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### BASELINE & REPORT

#### Baseline

##### Daily Baseline

* **Purpose:**
* To complete pending transaction data which has create date in today – N days
* Copy complete transaction data which has create date in today – N days to baseline database
* Report has baseline data will get data form this database
* **Pre-condition:**
* Configure N days in system to run daily baseline tool
* Pending transaction data: sales order has status = open in DMS-Core
* Complete transaction data: A/R invoice in DMS-Core
* **Post-condition:**
* Sell-out data will be copy on baseline database
* **Business Requirements:**
* Set up N (3) days and time = 22:00 PM for daily baseline tool process baseline daily
  + Pending transaction data: cancel pending transaction data which has create date in today – 3 with reason = “Over time processing for close date”
  + Complete transaction data: Copy complete transaction data which has create date in today – 3 to baseline database
* **Process flow chart:**



* **Details of Steps taken:**

| **Process Step** | **Executor** | **Description** |
| --- | --- | --- |
| **Step 1:** Process un-completed transaction data has date = today – N days | Branch/Sub Distributor | ***Input***   * un-completed transaction data has date = today – N days   ***Process***  For branch do nothing  For sub distributor   * Salesman check and process un-complete transaction on SFA, go to **step 2.1** * if salesman can’t do it by their self, go to **step 2.2** |
| **Step 2.1:** Completed transaction data has date = today – N days | Branch/Sub Distributor | ***Input***   * un-completed transaction data has date = today – N days   ***Process***  For branch do nothing  For sub distributor   * Salesman check and process un-complete transaction on SFA   ***Output***   * Complete transaction data |
| **Step 2.2:** Contact support center to get supporting | Branch/Sub Distributor | ***Input***   * un-completed transaction data has date = today – N days   ***Process***  For branch do nothing  For sub distributor   * Salesman check and process un-complete transaction on SFA   ***Output***   * Complete transaction data |

##### Monthly Baseline

* **Purpose:**
* To complete pending transaction data in month
* Copy complete transaction data in month to baseline database
* Close month
* **Pre-condition:**
* Configure the date of month in system to run monthly baseline tool
* Pending transaction data: sales order has status = open in DMS-Core
* Complete transaction data: A/R invoice in DMS-Core
* **Post-condition:**
* Sell-out data will be copy on baseline database
* **Business Requirements:**
* Set up 7th of month and time = 22:00 PM for monthly baseline tool process baseline monthly
  + Pending transaction data: cancel pending transaction data in month with reason = “Over time processing for close month”
  + Complete transaction data: Copy complete transaction data in month to baseline database
* **Process flow chart:**



* **Details of Steps taken:**

| **Process Step** | **Executor** | **Description** |
| --- | --- | --- |
| **Step 1:** Confirm new close date | Sales Admin | When HO want to change the date of close month |
| **Step 2:** Set up new close date | Sales Admin | ***Input***   * New close date   ***Process***   * Sales Admin update new close date on core-DMS   ***Output***   * New close date on system |
| **Step 3:** Process un-completed transaction data in this month | Branch/Sub Distributor | ***Input***   * un-completed transaction data in this month   ***Process***  For branch do nothing  For sub distributor   * Salesman check and process un-complete transaction on SFA, go to **step 4.1**   if salesman can’t do it by their self, go to **step 4.2** |
| **Step 4.1:** Completed transaction in this month | Branch/Sub Distributor | ***Input***   * un-completed transaction data in this month   ***Process***  For branch do nothing  For sub distributor   * Salesman check and process un-complete transaction on SFA   ***Output***   * Complete transaction data |
| **Step 4.2:** Contact support center to get supporting | Branch/Sub Distributor | ***Input***   * un-completed transaction data in this month   ***Process***  For branch do nothing  For sub distributor   * Salesman check and process un-complete transaction on SFA   ***Output***   * Complete transaction data |

##### Auto Job and Baseline Database

* **Transaction data of March :**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Company | SO Number | SO Date | SO Volume | SO Revenue | Invoice Number | Invoice Date | Invoice Volume | Invoice Revenue |
| Branch 01 | SO001 | 17/03/2017 | 20 | 20 $ |  |  |  |  |
| Branch 01 | SO002 | 20/03/2017 | 30 | 30 $ | IN002 | 24/03/2017 | 20 | 20 $ |
| Branch 01 | SO003 | 30/03/2017 | 20 | 20 $ | IN003 | 02/04/2017 | 40 | 40 $ |
| Sub 01 | SO004 | 17/03/2017 | 20 | 20 $ | IN004 | 17/03/2017 | 20 | 20 $ |
| Sub 01 | SO005 | 20/03/2017 | 30 | 30 $ | IN005 |  |  |  |
| Sub 01 | SO006 | 30/03/2017 | 20 | 20 $ | IN006 | 30/03/2017 | 40 | 40 $ |

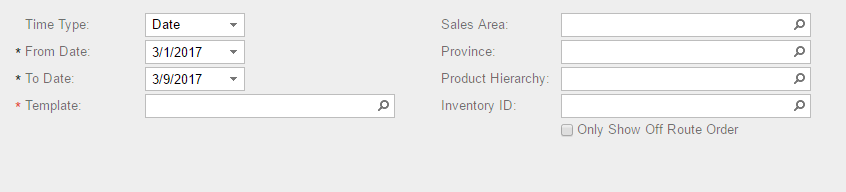
* **Daily baseline:** cancel pending transaction data and copy complete transaction data to database baseline

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Company | SO Number | SO Date | SO Volume | SO Revenue | Invoice Number | Invoice Date | Invoice Volume | Invoice Revenue |
| ~~Branch 01~~ | ~~SO001~~ | ~~17/03/2017~~ | ~~20~~ | ~~20 $~~ |  |  |  |  |
| Branch 01 | SO002 | 20/03/2017 | 30 | 30 $ | IN002 | 24/03/2017 | 20 | 20 $ |
| Branch 01 | SO003 | 30/03/2017 | 20 | 20 $ | IN003 | 02/04/2017 | 40 | 40 $ |
| Sub 01 | SO004 | 17/03/2017 | 20 | 20 $ | IN004 | 17/03/2017 | 20 | 20 $ |
| ~~Sub 01~~ | ~~SO005~~ | ~~20/03/2017~~ | ~~30~~ | ~~30 $~~ | ~~IN005~~ |  |  |  |
| Sub 01 | SO006 | 30/03/2017 | 20 | 20 $ | IN006 | 30/03/2017 | 40 | 40 $ |

* **Monthly baseline:** Close this month and user can’t input transaction data anymore
* **Baseline Report Simulation**
* **To date = 20/03/2017**: volume = 40 and revenue = 40 $
* **This month = Mar-2017**: volume = 120 and revenue = 120 $
* **From Date = 01/04/2017:** volume = 0 and revenue = 0 $

#### Report Overview

##### Report’s Parameters



* + **Time Type:** view report by date (from date – to date), week, month, quarter, year

|  |  |
| --- | --- |
| **Time Type** | **Description** |
|  | Choose from date – to date to view report |
|  | Choose week to view report |
|  | Choose month to view report |
|  | Choose quarter to view report |
|  | Choose year to view report |

* + **Sales Area:** GTM / MTM 🡪 NSD 🡪 RSM 🡪 ASM
* **GTM / MTM – General Trade Manager / Modern Trade** Manager: view all the GT/MT data, can view by country/region/area by choosing sales area
* **NSD - National Sales Director:** view all the nation data, can view by region/area by choosing sales area
* **RSM - Regional Sales Manager:** view in-charge region data, can view by area which belongs to in-charge region
* **ASM – Area Sales Manager:** view in-charge area data
  + **Province:** view report by province (geographical)
  + **Product hierarchy:** view report by category 🡪 sub-category 🡪 brand
  + **Inventory ID:** view report by product
  + **Template:**
  + One report can be customized to more report template base on purpose of viewers
  + Report template is created by admin, and can be customized base on viewers request
  + Choose the right report template to view
* **Note:** base on range of viewing report, data can be limited by filtered conditions

##### Viewing Report’s Functions

* **View report:** view report with chosen parameters
* **Save report template:** admin can create/update report template
* **Delete report template:** admin can delete report template which is not useful or delete wrong report template

##### Report’s Data Type

* **Real-time data:** report shows real-time data at the time viewing report, including pending transactions
* **Baseline data:** report shows baseline data. This is a tracking/analyzing/assessing data base on processed transactions

#### Inventory Reports

* **Purpose:**
  + Tracking inventory of sub distributor in period
* **Business Requirements:**
  + Data in report: real time
  + Filter data: From date – To Date
  + Decentralize data view base on user’s role
  + Decentralize by Salesforce: data of country/region just can be seen by manager of that country/region
* **Report Data**

| **Column Name** | **Description** | **Formula** | **Sample Data** |
| --- | --- | --- | --- |
| Country | Country of SD |  | Myanmar |
| Region | Region of SD |  | North |
| Area | Area of SD |  | North 01 |
| SD Code | SD Code |  | SD01 |
| SD Name | SD Name |  | Sub-Distributor 01 |
| Warehouse Code | Warehouse Code |  | WH01 |
| Warehouse Name | Branch/SD Name |  | Warehouse 01 |
| Product Code | Product Code |  | PRO01 |
| Product Name | Product Name |  | Product 01 |
| Begin Stock | Begin stock of product | = End stock of last month + receipt transaction - issue transaction  Receipt/Issue transaction has date < from date of parameter | 50 |
| Receipt | Sub distributor has purchased from Branch or Increase adjustment | = Total quantity of A/R invoice from branch  Or Increase adjustment document | 30 |
| Issue | Sub distributor has sold out for customer or decrease adjustment | = Total quantity of A/R invoice to customer  Or decrease adjustment document | 20 |
| End Stock | End stock of product | = Begin Stock + Receipt – issue | 60 |

* **Sample Report**

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Country** | **Region** | **Area** | **SD Name** | **Warehouse** | **Product name** | **Begin Stock** | **Receipt** | | **Issue** | | **End Stock** |
| **Receipt from vendor** | **Increase Adjust** | **Issue to customer** | **Decrease Adjust** |
| Myanmar | North | North 01 | Sub-Distributor 01 | WH 01 | Product 01 | 50 | 30 | 2 | 20 | 1 | 61 |
| WH 01 | Product 02 | 50 | 40 | 2 | 20 | 1 | 71 |
| WH 01 | Product 01 | 50 | 30 |  | 40 |  | 40 |
| North 02 | Sub-Distributor 02 | WH 02 | Product 02 | 50 | 50 |  | 20 |  | 80 |
| WH 02 | Product 03 | 60 | 30 |  | 20 |  | 70 |

#### Sales Report

* **Purpose:**
  + Tracking sales report about orders, revenue, volume
* **Business Requirements:**
  + Data in report: Baseline
  + Filter data: From date – To date
  + Decentralize data view base on user’s role
  + Decentralize by Salesforce: data of channel/country/region/area just can be seen by manager of that channel/country/region/area
* **Report Data:**

| **Column Name** | **Description** | **Formula** | **Sample Data** |
| --- | --- | --- | --- |
| Country | Country of Branch/SD |  | Myanmar |
| Region | Region of Branch/SD |  | North |
| Area | Area of Branch/SD |  | North 01 |
| Branch/SD Code | Branch/SD Code |  | SD01 |
| Branch/SD Name | Branch/SD Name |  | Sub-Distributor 01 |
| Route Code | Route Code |  | R0001 |
| Salesman | Salesman |  | Salesman 01 |
| Customer Code | Customer Code |  | CUST01 |
| Customer Name | Customer Name |  | Customer 01 |
| Date | Date of Invoice |  | 3/8/2017 |
| Invoice | Invoice |  | IN000001 |
| Product Code | Product Code |  | PRO01 |
| Product Name | Product Name |  | Product 01 |
| Quantity | Quantity of A/R invoice |  | 15 |
| Amount | Amount of A/R invoice |  | 105,000 |

* **Note:** Quantity and amount of product in promotion program is not counted in this report

##### Sales Order Template Report

* **Sample Report:**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Country** | **Region** | **Area** | **Branch/SD Name** | **Route Code** | **Salesman** | **Customer Code** | **Customer Name** | **Delivery Note** | **Reference No.** | **Date** | **Invoice** | **Product name** | **Quantity** | **Amount** |
| Myanmar | North | North 01 | Sub-Distributor 01 | R0001 | Salesman 01 | CUST01 | Customer 01 |  |  | 3/8/2017 | IN000001 | Product 01 | 4 | 32,000 |
| R0001 | Salesman 01 | CUST01 | Customer 01 |  |  | 3/8/2017 | IN000001 | Product 02 | 15 | 105,000 |
| R0001 | Salesman 01 | CUST02 | Customer 02 |  |  | 3/8/2017 | IN000002 | Product 01 | 22 | 176,000 |
| North 02 | Sub-Distributor 02 | R0002 | Salesman 02 | CUST03 | Customer 03 |  |  | 3/8/2017 | IN000003 | Product 02 | 17 | 119,000 |
| R0002 | Salesman 02 | CUST03 | Customer 03 |  |  | 3/8/2017 | IN000004 | Product 03 | 30 | 180,000 |

##### Sales Revenue Template Report

* **Sample Report:**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Country** | **Region** | **Area** | **Branch/SD Name** | **Salesman** | **3/8/2017** | **3/9/2017** | **3/10/2017** | **Total** |
| Myanmar | North | North 01 | Sub-Distributor 01 | Salesman 01 | 32,000 | 36,800 | 34,960 | 103,760 |
| Salesman 02 | 105,000 | 120,750 | 114,713 | 340,463 |
| Salesman 03 | 176,000 | 202,400 | 192,280 | 570,680 |
| **Sub-Distributor 01 TOTAL** | | **313,000** | **359,950** | **341,953** | **1,014,903** |

##### Sales Volume Template Report

* **Sample Report:**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Country** | **Region** | **Area** | **Branch/SD Code** | **Branch/SD Name** | **Salesman** | **Product Code** | **Product name** | **Quantity** |
| Myanmar | North | North 01 | SD01 | Sub-Distributor 01 | Salesman 01 | PRO01 | Product 01 | 4 |
| Salesman 01 | PRO02 | Product 02 | 15 |
| Salesman 02 | PRO01 | Product 01 | 22 |
| Salesman 02 | PRO02 | Product 02 | 17 |
| Salesman 02 | PRO03 | Product 03 | 30 |

#### Sales KPIs Report

* **Purpose:**
  + Tracking sales KPIs execution
* **Business Requirements:**
  + Data in report: Baseline
  + Filter data: KPIs cycle
  + Decentralize data view base on user’s role
  + Decentralize by Salesforce: data of channel/country/region/area just can be seen by manager of that channel/country/region/area
* **Report Data:**

| **Column Name** | **Description** | **Formula** | **Sample Data** |
| --- | --- | --- | --- |
| Country | Country of salesman |  | Myanmar |
| Region | Region of salesman |  | North |
| Area | Area of salesman |  | North 01 |
| Salesman | Salesman |  | Salesman 01 |
| Target | Target of KPI |  | 5 |
| Actual | Actual execution |  | 3 |
| % | Percent of actual execution on target | = ( Actual / Target ) \* 100% | 60% |

* **Sample Report:**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Country** | **Region** | **Area** | **Salesman** | **KPIs 01** | | | **KPIs 02** | | |
| **Target** | **Actual** | **%** | **Target** | **Actual** | **%** |
| Myanmar | North | North 01 | Salesman 01 | 5 | 3 | 60% | 8 | 3 | 38% |
| Salesman 02 | 12 | 8 | 67% | 12 | 9 | 75% |
| Salesman 03 | 9 | 4 | 44% | 14 | 4 | 29% |
| North 02 | Salesman 04 | 15 | 5 | 33% | 9 | 5 | 56% |
| Salesman 05 | 20 | 11 | 55% | 26 | 11 | 42% |

#### Promotion Report

* **Purpose:**
  + Tracking promotion program execution
* **Business Requirements:**
  + Data in report: Baseline
  + Filter data: Program, From date – To date
  + Decentralize data view base on user’s role
  + Decentralize by Salesforce: data of channel/country/region/area just can be seen by manager of that channel/country/region/area
* **Report Data:**

| **Column Name** | **Description** | **Formula** | **Sample Data** |
| --- | --- | --- | --- |
| Country | Country of Branch/SD |  | Myanmar |
| Region | Region of Branch/SD |  | North |
| Area | Area of Branch/SD |  | North 01 |
| Branch/SD Code | Branch/SD Code |  | SD01 |
| Branch/SD Name | Branch/SD Name |  | Sub-Distributor 01 |
| Product Code | Product Code |  | PRO01 |
| Product Name | Product Name |  | Product 01 |
| Promotion Code | Promotion Code |  | P01 |
| Start Date | Start date of promotion |  | 3/8/2017 |
| End Date | End date of promotion |  | 4/8/2017 |
| Promotion Quantity | Quantity of product of promotion |  | 5 |
| Promotion Amount | Amount of product of promotion |  | 0 |

* **Sample Report:**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Country** | **Region** | **Area** | **Branch/SD Name** | **Product Name** | **Promotion Code** | **Start Date** | **End Date** | **Promotion Quantity** | **Promotion Amount** |
| Myanmar | North | North 01 | Sub-Distributor 01 | Product 01 | P01 | 3/8/2017 | 4/8/2017 | 5 | 0 |
| Product 02 | P02 | 3/8/2017 | 4/8/2017 | 4 | 0 |
| Product 03 | P01 | 3/8/2017 | 4/8/2017 | 2 | 0 |
| North 02 | Sub-Distributor 02 | Product 03 | P01 | 3/8/2017 | 4/8/2017 | 3 | 0 |
| Product 02 | P02 | 3/8/2017 | 4/8/2017 | 2 | 0 |

#### Accumulation Report

* **Purpose:**
  + Tracking accumulation program execution
* **Business Requirements:**
  + Data in report: Baseline
  + Filter data: Program
  + Decentralize data view base on user’s role
  + Decentralize by Salesforce: data of channel/country/region/area just can be seen by manager of that channel/country/region/area
* **Report Data:**

| **Column Name** | **Description** | **Formula** | **Sample Data** |
| --- | --- | --- | --- |
| Country | Country of Branch/SD |  | Myanmar |
| Region | Region of Branch/SD |  | North |
| Area | Area of Branch/SD |  | North 01 |
| Branch/SD Code | Branch/SD Code |  | SD01 |
| Branch/SD Name | Branch/SD Name |  | Sub-Distributor 01 |
| Salesman Code | Salesman Code |  | SM01 |
| Salesman Name | Salesman Name |  | Salesman 01 |
| Customer Code | Customer Name |  | C001 |
| Customer Name | Customer Name |  | Customer 01 |
| Program | Accumulation Program |  | ACC01 |
| Register Start Date | Start register program date |  | 3/9/2017 |
| Register End Date | End register program date |  | 3/15/2017 |
| Execute Start Date | Start execute program date |  | 3/1/2017 |
| Execute End Date | End execute program date |  | 3/31/2017 |
| Level Register | Level customer registered |  | 1 |
| Amount Register | Amount base on level registered |  | 50,000 |
| Accumulated | Accumulated turnover from execute start date to now |  | 35,000 |

* **Sample Report:**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Branch/SD Name** | **Salesman Name** | **Customer Name** | **Program** | **Register Start Date** | **Register End Date** | **Execute Start Date** | **Execute End Date** | **Amount Register** | **Accumulated** |
| SD 01 | Salesman 01 | Customer 01 | ACC01 | 3/9/2017 | 3/15/2017 | 3/1/2017 | 3/31/2017 | 50,000 | 35,000 |
| Salesman 01 | Customer 02 | ACC01 | 3/9/2017 | 3/15/2017 | 3/1/2017 | 3/31/2017 | 50,000 | 24,000 |
| Salesman 02 | Customer 03 | ACC01 | 3/9/2017 | 3/15/2017 | 3/1/2017 | 3/31/2017 | 50,000 | 31,000 |
| SD 02 | Salesman 03 | Customer 04 | ACC01 | 3/9/2017 | 3/15/2017 | 3/1/2017 | 3/31/2017 | 50,000 | 45,000 |
| Salesman 04 | Customer 05 | ACC01 | 3/9/2017 | 3/15/2017 | 3/1/2017 | 3/31/2017 | 50,000 | 51,000 |

#### Inventory Holding Report

* **Purpose:**
  + Tracking stock at customer, suggest quantity and actual quantity of sales order
  + The list of product will be pre-defined for salesman do stock counting
* **Business Requirements:**
  + Data in report: Baseline
  + Filter data: From date – To date
  + Decentralize data view base on user’s role
  + Decentralize by Salesforce: data of channel/country/region/area just can be seen by manager of that channel/country/region/area
* **Report Data:**

| **Column Name** | **Description** | **Formula** | **Sample Data** |
| --- | --- | --- | --- |
| Country | Country of Branch/SD |  | Myanmar |
| Region | Region of Branch/SD |  | North |
| Area | Area of Branch/SD |  | North 01 |
| Branch/SD Code | Branch/SD Code |  | SD01 |
| Branch/SD Name | Branch/SD Name |  | Sub-Distributor 01 |
| Route | Route of Branch/SD |  | Route 01 |
| Salesman | Salesman |  | Salesman 01 |
| Product Code | Product Code |  | PRO01 |
| Product Name | Product Name |  | Product 01 |
| No Store | No Store | No of store in MCP | 100 |
| Distribution | Distribution | No of store available product 01 | 80 |
| OOS | The ratio of Out of stock frequency, if there are 2 customers F2 and F4 frequency  F2 customer: 2 time is out of stock  F4 customer: 1 time is out of stock | Sum = 2 times / F2 customer + 1 item / F4 customer = 2/2 +1/4 = 1.25 | 1.25 |
| ExD | Effective Distribution | counted quantity of last visit in the customer | 1000 |
| P3M | Past 3 months average sales | 3 months average sale from last month | 4000 |
| Constant | Constant = 30 days | Fix value | 30 |
| DOH | Days on Hand | = ExD / P3M \* constant | 7.5 |

* **Sample Report:**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Route Name** | **Salesman Name** | **Product Name** | **No Store** | **Distribution** | **OOS** | **EXD** | **P3M** | **DOH** |
| Route 01 | Salesman 01 | Product 01 | 100 | 80 | 10 | 1000 | 4000 | 7.5 |
| Route 02 | Salesman 02 | Product 01 | 100 | 70 | 11 | 1000 | 4000 | 7.5 |

#### Work\*with Report

* **Purpose:**
  + To tracking how the sales supervisor go work with sales reps
* **Business Requirements:**
  + Data in report: Real-time
  + Filter data: From date – To date
  + Decentralize data view base on user’s role
  + Decentralize by Salesforce: data of channel/country/region/area just can be seen by manager of that channel/country/region/area
* **Report Data:**

| **Column Name** | **Description** | **Formula** | **Sample Data** |
| --- | --- | --- | --- |
| Country | Country of Branch/SD |  | Myanmar |
| Region | Region of Branch/SD |  | North |
| Area | Area of Branch/SD |  | North 01 |
| Branch/SD Code | Branch/SD Code |  | SD01 |
| Branch/SD Name | Branch/SD Name |  | Sub-Distributor 01 |
| Route | Route of Branch/SD |  | Route 01 |
| Salesman | Salesman |  | Salesman 01 |
| Customer Code | Customer Code |  | C001 |
| Customer Name | Customer Name |  | Customer 01 |
| Salesman visit time | Salesman visit time |  | 08:25:19 - 08:25:20 |
| Sales sup visit time | Sales sup visit time |  | 08:25:19 - 08:25:20 |
| Salesman distance | Salesman distance |  | 179.4514595129 |
| Sales sup distance | Sales sup distance |  | 179.4514595129 |

* **Sample Report:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Branch/SD Name** | **Salesman Name** | **Customer Name** | **Salesman visit time** | **Sales sup visit time** | **Salesman distance** | **Sales sup distance** |
| SD 01 | Salesman 01 | Customer 01 | 08:25:19 - 08:25:20 | 08:25:19 - 08:25:20 | 179.4514595 | 179.4514595 |
| Salesman 01 | Customer 02 | 08:25:44 - 08:25:44 | 08:25:44 - 08:25:44 | 46.76865645 | 46.76865645 |
| Salesman 02 | Customer 03 | 08:25:46 - 08:25:46 | 08:25:46 - 08:25:46 | 46.76865645 | 46.76865645 |

#### Working Report – eCalendar

* **Purpose:**
  + Manage working status of Sales team
* **Business Requirements:**
  + Data in report: Real-time
  + Filter data: From date – To date
  + Decentralize data view base on user’s role
  + Decentralize by Salesforce: data of channel/country/region/area just can be seen by manager of that channel/country/region/area
* **Report Data:**

| **Column Name** | **Description** | **Formula** | **Sample Data** |
| --- | --- | --- | --- |
| Country | Country of employee |  | Myanmar |
| Region | Region of employee |  | North |
| Area | Area of employee |  | North 01 |
| Assessment Date | Date of Assessment |  | 3/8/2017 |
| Employee code | Employee code |  | Emp01 |
| Employee name | Employee name |  | Employee 01 |
| Working position | Working position |  | Sales sup |
| Type | Type of task: training, work with, non work with |  | Training |
| Task | Name of task |  | 6 steps of selling |
| Check in time | Time to check in this task | Type = non work with | 08:25:46 |
| Check out time | Time to check out this task | Type = non work with | 10:25:46 |
| Result | The Result of work with |  | PASS |
|  |  |  |  |

* **Sample Report:**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Assessment Date** | **Country** | **Region** | **Area** | **Employee Name** | **Type** | **Task** | **Check in time** | **Check out time** | **Result** |
| 08/03/2017 | Myanmar | North | North 01 | Employee 01 | Training | 6 steps of selling |  |  | PASS |
| 08/03/2017 | Myanmar | North | North 01 | Employee 01 | Work with | Overcome customer feedback |  |  | PASS |
| 08/03/2017 | Myanmar | North | North 01 | Employee 01 | Non work with | Visit market | 08:25:46 | 10:25:46 |  |

#### Training Report – eCalendar

* **Purpose:**
  + Monitor status “pass” or “not pass” of the Sales Reps in each training program
* **Business Requirements:**
  + Data in report: Real-time
  + Filter data: From date – To date
  + Decentralize data view base on user’s role
  + Decentralize by Salesforce: data of channel/country/region/area just can be seen by manager of that channel/country/region/area
* **Report Data:**

| **Column Name** | **Description** | **Formula** | **Sample Data** |
| --- | --- | --- | --- |
| Country | Country of employee |  | Myanmar |
| Region | Region of employee |  | North |
| Area | Area of employee |  | North 01 |
| Assessment Date | Date of Assessment |  | 3/8/2017 |
| Employee code | Employee code |  | Emp01 |
| Employee name | Employee name |  | Employee 01 |
| Working position | Working position |  | Sales sup |
| Training Program 1 | The Result of Training Program 1 |  | PASS |
| Training Program 2 | The Result of Training Program 2 |  | PASS |
| Training Program 3 | The Result of Training Program 3 |  | PASS |

* **Sample Report:**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Assessment Date** | **Region** | **Area** | **Employee Name** | **Training Program 1** | **Training Program 2** | **Training Program 3** |
| 08/03/2017 | North | North 01 | Employee 01 | PASS |  | PASS |
| 08/03/2017 | North | North 01 | Employee 02 | FAIL | FAIL |  |
| 08/03/2017 | North | North 01 | Employee 03 | PASS | PASS | PASS |

#### Training Result Analysis Report – eCalendar

* **Purpose:**
  + Measures number of Sales Reps that meet with the Training Objectives in the training program
* **Business Requirements:**
  + Data in report: Real-time
  + Filter data: From date – To date
  + Decentralize data view base on user’s role
  + Decentralize by Salesforce: data of channel/country/region/area just can be seen by manager of that channel/country/region/area
* **Report Data:**

| **Column Name** | **Description** | **Formula** | **Sample Data** |
| --- | --- | --- | --- |
| Country | Country of employee |  | Myanmar |
| Region | Region of employee |  | North |
| Area | Area of employee |  | North 01 |
| Branch/SD Code | Branch/SD Code |  | SD01 |
| Branch/SD Name | Branch/SD Name |  | Sub-Distributor 01 |
| Training Program | Program name 1 |  | Training program 1 |
| PASS | PASS | Count number of salesman passed this program | 66 |
| FAIL | FAIL | Count number of salesman failure this program | 24 |

* **Sample Report:**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Region** | **Area** | **Branch/SD Name** | **Training program** | **PASS** | **FAIL** |
| North | North 01 | Branch 01 | Training Program 1 | 44 | 39 |
| North | North 02 | Branch 02 | Training Program 1 | 70 | 62 |
| North | North 03 | Branch 03 | Training Program 1 | 194 | 120 |
| South | South 01 | Branch 04 | Training Program 1 | 194 | 115 |
| South | South 02 | Branch 05 | Training Program 1 | 153 | 70 |
| South | South 03 | Branch 06 | Training Program 1 | 155 | 73 |

#### Initiative and SBD Report

* **Purpose:**
  + To tracking SDB and initiative program for each salesman
* **Business Requirements:**
  + Data in report: Baseline
  + Filter data: by month
  + Decentralize data view base on user’s role
  + Decentralize by Salesforce: data of channel/country/region/area just can be seen by manager of that channel/country/region/area
* **Report Data:**

| **Column Name** | **Description** | **Formula** | **Sample Data** |
| --- | --- | --- | --- |
| Country | Country of salesman |  | Myanmar |
| Region | Region of salesman |  | North |
| Area | Area of salesman |  | North 01 |
| Salesman | Salesman |  | Salesman 01 |
| Channel | Channel of salesman |  | OT |
| Golden Point Target | Target for salesman |  | 3,353 |
| Golden Point Actual | Actual execution | Refer SDB definition | 1,647 |
| Golden Point % | Percent of actual execution on target | = ( Actual / Target ) \* 100% | 49% |
| Golden Store Target | Target for salesman |  | 235 |
| Golden Store Actual | Actual execution | Refer SDB definition | 24 |
| Golden Store % | Percent of actual execution on target | = ( Actual / Target ) \* 100% | 10% |
| Initiative 1 Target | Target for salesman |  | 210 |
| Initiative 1 Actual | Actual execution | Refer initiative definition | 107 |
| Initiative 1 % | Percent of actual execution on target | = ( Actual / Target ) \* 100% | 51% |
| Initiative 2 Target | Target for salesman |  | 210 |
| Initiative 2 Actual | Actual execution | Refer initiative definition | 181 |
| Initiative 2 % | Percent of actual execution on target | = ( Actual / Target ) \* 100% | 86% |

* **Sample Report:**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Salesman** | **Channel** | **Golden Point** | | | **Golden Store** | | | **Initiative 1** | | | **Initiative 2** | | |
| **Target** | **Actual** | **%** | **Target** | **Actual** | **%** | **Target** | **Actual** | **%** | **Target** | **Actual** | **%** |
| Salesman 01 | OT | 3,353 | 1,647 | 49% | 235 | 24 | 10% | 210 | 107 | 51% | 210 | 181 | 86% |
| Salesman 02 | OT | 2,920 | 1,537 | 53% | 227 | 11 | 5% | 200 | 94 | 47% | 200 | 185 | 93% |
| Salesman 03 | OT | 3,408 | 1,769 | 52% | 249 | 16 | 6% | 221 | 142 | 64% | 221 | 215 | 97% |
| Salesman 04 | KW | 867 | 374 | 43% | 33 | 2 | 6% | 33 | 21 | 64% | 33 | 25 | 76% |
| Salesman 05 | KR | 1,196 | 682 | 57% | 52 | 11 | 21% | 52 | 47 | 90% | 52 | 46 | 88% |

#### Delivery Report for Sub Distributor

* **Purpose:**
  + To tracking delivery status of sub distributor
* **Business Requirements:**
  + Data in report: real time
  + Filter data: from date – to date
  + Decentralize data view base on sub distributor
* **Report Data:**

| **Column Name** | **Description** | **Formula** | **Sample Data** |
| --- | --- | --- | --- |
| Value | The number of sales orders |  | 100 |
| Invoice | The amount of sales orders |  | 10 |
| Order | Invoice and value from salesman |  | 100 |
| Delivery | Invoice and value SD delivered for customers |  | 80 |
| Cash | Invoice and value by cash |  | 90 |
| Credit | Invoice and value by credit |  | 10 |
| Cancel | Invoice and value SD can’t deliver for customers |  | 10 |
| Pending | Invoice and value of Sales Order "Open" status |  | 10 |

* **Sample Report:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Month** | | **Day** | |
| **Value** | **Invoice** | **Value** | **Invoice** |
| Order | 100 | 10 | 100 | 10 |
| Delivery | 80 | 8 | 80 | 8 |
| Cash | 90 | 9 | 90 | 9 |
| Credit | 10 | 1 | 10 | 1 |
| Cancel | 10 | 1 | 10 | 1 |
| Pending | 10 | 1 | 10 | 1 |