CEAT Sales Forces Dashboard UX Document

Version. 01

Date: 11 January 2019

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Wireframe

1.0 - TL Interface ---

2.0 - TLD Interface ---

3.0 - RSM Interface ---

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

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 field

Dealer

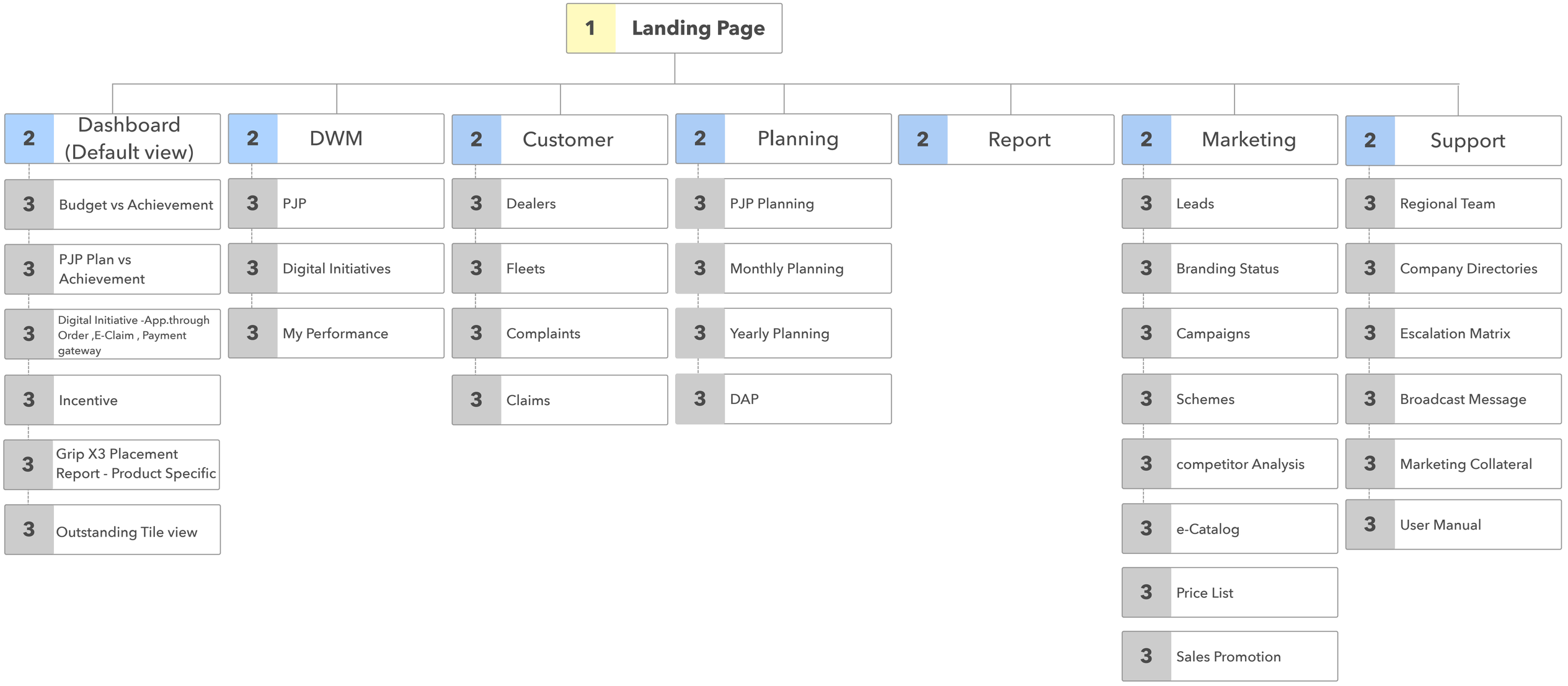
He visits each of the dealers as per his PJP and checks on-their status of business with payments, orders & Claims/ Complaints

Fleet

He visits each of the fleet and also sells the brand also check does the inspection on tyer heat

Leads & Consumer

He also goes to 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
3 Grip X3 Placement Report - Product Specific
3 Outstanding Tile view
2 DWM
3 PJP
3 Digital Initiatives
3 My Performance
2 Customer
3 Dealers
3 Fleets
3 Complaints
3 Claims
2 Planning
3 PJP Planning
3 Monthly Planning
3 Yearly Planning
3 DAP
2 Report
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

TLD

Sales Force Portal

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

TLD - 3 kinds of customers
- Distributors
– DSE
- Sub- Dealers
- Leads(Sub-dealers)

Daily Work Management

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

Customers

TLD - 3 kinds of customers
- Distributors
– DSE
- Sub- Dealers
- Leads(Sub-dealers)

Planning

TLD does a year & Monthly planning and based on this he defies 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 field

Distributor

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

DSE

DSE works under Distributor. TLD goes on beat with him to do similar task.

OEM

DSE or TLD visits OEM for orders.

Sub Dealers

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

Mechanics

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

- 1 Landing Page
  - 2 Dashboard (Default view)
    - 3 Run-rate (Category)
    - 3 Run-rate (value)(company to old and old to dt)
    - 3 LPD
    - 3 Check-in
    - 3 Outstanding Tile view
  - 2 DWM
    - 3 PJP
    - 3 Digital Initiatives
    - 3 My Performance
  - 2 Customer
    - 3 Distributors
    - 3 DSE
    - 3 Sub - Dealers
    - 3 OE Dealers
    - 3 Complaints
    - 3 Claims
  - 2 Planning
    - 3 PJP Planning
    - 3 Monthly Planning
    - 3 Yearly Planning
    - 3 DAP
  - 2 Report
  - 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

RSM

Sales Force Portal

Regional Service Manager will login to do their day to day task and reporting.

RSM - 3 kinds of customers
- Dealers
- OE Dealers
- Fleets
- Influencers

Daily Work Management

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

Customers

RSM - 3 kinds of customers
- Distributors
– DSE
- Sub- Dealers
- Leads(Sub-dealers)

Planning

RSM does a year & Monthly planning and based on this he defies 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 field

Dealer

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

OE Dealers

He visits each OE Dealers as per his PJP and check on-their status of business such as Targets, Payments, orders & claims/ complaints

Fleets

He visits each of the fleet and also sells the brand also check does the inspection on tyer.

Sitemap - Regional Service Manager

- 1 Landing Page
  - 2 Dashboard (Default view)
    - 3 Direct Fleet Plan vs Actuals (Every Month)
    - 3 Complaint TAT
    - 3 Incentive Tracker
    - 3 Dashboard Score
    - 3 Outstanding tile View
  - 2 DWM
    - 3 PJP
    - 3 Digital Initiatives
    - 3 My Performance
  - 2 Customer
    - 3 Dealer
    - 3 Fleets
    - 3 OE Dealers
    - 3 Complaints
    - 3 Claims
  - 2 Planning
    - 3 PJP Planning
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CEAT Sales Forces Dashboard - Territory Lead Wireframe

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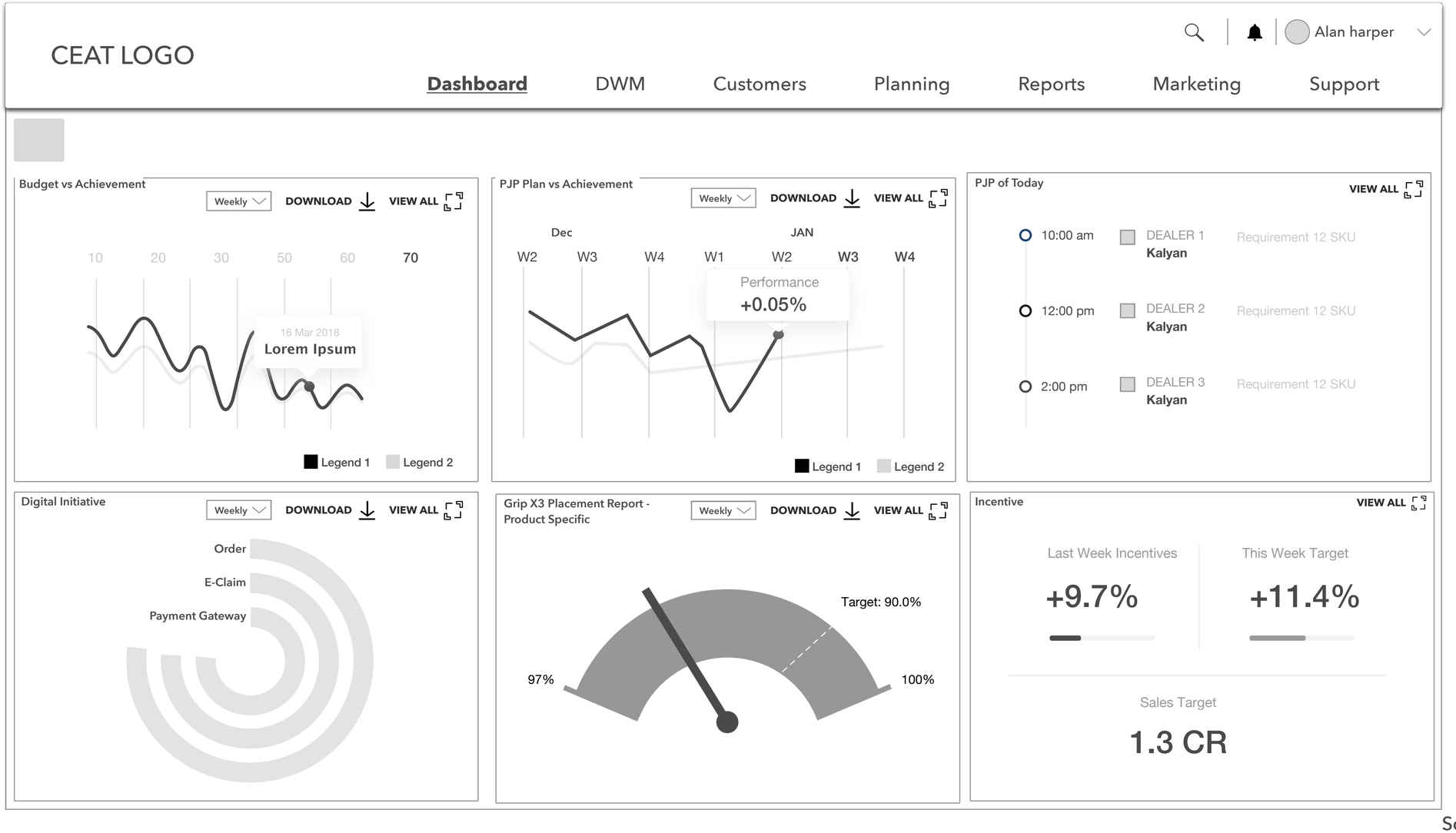
Wireframe

1.0.0 - Landing Page - Dashboard 02

1.0.1 - Sub- Navigation View 04

1.1.1 - DWM 06

Screen Resolution 1366×768



Annotations

1 Top Navigation as per sitemap

Screen Break