CEAT Sales Forces Dashboard
Territory Lead - UX Document

Version. 2

Date: 25 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.

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

Customers

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

Fleet

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

Planning

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

Leads & Consumer

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

Reports

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

Marketing

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    - 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 Escalation Matrix
    - 3 Broadcast Message
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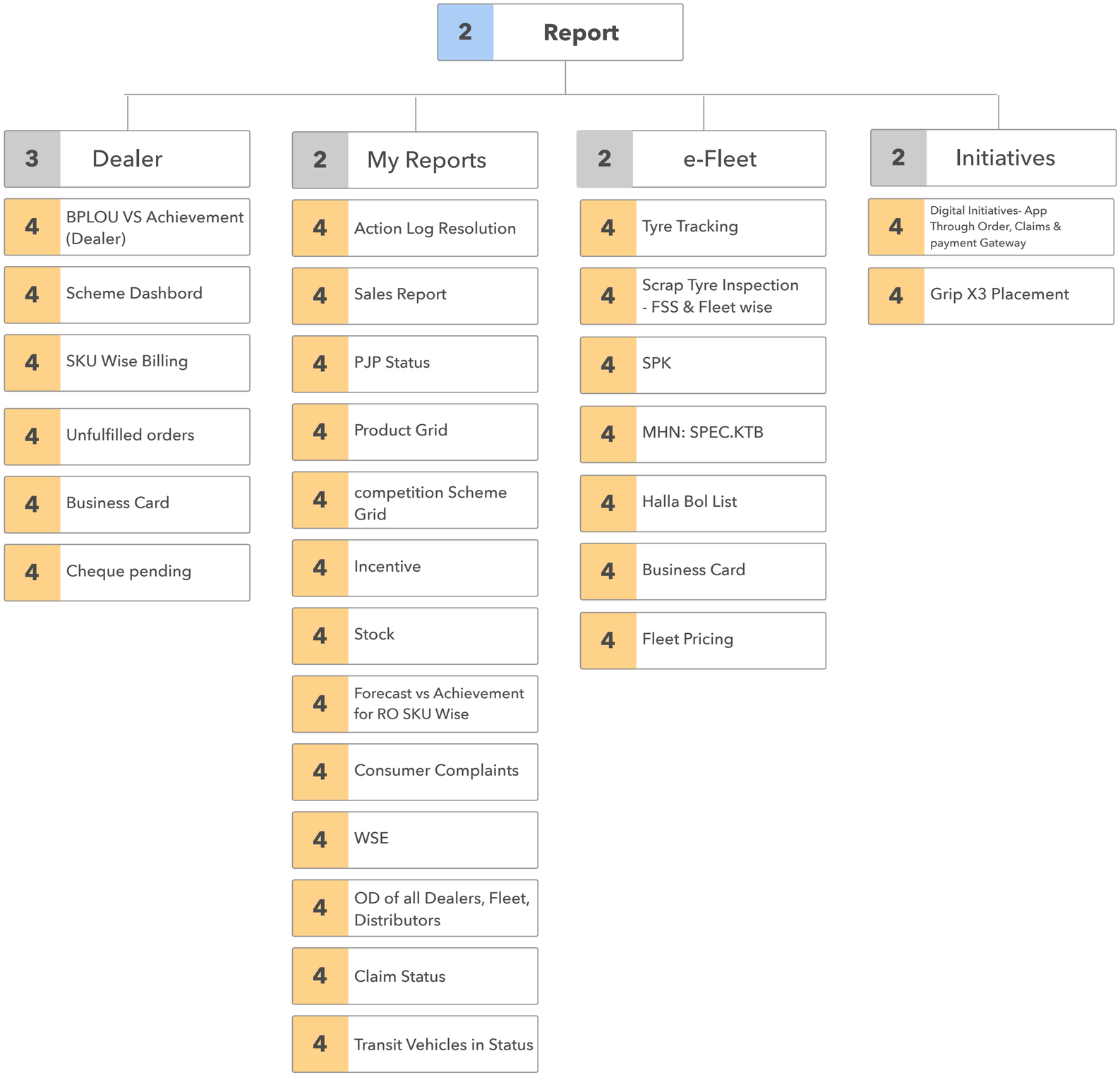
    - 3 User Manual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4 Consumer Complaints
4 WSE
4 OD of all Dealers, Fleet, Distributors
4 Claim Status
4 Transit Vehicles in Status
2 e-Fleet
4 Tyre Tracking
4 Scrap Tyre Inspection - FSS & Fleet wise
4 SPK
4 MHN: SPEC.KTB
4 Halla Bol List
4 Business Card
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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Screen Resolution 1366×768

CEAT LOGO

HOME DWM Customers Planning Reports Marketing Support

Amit Kumar

Home/

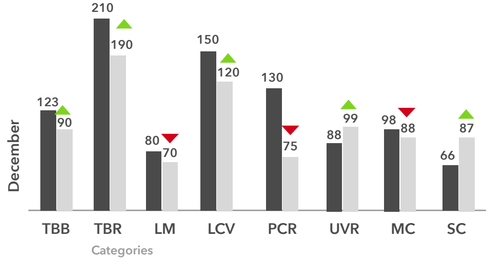
Hi **Amit Kumar**, Good Afternoon. *Last login: 12:00PM ISD 23JAN2019*

Forecast vs Achievement

Forecast : 140
Achievement: 120

86%

Budget
Achievement



Dealerwise Overdue

Customer Name	Overdue Amount ▶
R.R.TYRES SALES & SER.	38186.00
BHARAT TYRES -GDM	49429.00
SHRINATHJI CORPORATION	93066.00
SHREE SONAL SHAKTI TYRE	1,64,694.00
MURLIDHAR TYRE	1,62,992.00
SIDDHIVINAYAK TYRES	1,55,922.00

Action Logs

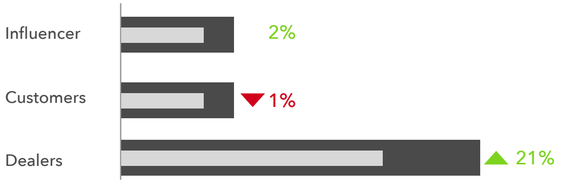
5 Pending in next 6 days

Dealer / Fleet	Description	Resolution Time
B.K Tyres	In-Shop Branding	23/01/2019
A1 Tyres	Claim Pending	13/01/2019
B1 Tyres	CN issue	03/01/2019
C1 Tyres	Scheme issue	03/01/2019

PJP Plan vs Achievement

75%

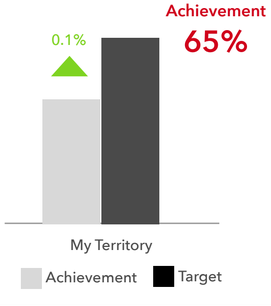
PJP plan
Achievement



Incentive Tracker

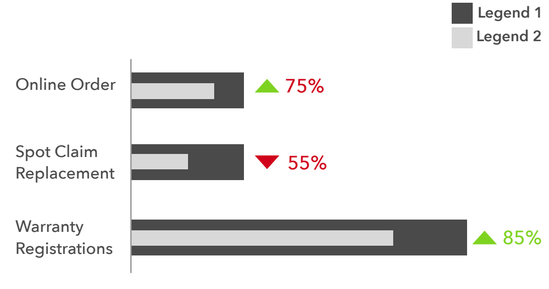
Part B
Achievement vs Target

Part A
RO Percentage



Achievement
60%

Digital Initiative



Screen Break

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

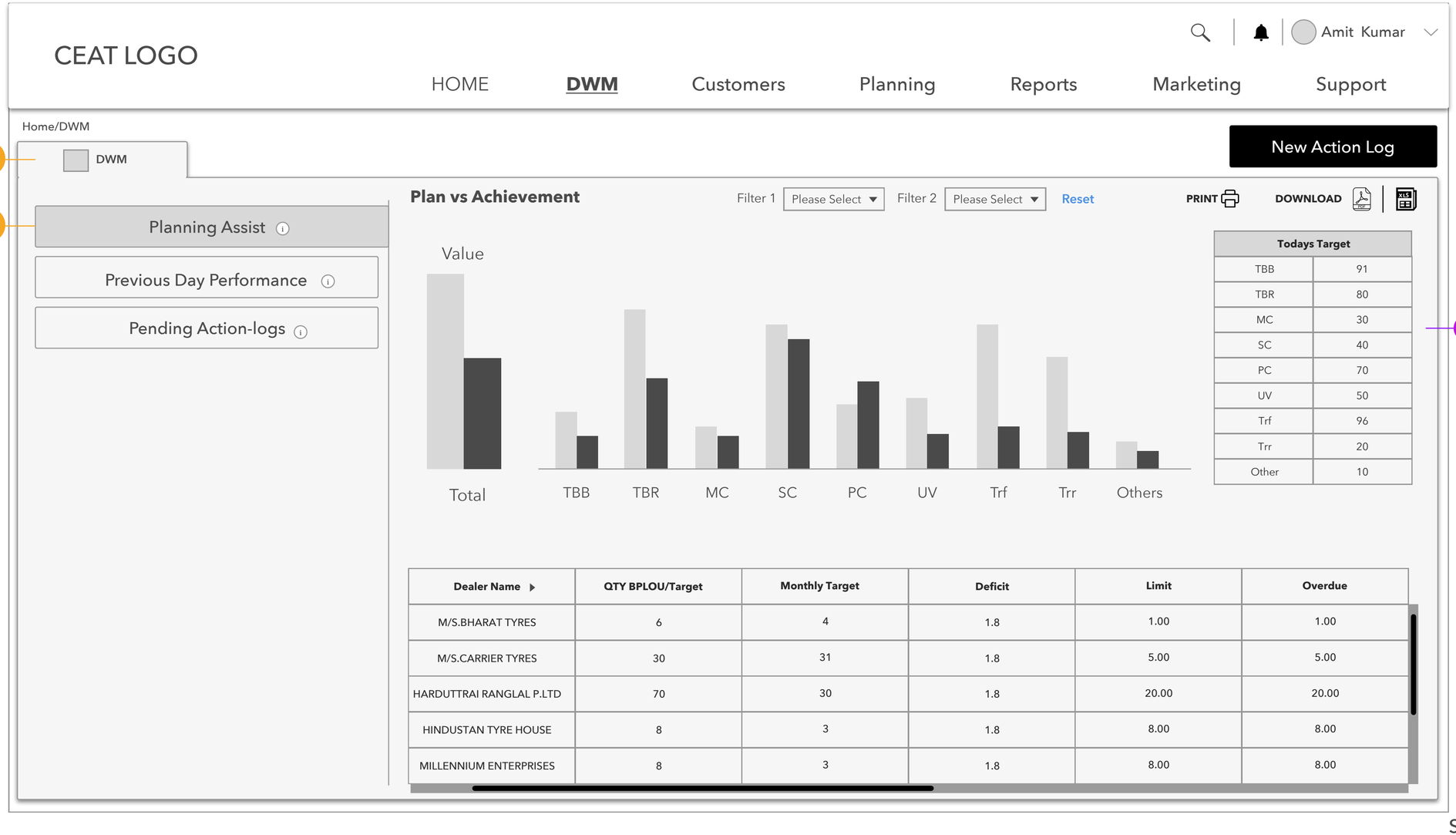
4 Dealer Wise Overdue
- This is tabular data of dealers of their overdue
The arrangement is as per the priority of payments to be made

5 Action Logs.

6 Incentive Tracker
for RO Percentage & Achivement vs Target

7 Digital Initiative

Screen Resolution 1366×768



Screen Break

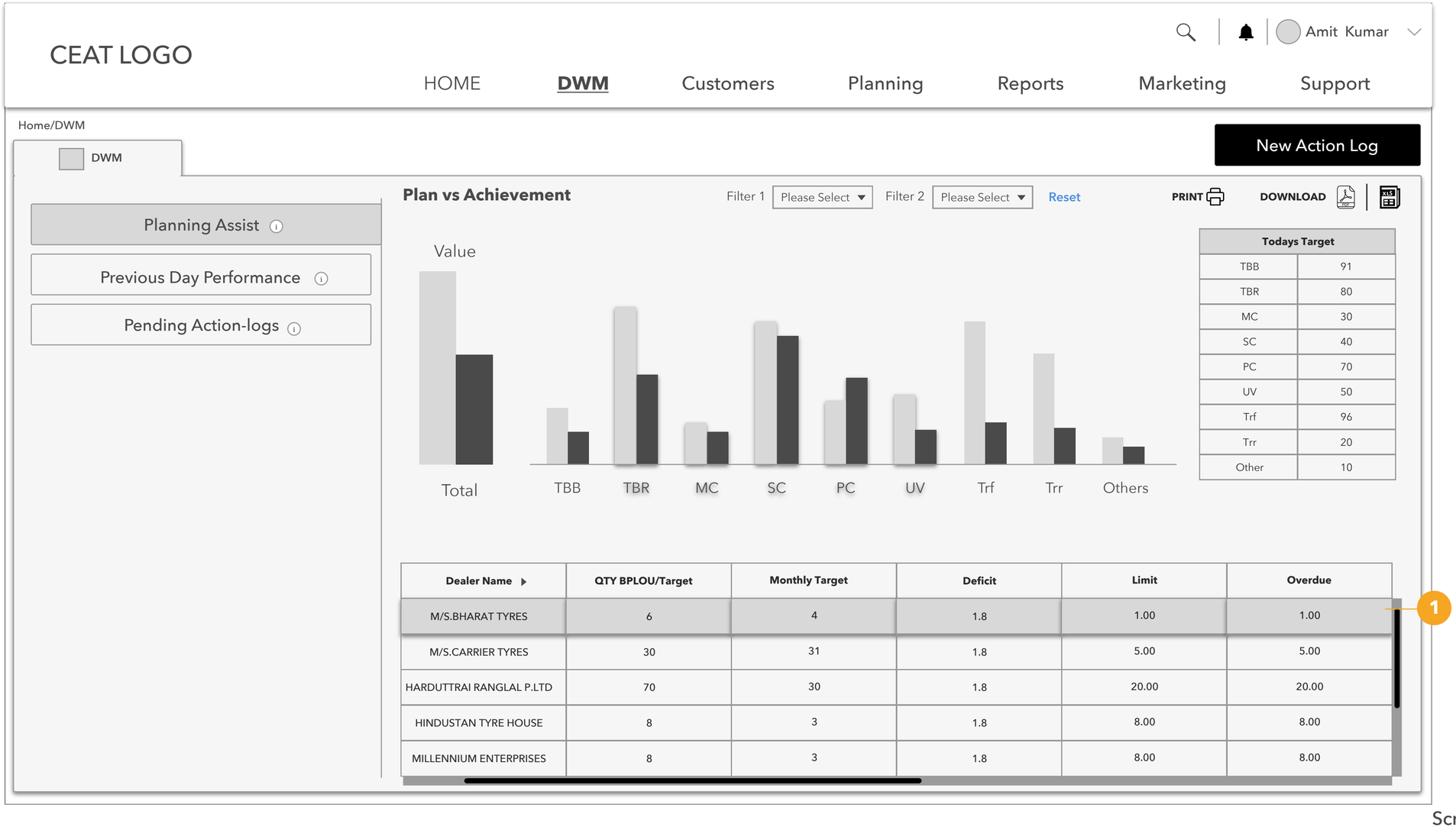
Annotations

1 DWM
Daily | Weekly | Monthly View have to be discussed

2 Planning Assist

A Todays Target

Screen Resolution 1366×768

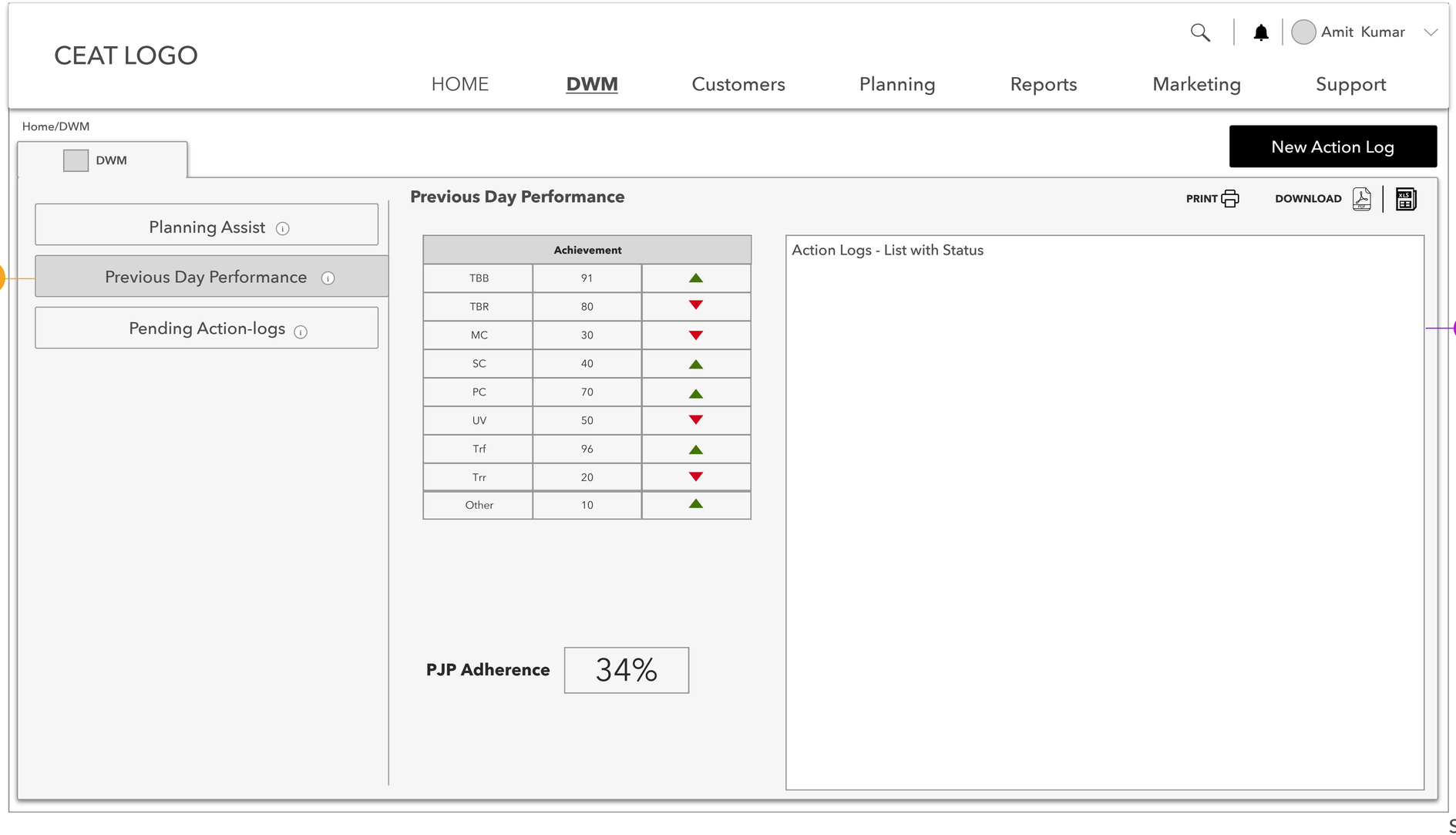


Screen Break

Annotations

1 On-Click the Graph(stats) get higlighted with relavent categories of business of that specific dealer

Screen Resolution 1366×768



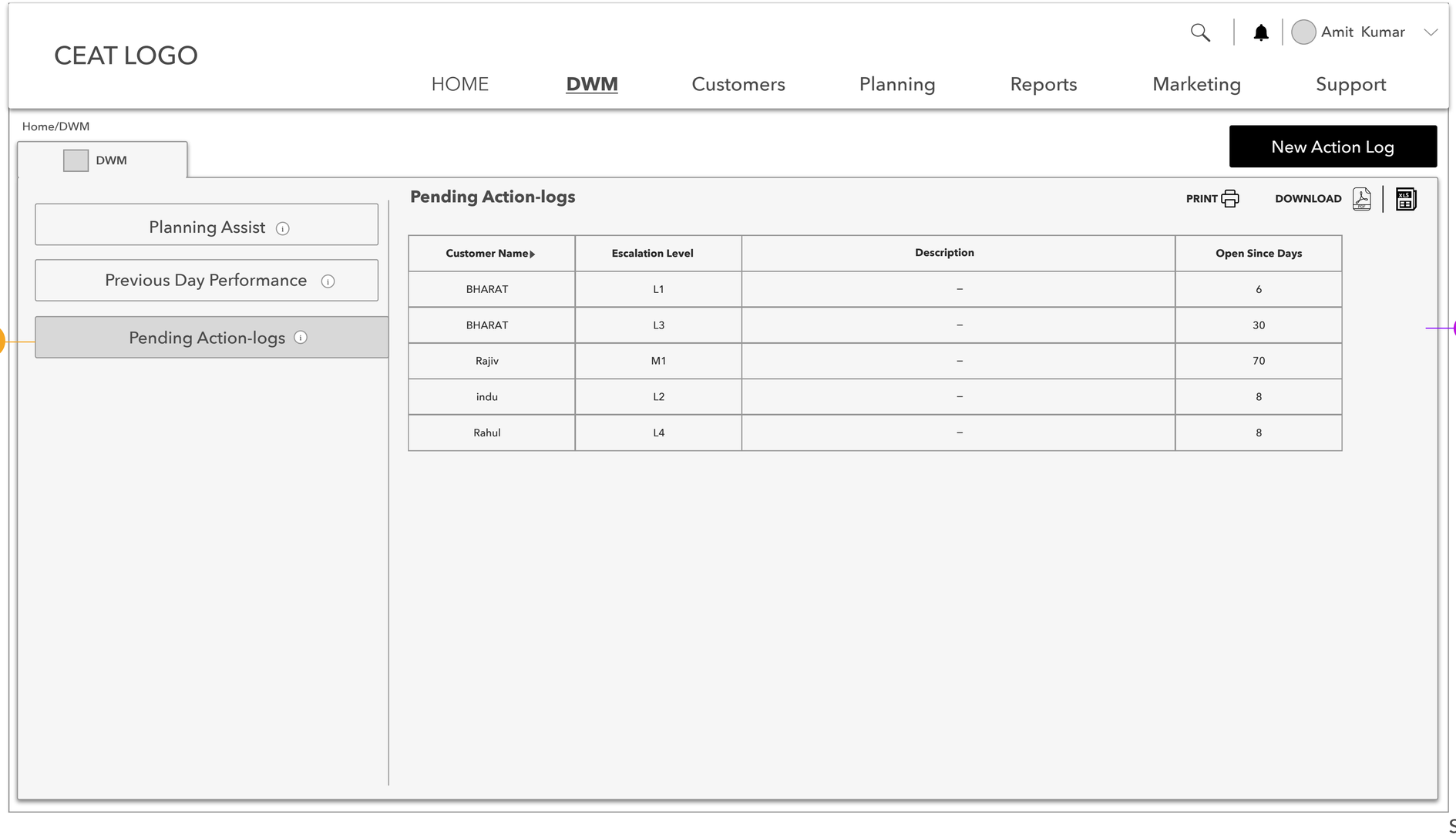
Annotations

1 Previous Day Performance

A Action Logs - List

Screen Break

Screen Resolution 1366×768



Customer Name	Escalation Level	Description	Open Since Days
BHARAT	L1	–	6
BHARAT	L3	–	30
Rajiv	M1	–	70
indu	L2	–	8
Rahul	L4	–	8

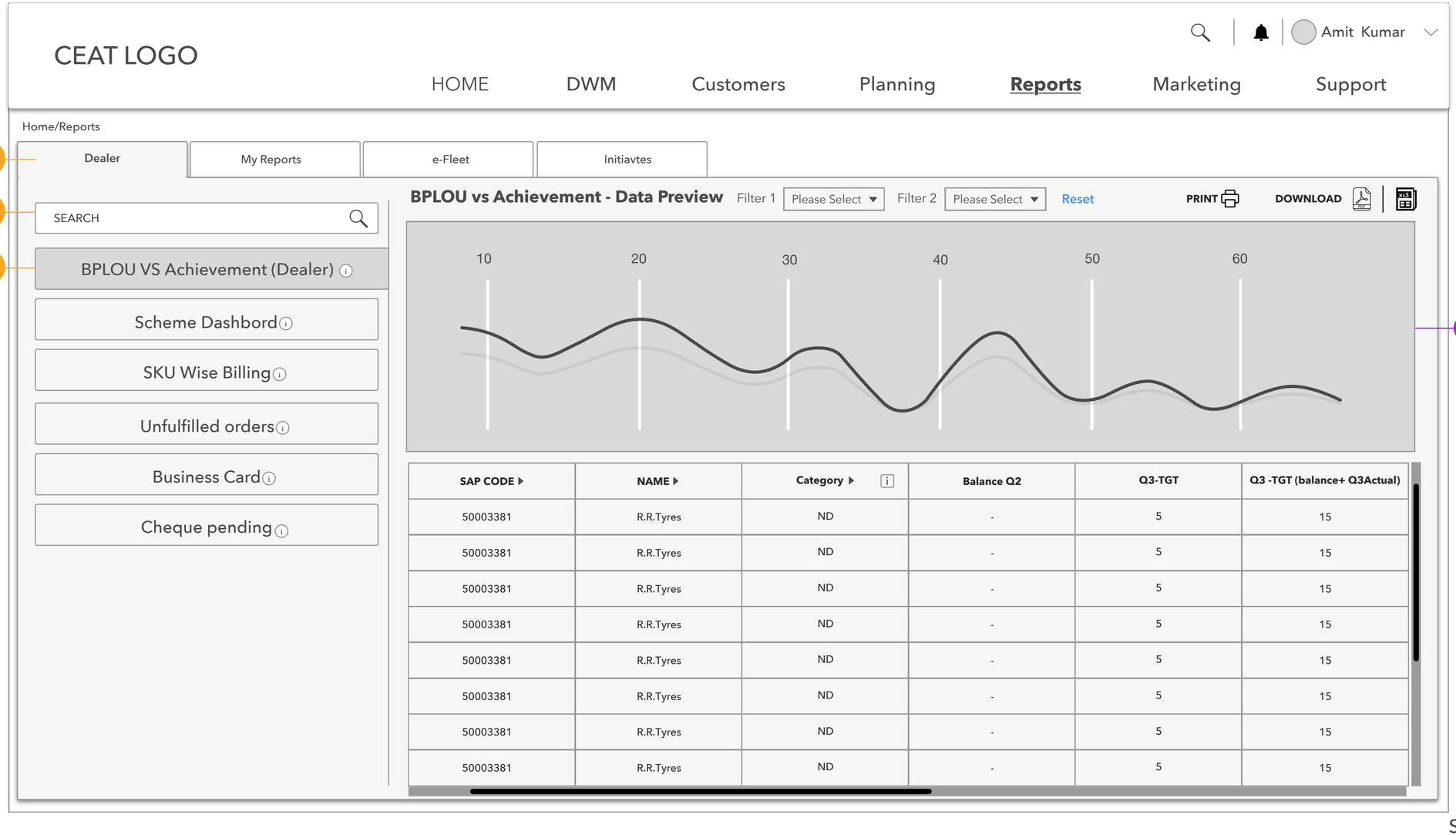
Annotations

1 Pending Action-logs

A List

Screen Break

Screen Resolution 1366×768



Screen Break

Annotations

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

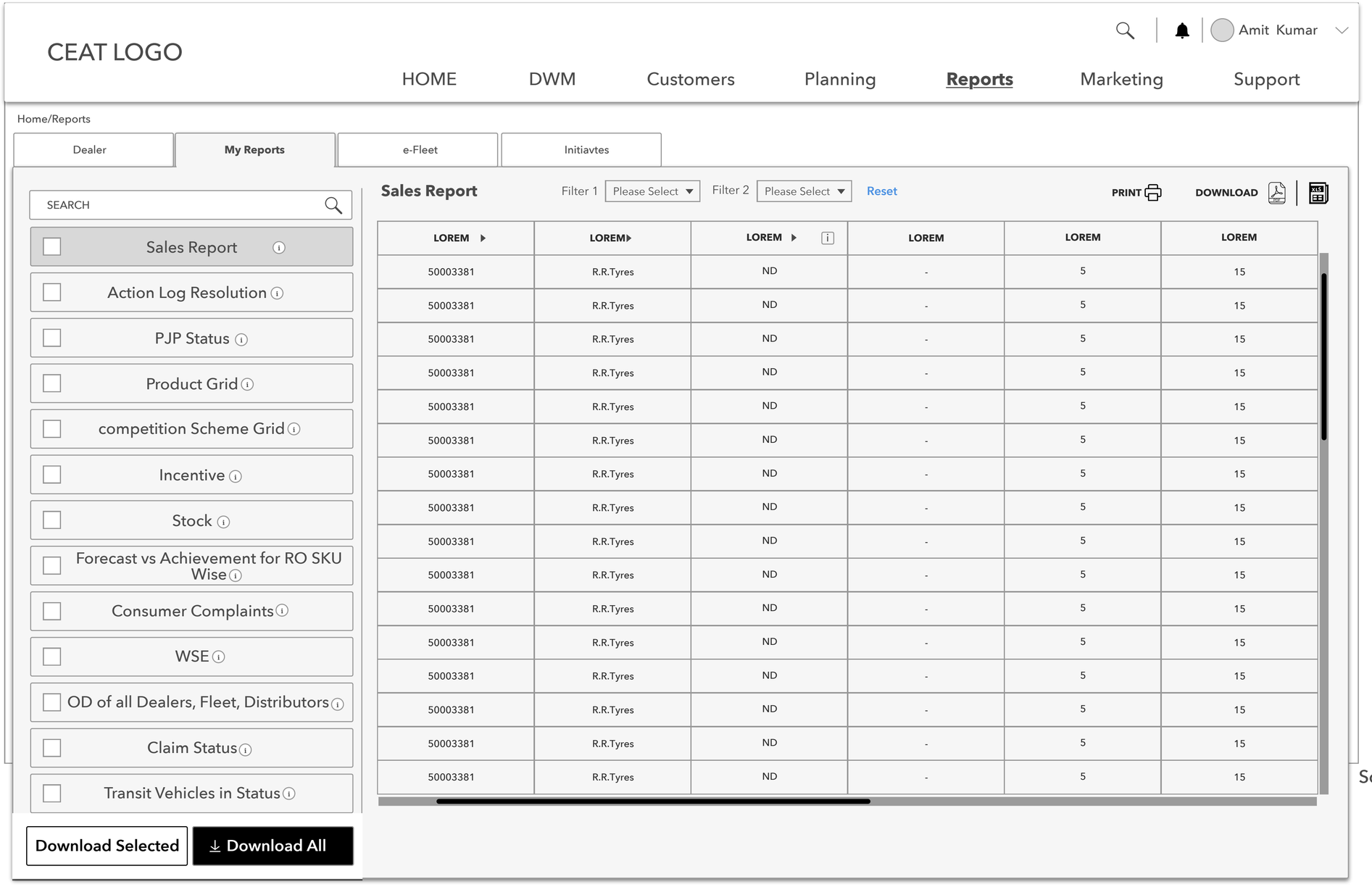
2 Dealer Report - Specific Search for each report in this category

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 Resolution 1366×768



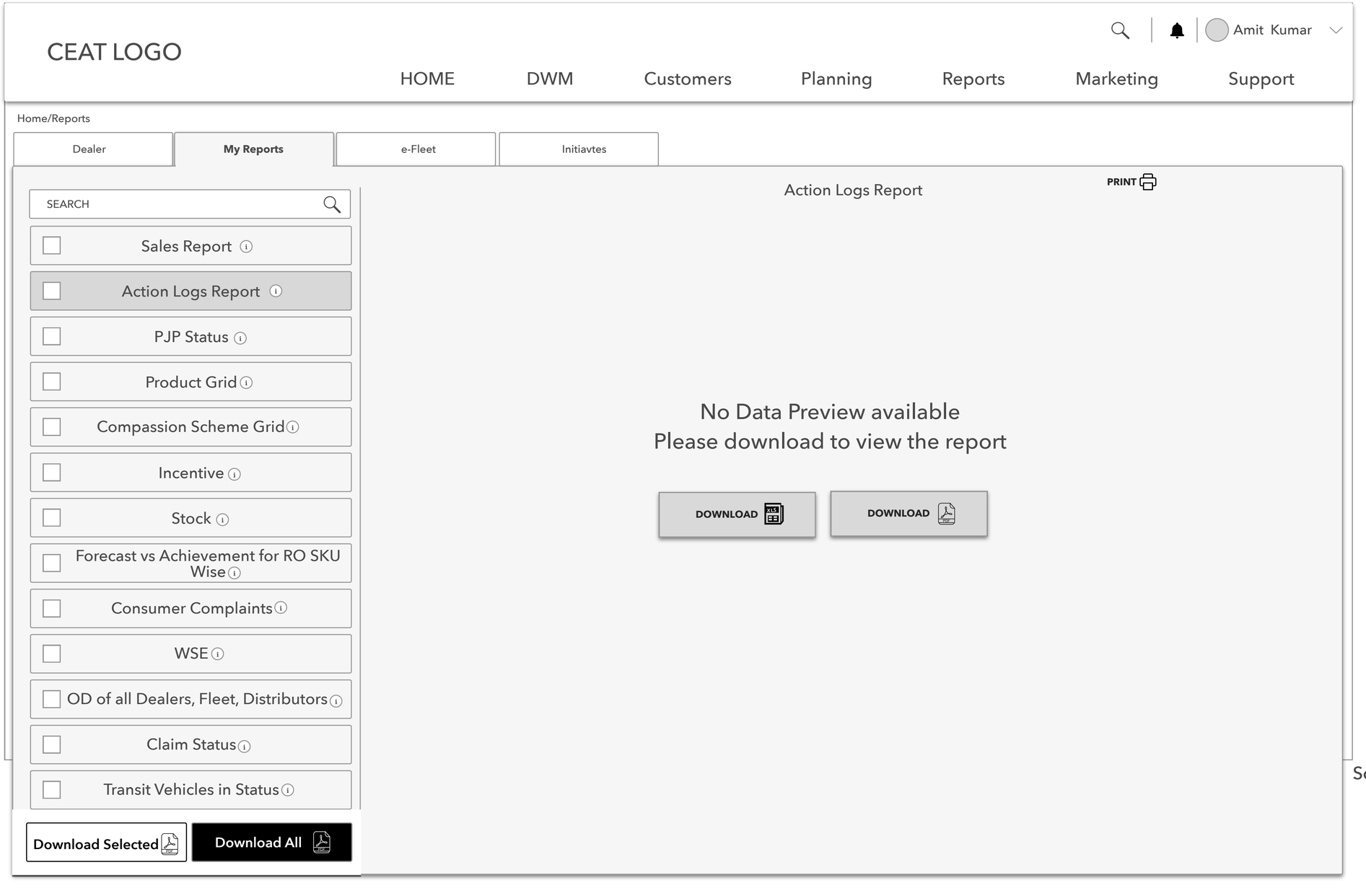
Screen Break

Annotations

1 My Report - View

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

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 | **e-Fleet** | 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

PRINT 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.

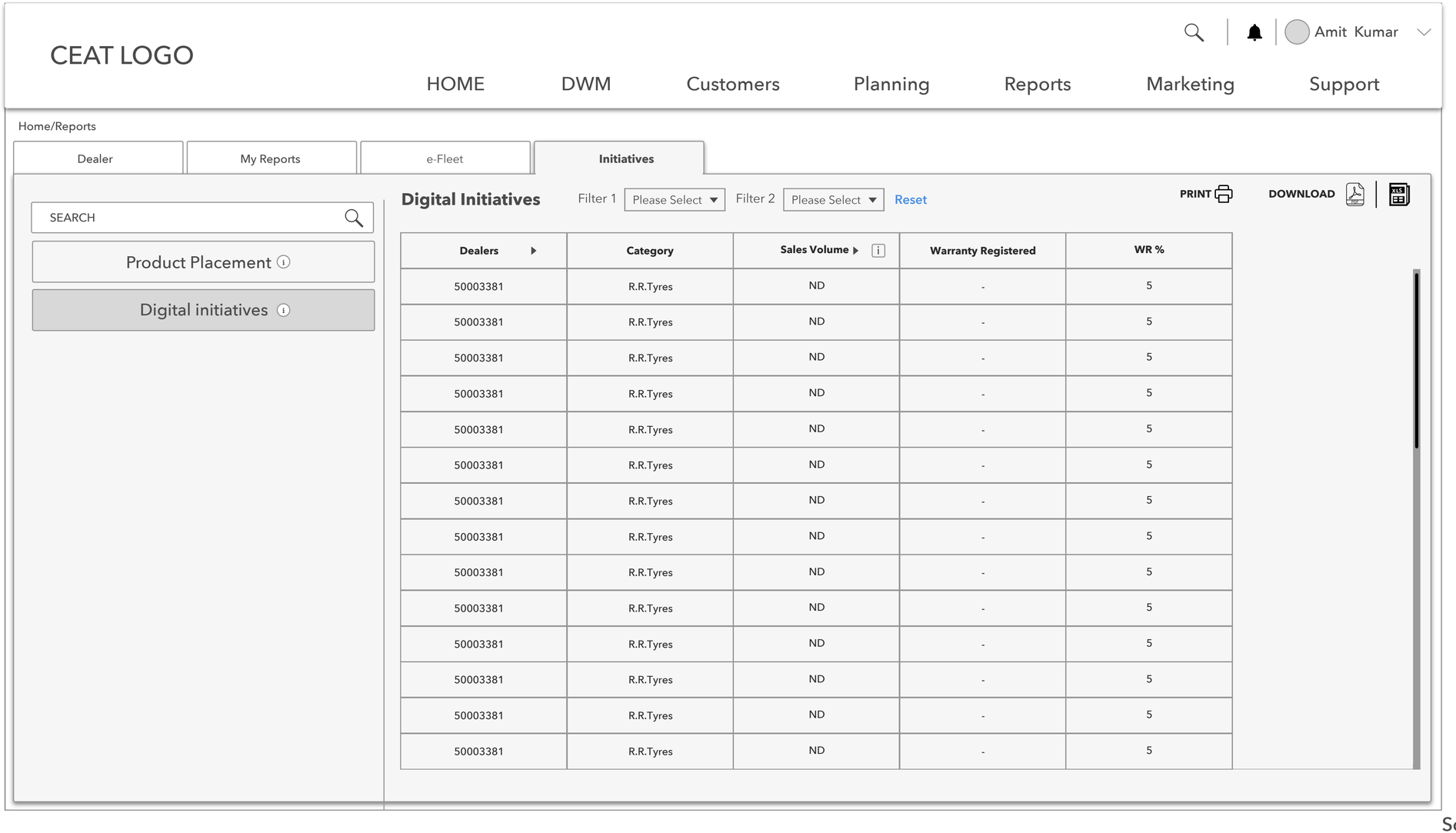
Filter 1: Customised

- 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



Screen Break

Annotations

1 Initiatives View
Limited columns view

Page Break
Customer Flow

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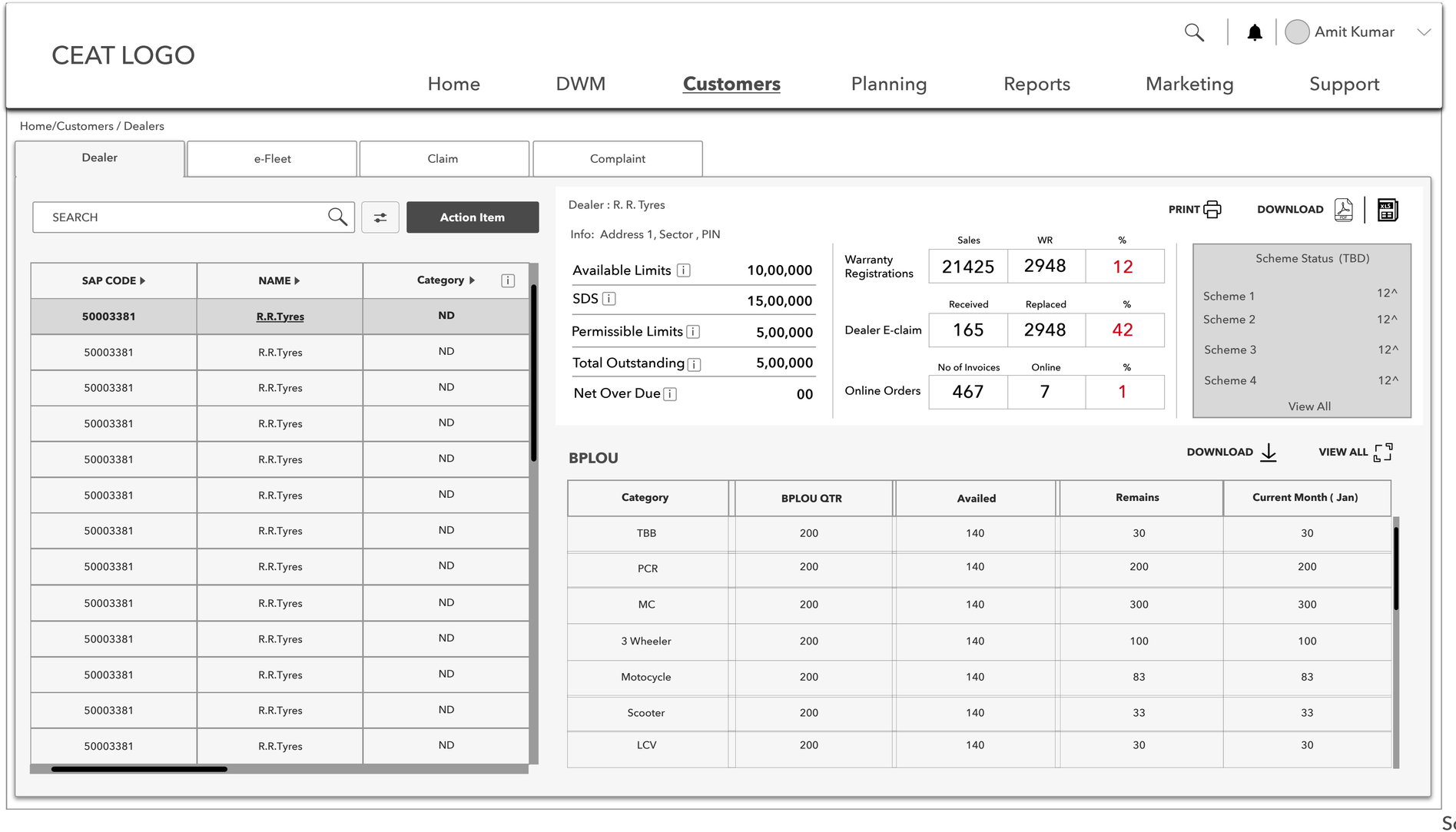
1.2.3 Territory Lead - Customers - Claim 20

Screen Resolution 1366×768



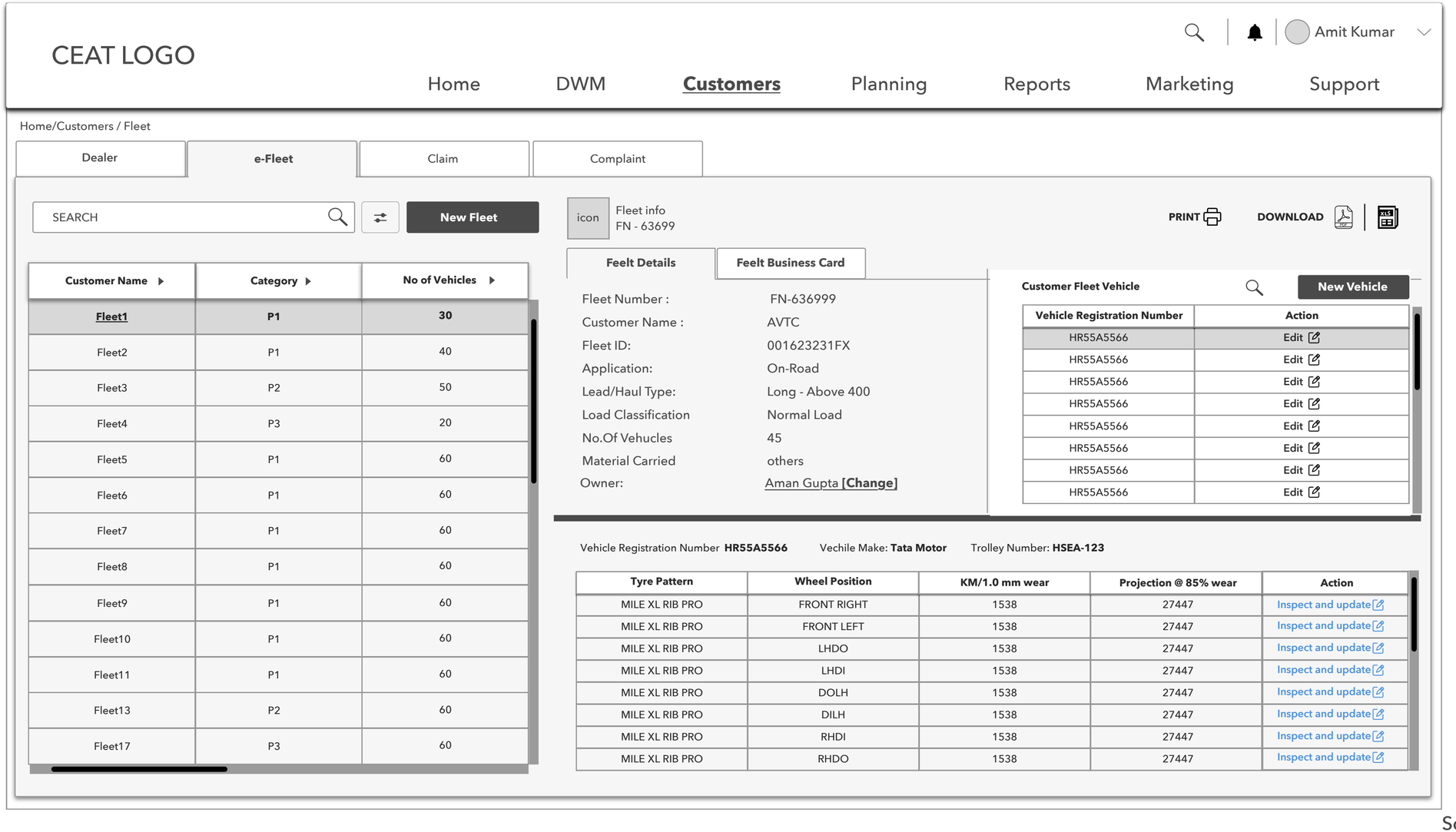
Screen Break

Annotations

1 Selected Dealer View

Info about the dealer, Warranty, Schemes & BPLOU

Screen Resolution 1366×768



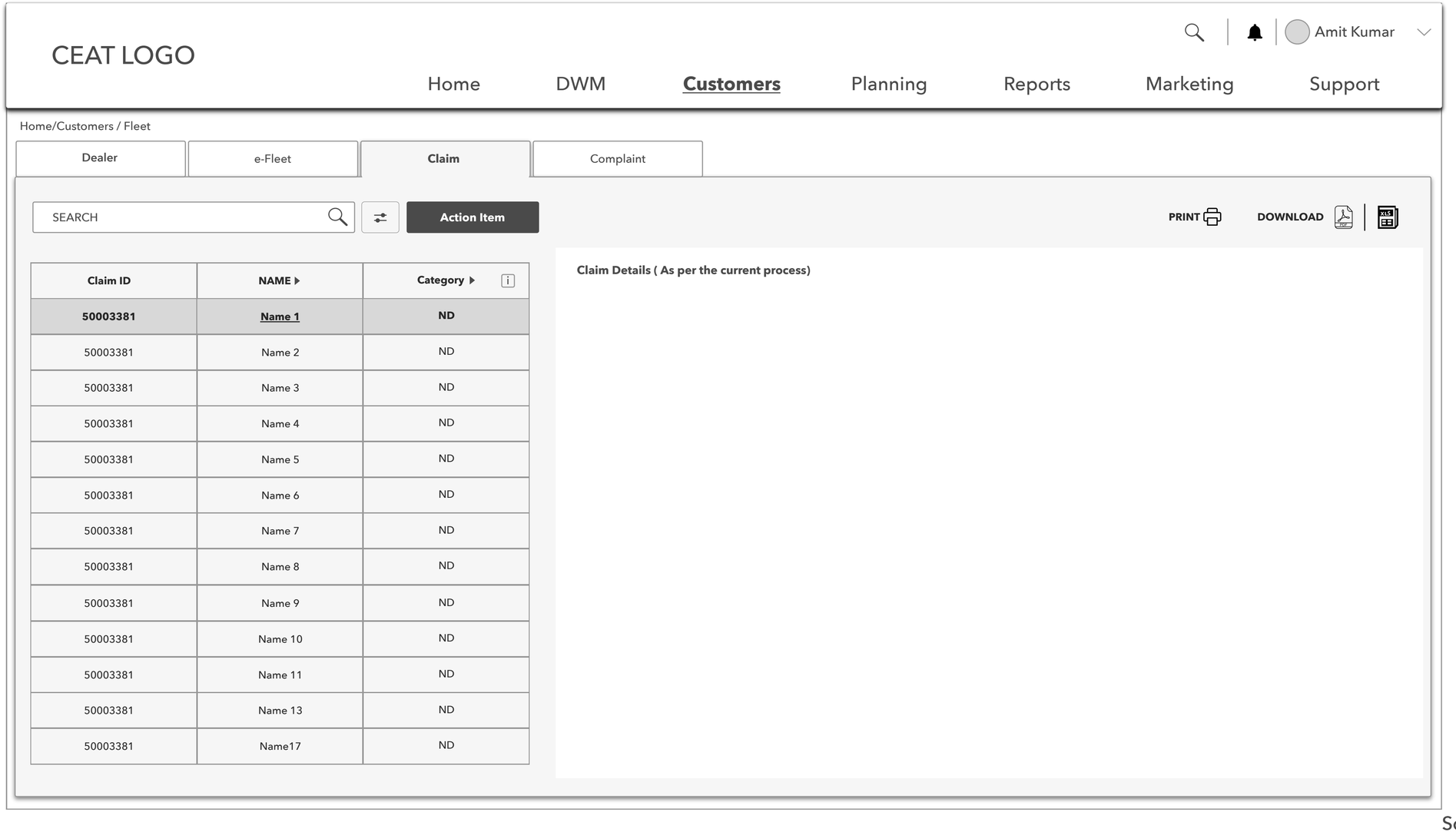
Screen Break

Annotations

1 Selected e-Fleet View

Info about the dealer, Warranty, Schemes & BPLOU

Screen Resolution 1366×768



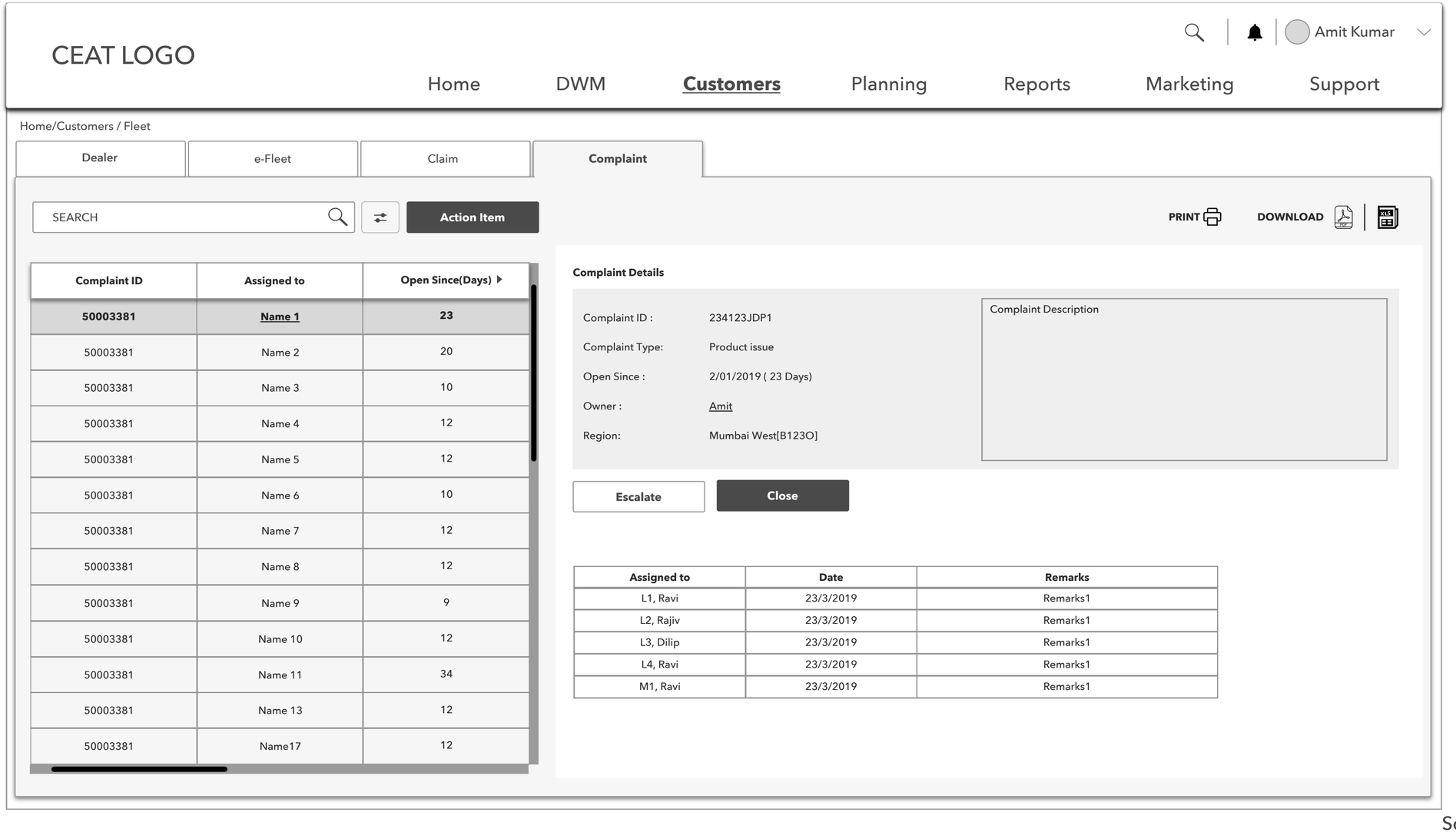
Screen Break

Annotations

1 Selected Claim View

- Claim detail to be as per the current system.

Screen Resolution 1366×768



Screen Break

Annotations

1 Selected Complaint View

Info about the dealer, Warranty, Schemes & BPLOU