







Channel Partner Management/ Verification of CP- Provision Details

Approval for CP Provision Details

Associated Company / Customer Name TCS Pvt Ltd (P)		CP Name CP-Sachin P	Cert Type Cert/Non Cert  <small>If Cert, S1 S2 WO need to enter If Non Cert S2 WO Number Entered</small>	
S1 WO 1111	S2 WO 1113	Stage / Service Type CA1		Product ISO 9k
Address Bangalore		GST Number 29AZOPK, N/A		
MSME Number MSME78268	Assessment Fee 50,000	Delivered Month Dec 2022	SP Name Arpit SP 	
Incentive % 20%	Special Incentive Amount 0	Agreed Incentive % 10%		
Invoice Number 22/024	Invoice Date 19-02-2022 	Invoice Submitted by CP Yes/No	Date of Payment to CP - 	
Certification Type Cert / Non-Cert 		Verified Status Verified 		
Remarks All submitted				
Comments If Rejected, Comment mentioned.				
<div>ApproveReject</div>				

Channel Partner Management/ Verification of CP- Provision Details

Verify CP Provision Details**Associated Company /
Customer Name**

TCS Pvt Ltd (P)

CP Name

CP-Sachin P

Cert Type

Cert/Non Cert

If Cert, S1 S2 WO need to enter
If Non Cert S2 WO Number Entered

S1 WO

1111

S2 WO

1113

Stage / Service Type

CA1

Product

ISO 9k

Address

Bangalore

GST Number

29AZOPK, N/A

MSME Number

MSME78268

Assessment Fee

50,000

Delivered Month

Dec 2022

SP Name

Arpit SP

Incentive %

20%

Special Incentive Amount

0

Agreed Incentive %

10%

Invoice Number

22/024

Invoice Date

19-02-2022

**Invoice Submitted by CP**

Yes/No

Date of Payment to CP

-

**Certification Type**

Cert / Non-Cert

Verified Status

Verified

Remarks

All submitted

RBH Approver Name

RBH Head

Remarks

Agree for mentioned incentive.

Status

1. Verified
2. Not Verified/Yet To Verify
3. Sent For RBH Approval
4. RBH Approved
5. Paid
6. Not Paid
7. RBH Rejected

Verify

Created CP Provision Details for Payment

21-11-2022

21-11-2022

Create Invoice - Only Verified Items

No . of Items

7

Sl.No	Customer Type	Associated Comapany	Associated Contact Person	Segment	Certificate Type	DQS Contact Source	Lead Created By	Lead Created Date	City	State	Region	Regional Business Head	Validated By	Validated Date	Sales Person Name	Assigned By	Assigned Date	Status	Action
1	New	TCS Pvt Ltd	Ravi Ratnakar	MED	Cert	Recomendation Consultancy (Channel Partner)	CP-XYZ	25-11-2022	Pune	Maharastra	South - 1	Girish Siswal	-	-	-	-	-	Open	
2	Existing	ABB Pvt Ltd	Thilothaman	MSA	Non - Cert	Recomendation Consultancy (Channel Partner)	CP-XYZ	22-11-2022	Delhi	Delhi	North - 1	Sachin P	-	-	-	-	-	Open	
3	New	ABC Pvt Ltd	Roshni D	MSA	Cert	Recomendation Consultancy (Channel Partner)	CP-XYZ	21-11-2022	Bangalore	Karnataka	South - 1	Girish Siswal	Lead Admin Name	22-11-2022	Arpit SP	Lead Admin Name	25-11-2022	Assigned SP	
4	Existing	Sony Pvt Ltd	Kajal S	MSA	Cert	Recomendation Consultancy (Channel Partner)	CP-XYZ	16-11-2022	Kolkata	West Bengal	West	Jai Raj	Lead Admin Name	16-11-2022	-	-	-	Unqualified	
5	New	Laminaar India Ltd	Hemanth P	MED	Cert	Recomendation Consultancy (Channel Partner)	CP-XYZ	15-11-2022	Delhi	Delhi	North - 1	Sachin P	Lead Admin Name	16-11-2022	-	-	-	Validated	
6	New	Infosys Pvt Ltd	Sunil agrawal	MSA	Non - Cert	Recomendation Consultancy (Channel Partner)	CP-XYZ	12-11-2022	Bangalore	Karnataka	South - 1	Girish Siswal	Lead Admin Name	16-11-2022	-	-	-	Validated	
7	Existing	V3 Novus Pvt Ltd	Laxmi mittal	MSA	Cert	Recomendation Consultancy (Channel Partner)	CP-XYZ	08-11-2022	Bangalore	Karnataka	South - 1	Girish Siswal	-	-	-	-	-	Open	

Show Entries

Previous  3  Next

- 1.Cold Calling
- 2.Relationship Sales Manager
- 3.Recomendation Auditor
- 4.Recomendation Consultancy(Channel Partner)
- 5.DQS Customer Referral
- 6.Marketing Campaign
- 7.Event
- 8.Social Selling
- 9.DQS Employee Referral

Status Dropdown List			
Open	Validated	Assigned SP	Unqualified/ Lead Lost
Prospect	Account	Opportunity	
Sent to L1 Verify	L1 Verified	Sent to L2 Verify	L2 Verified
Quote Preparation	Sent S&M Approval		
Work order Creation	Advance Payment	Task order Creation	Audit clearance-Delivery
Invoice Creation	Payment clearance	Certificate Issued	

Lead Management

Lead Generation

Lead Validation

Lead Assignment

Lead Escalation

Lead Conversion

Prospects

Accounts

Opportunities

Lead Management/ Create New Lead**Create New Lead****Customer Details****Customer Type***☒ New☐ Existing Customer**Multiple Site Audit ***☒ Yes☐ No**Associated Comapany ***

TCS Pvt Ltd

Segment *

MSA

MSA

MED

Certificate Type *

Cert

Cert

Non-Cert

First Name *

Sachin P

Last Name ***Email ***

Sachin@gmail.com

Job Title *

Finance & Accounts

Street Address *

Anjaneya Tech Park

Address Line 2 *

5th Floor, Domalur

City *

Bangalore

State *

Karnataka

Country *

India

Postal Code *

560096

Region *

South -1

Regional Business Head *

Girish Siswal

Global Managing Director *

Dr.Murugan

Global Manager Sales *

Girish Siswal

Website URL

www.dqs.com

Phone number

08485285277

Mobile Phone number *

8778784654

**If multi site
available
need to
select
check Box****Lead Source Details****DQS Contact Source ***Recomendation
Consultancy(Channel Partner)**Lead Created By ***

CP-XYZ

Lead Created Date *

21-11-2022

**Requirement Details****Standard/Program/Assement ***

ISO 9000 Standard.

Remarks *

Proceed further.

**If Standard Not available in list, Mention in remarks to
add into list, Lead admin rise the request****Create Lead****Cancel**

Lead Management/ Create New Lead

Create New Lead

Customer Details

Customer Type*

☐ New

☒ Existing Customer

Multiple Site Audit *

☒ Yes

☐ No

Associated Comapany *

TCS Pvt Ltd (P)

BR Number

50001234

Do you want to Create New Location/Site - 50001234 *

☒ Yes

☐ No

Associated Comapany *

TCS Pvt Ltd (S1)

Segment *

MSA

MSA

MED

Certificate Type *

Cert

Cert

Non-Cert

First Name *

Sachin P

Last Name *

P

Email *

Sachin@gmail.com

Job Title *

Finance & Accounts

Street Address *

Anjaneya Tech Park

Address Line 2 *

5th Floor, Domalur

City *

Bangalore

State *

Karnataka

Country *

India

Postal Code *

560096

Region *

South -1

Regional Business Head *

Girish Siswal

Global Managing Director *

Dr.Murugan

Global Manager Sales *

Girish Siswal

Website URL *

www.dqs.com

Phone number

08485285277

Mobile Phone number *

8778784654

Lead Source Details

DQS Contact Source *

Recomendation

Consultancy(Channel Partner)

Lead Created By *

CP-XYZ

Lead Created Date *

21-11-2022

Requirement Details

Standard/Program/Assement *

ISO 9000 Standard.

Remarks *

Proceed further.

Lead Management
Lead Generation
Lead Validation
Lead Assignment
Lead Escalation
Lead Conversion
Prospects
Accounts
Opportunities

Lead Management/ Validate Lead Details

Validate Lead Details

Customer Details

Customer Type* <input checked="" type="radio"/> New <input type="radio"/> Existing Customer		Multiple Site Audit* <input checked="" type="radio"/> Yes <input type="radio"/> No	
Associated Comapany* TCS Pvt Ltd	Segment* MSA	Certificate Type* Cert	
First Name* Sachin P	Last Name* P	Email* Sachin@gmail.com	Job Title* Finance & Accounts
Street Address* Anjaneya Tech Park		Address Line 2* 5th Floor, Domalur	
City* Bangalore	State* Karnataka	Country* India	Postal Code* 560096
Region* South -1	Regional Business Head* Girish Siswal	Global Managing Director* Dr.Murugan	Global Manager Sales* Girish Siswal
Website URL* www.dqs.com	Phone number 08485285277	Mobile Phone number* 8778784654	

Lead Source Details

DQS Contact Source* Recomendation Consultancy(Channel Partner)	Lead Created By* CP-XYZ	Lead Created Date* 21-11-2022
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Requirement Details

Standard/Program/Assement* ISO 9000 Standard.	Remarks* Proceed further.
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Lead Validation

Remarks* All Information are clear.	Validated By* Lead Admin	Lead Validated Date* 21-11-2022
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Lead Management
Lead Generation
Lead Validation
Lead Assignment
Lead Escalation
Lead Conversion
Prospects
Accounts
Opportunities

Lead Management/ Validate Lead Details

Validate Lead Details

Customer Details

Customer Type* <input checked="" type="radio"/> New <input type="radio"/> Existing Customer		Multiple Site Audit * <input checked="" type="radio"/> Yes <input type="radio"/> No	
Associated Comapany * <div>TCS Pvt Ltd</div>	Segment * <div>MSA</div>	Certificate Type * <div>Cert</div>	
First Name * <div>Sachin P</div>	Last Name * <div>P</div>	Email * <div>Sachin@gmail.com</div>	Job Title * <div>Finance & Accounts</div>
Street Address * <div>Anjaneya Tech Park</div>		Address Line 2 * <div>5th Floor, Domalur</div>	
City * <div>Bangalore</div>	State * <div>Karnataka</div>	Country * <div>India</div>	Postal Code * <div>560096</div>
Region * <div>South -1</div>	Regional Business Head * <div>Girish Siswal</div>	Global Managing Director * <div>Dr.Murugan</div>	Global Manager Sales * <div>Girish Siswal</div>
Website URL * <div>www.dqs.com</div>	Phone number <div>08485285277</div>	Mobile Phone number * <div>8778784654</div>	

Lead Source Details

DQS Contact Source * <div>Recomendation Consultancy(Channel Partner)</div>	Lead Created By * <div>CP-XYZ</div>	Lead Created Date * <div>21-11-2022</div>
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Requirement Details

Standard/Program/Assement * <div>ISO 9000 Standard.</div>	Remarks * <div>Proceed further.</div>
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Lead Validation

Stage * <div>Assigned to SP</div> <div>Assigned to SP Rejected</div>	Contact Owner * <div>Arpit SP</div> <div>Get it From CP Registration Form</div>	Validated By* <div>Lead Admin</div>	Lead Validated Date * <div>21-11-2022</div>
Remarks * <div>All Information are clear.</div>			