOGO

Amit Kumar

Home DWM **Customers** Planning Reports Marketing Support

Home/Customers / Dealers

Dealer | Fleet | Claim | Complaint

SEARCH

Filter

DOWNLOAD

SAP CODE	NAME	Category	Balance Q2	Q3-TGT	Q3 -TGT (balance+ Q3Actual)	Q-3 ACHV OCT	Q-3ACHV NOV
50003381	R.R.Tyres	ND	-	5	15	6.23	3.9
50003381	R.R.Tyres	ND	-	5	15	6.23	3.9
50003381	R.R.Tyres	ND	-	5	15	6.23	3.9
50003381	R.R.Tyres	ND	-	5	15	6.23	3.9
50003381	R.R.Tyres	ND	-	5	15	6.23	3.9
50003381	R.R.Tyres	ND	-	5	15	6.23	3.9
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50003381	R.R.Tyres	ND	-	5	15	6.23	3.9
50003381	R.R.Tyres	ND	-	5	15	6.23	3.9
50003381	R.R.Tyres	ND	-	5	15	6.23	3.9
50003381	R.R.Tyres	ND	-	5	15	6.23	3.9
50003381	R.R.Tyres	ND	-	5	15	6.23	3.9

Annotations

1 Top Navigation as per sitemap

Screen Break

Page Break
Customer Flow

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Wireframe - Customer Flow

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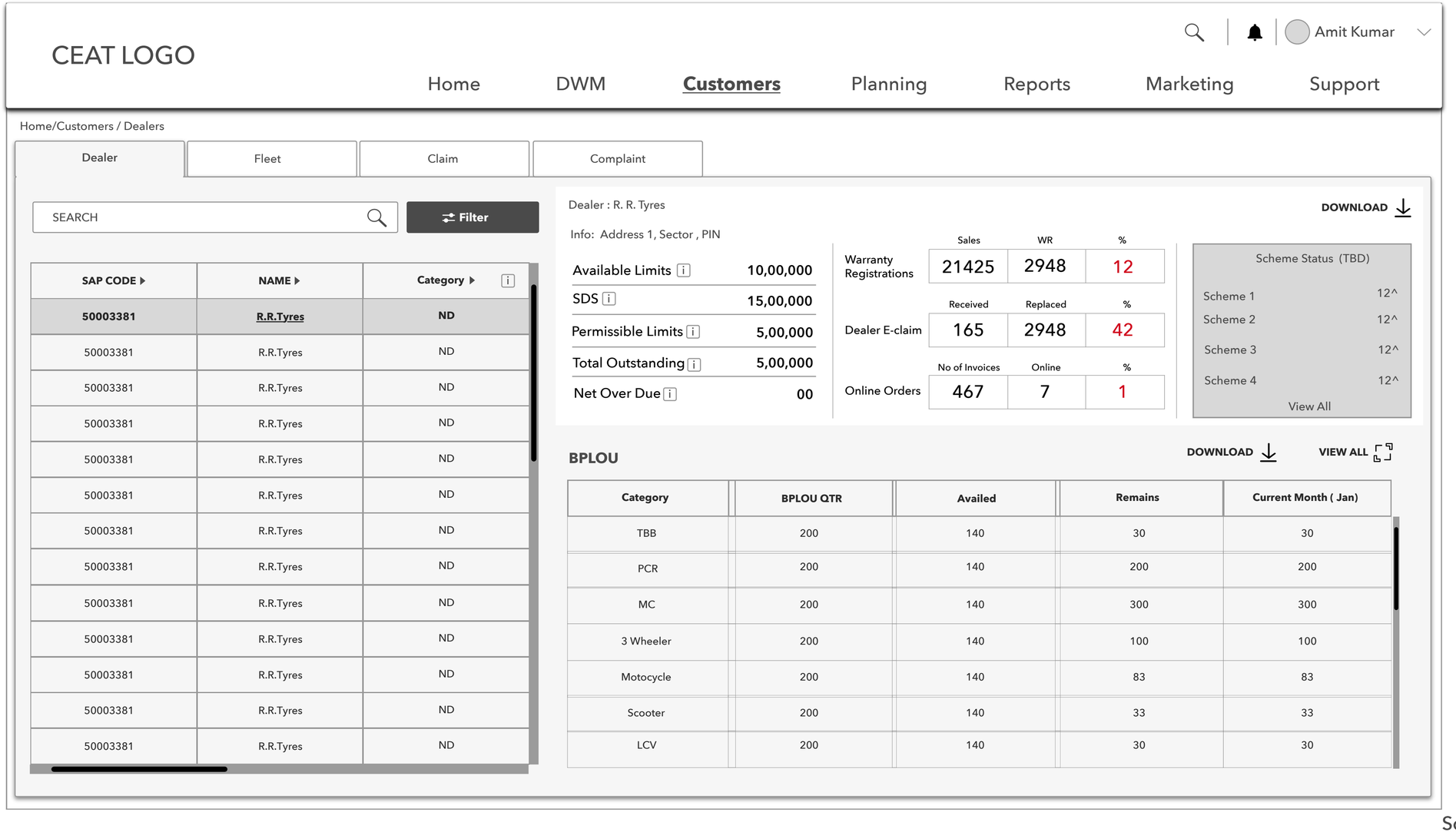
Screen Resolution 1366×768



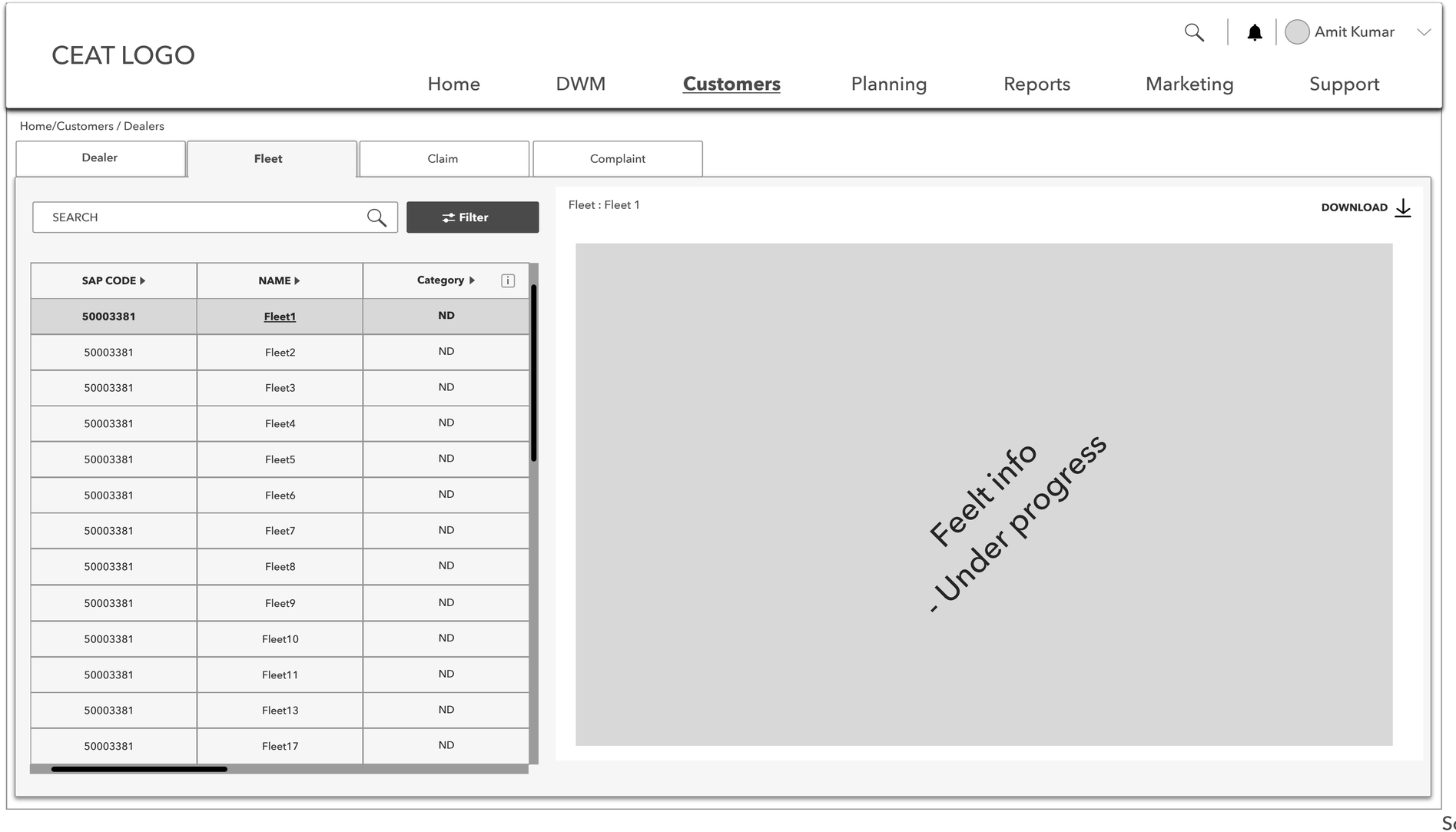
Annotations

1 Selected Dealer View

Info about the dealer, Warranty, Schemes & BPLOU

Screen Break

Screen Resolution 1366×768



Annotations

1 Selected Fleet View

Info about the dealer, Warranty, Schemes & BPLOU

Screen Break