



# CLEETA PHILIP LOBO

## PROFILE

A detail-oriented and highly organized professional with extensive experience in Sales Tax Recovery and Dealer Management. Skilled in collecting and managing C-Forms, maintaining customer confidentiality, and ensuring compliance with company policies. Experienced in coordinating with internal teams and management to provide detailed reports and actionable insights. Expertise in dealer agreements, outstanding payments, with a strong focus on process optimization and account management.

## CONTACT

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- 📅 23-10-1995
- 💍 Married
- visa Visa : Husband Visa

## EDUCATION

- PG Diploma in Business Management
- Bachelor in Management Studies
- Higher secondary certificate
- Secondary school certificate

## SKILLS

- Tally ERP
- MS Word, MS Excel
- SFDC (Salesforce software)
- Teamwork
- Excellent verbal and personal Communication
- Files and document management
- Data entry and management.
- Problem solving

## WORK EXPERIENCE

- **Godrej Material Handling, Mumbai** Oct 2017- Aug 2024  
**Admin Assistant**
  - Create and keep record of the customers owing the organization.
  - Maintain high level of confidentiality of the organization with the customer and dealers.
  - Produce reports for the management when required.
  - Keep track on the PAN India customer and dealers to get the C-Form.
  - Planning course of action to recover the C-Form.
  - Investigate and resolve discrepancies.
  - Continuous follow-up through calls and mails.
  - Coordination with Sales Head & their teams.
  - Maintain trustworthy relationship with customers to avoid future issues.
  - Update account status and database regularly.
- **Dealer Management**
  - Keep track on Dealer agreement, certificate and extension of dealership.
  - Communicate effectively with the dealer owner or sales engineer for report.
  - Doing follow-up with branches or dealer for weekly and monthly outstanding. Pulling of funds from banks such as Yes Bank, Standardchartered, TVS credit.
  - Advance payment collection follows up.
  - Maintain dealer stock and secondary data.
  - Extra Skills like maintain dealer error list outstanding payment which is not cleared on time.
  - Update dealer account statement on daily bases.
  - Recovery of TDS certificate from the dealers through calls and mails.
- **Sales Force (SFDC)**
  - Create account of the customers on daily basis.
  - Create addresses and GSTIN for different location of the customers.
  - Create leads of customers for enquiries of any product.
  - Coordinate with sales team through mails for data require.
  - Convert lead to opportunity (Customer confirmation)

## LANGUAGES

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- English
- Hindi
- Marathi
- Konkanni

### Infor LN (Warehouse receipt)

- Maintain dealer commission data entry in the system.
- Process payment to dealer after receipt is punched in the system.
- To ensure accuracy and avoid overpayments, the Account Payable will typically perform a three-way match. This involves matching: The purchase order , The goods receipt note or delivery receipt and the invoice from the supplier.
- All transactions are documented for future reference, audits and financial analysis in MIS