Contents

Executive Mapping

Here in this screen, we can map the CSL, DP and Account Executives to the customers and can also update them with new resources.

1. Data Table

	Customer	CSL	Delivery Partner	Account Executive	Action Item
☐	Advance Auto Parts	Dileep Bonagiri	Girish Konnur	Karthik Rajeswar	💾
☐	Hudson Advisors	Girish Konnur	Girish Konnur	Deepak Goel	💾
☐	MasterCard	Neha Dhawale	Shobhit Gupta	Kevin Demilt	💾
☐	Veros Real Estate Solutions, LLC	Deepak Goel	Type to Search	Deepak Goel	💾
☐	DTE Energy Co.	Rajeswari Kanupuru	Kishan Rao Alwapuram	Jeanette Wareham	💾
☐	IBM Middle East FZ-LLC	Varun Sakshi Sharma	Varun Sakshi Sharma	Ajay Malgaonkar	💾
☐	NYC Health + Hospitals	Andrew Blank	Deepak Goel	Darryl Zack	💾
☐	Spruce Technologies	Rajeswari Kanupuru	Andrew Blank	Type to Search	💾
☐	Intellective	Deepak Goel	Syam Sukumar Vurubindi	Sumit Bhatia	💾
☐	Nutrien	Type to Search	Type to Search	James Mangus	💾
☐	McKesson	Rajeswari Kanupuru	Suresh Babu Sabbisetti	Sarat Addanki	💾
☐	Clipper	Type to Search	Debasish Behera	Jonathan Sharland	💾

Customer: Here we can view the Name of the customer and by clicking on the customer screen it redirects to the Customer view wherein we can view all the details of the customer.

CSL: Here it displays the name of the CSL and we can update after selecting the Row.

Delivery Partner: Here it displays the name of the DP and we can update after selecting the Row.

Account Executive: Here it displays the name of the Account Executive and we can update after selecting the Row.

Action Item: Here we have a Save Icon this icon will only be active once if changes were in those details.
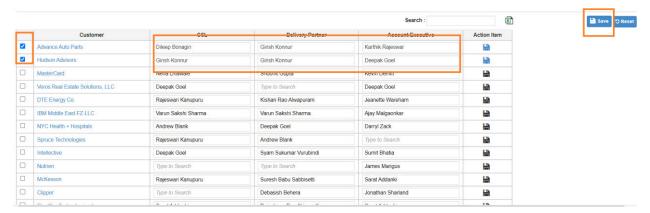
2. Steps Followed for Uploading the File

Step 1: By selecting the particular row the details that can be edited can be open for editing and updating.

Step 2: Now by updating the all the changes required and by clicking on save those updated changes will be saved.
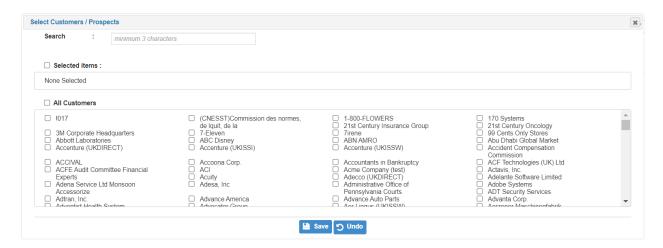
Note: If we are looking to update multiple customers data then by selecting all the customers and by updating the required changes and clicking on Save Button available on the right corner those all changes will be updated.
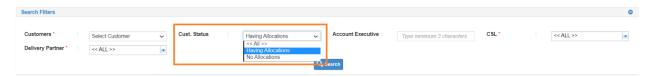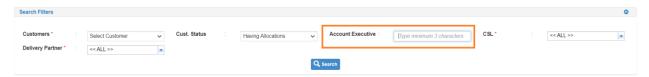

3. Filters

Customers: Here we can select the particular customer we can select the particular customer those all-selected customer details will be displayed in the data table.
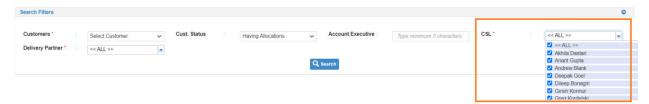
Cust. Status: Here we can select the particular status of the customers based on their allocations or non-allocations.

Account Executive: Here we can select the particular executive by searching for a particular executive name.

CSL: Here we can select the particular CSL or can ALL CSL's for whom the particular data will be displayed.

Delivery Partner: Here we can select the particular DP or can ALL DP's for whom the particular data will be displayed.