

PJP Creation User Manual

STEP - 1

- Click on PJP Tab and click on New and then select the Month and the Year for the PJP creation

JSW Cement LTD | Home | Chatter | Leads | Accounts | Market Information JSW | **PJP** | Visits | Order Requests | Reports | Dashboards | More

PJP All | **New** | Import

50+ Items - Sorted by Month Plan Name - Last updated a few seconds ago

	MONTH PLAN NAME ↑	USER	START DATE	END DATE	STATUS	MONTH NAME	LAST MODIFI...	CREATED DA...	OWNER ALIAS
1	Abey Mathew March 2017	Abey Mathew	1/3/2017	31/3/2017	New Request	Abey Mathew M...	17/3/2017 5:21...	17/3/2017 5:21...	AMathew
2	Abhijeet Rajendra Mithari March 2017	Abhijeet Rajendr...	1/3/2017	31/3/2017	Approved	Abhijeet Rajendr...	20/3/2017 6:43...	20/3/2017 5:13...	ARajendr
3	Abhishek Doragandia March 2017	Abhishek Dorag...	1/3/2017	31/3/2017	Rejected	Abhishek Dorag...	4/3/2017 5:17 ...	4/3/2017 3:20 ...	ADoragan
4	Abhishek Ganbote March 2017	Abhishek Ganbo...	1/3/2017	31/3/2017	Submitted	Abhishek Ganbo...	21/3/2017 5:10...	21/3/2017 1:09...	AGanbote
5	Adishesha Nagaratti March 2017	Adishesha Naga...	1/3/2017	31/3/2017	Approved	Adishesha Naga...	9/3/2017 5:54 ...	8/3/2017 5:15 ...	ANagarat
6	Aditya Kumar Chalamakoti February 2...	Aditya Kumar Ch...	1/2/2017	28/2/2017	Approved	Aditya Kumar Ch...	17/2/2017 8:13...	12/2/2017 10:4...	AKumar C
7	Aditya Kumar Chalamakoti March 2017	Aditya Kumar Ch...	1/3/2017	31/3/2017	Approved	Aditya Kumar Ch...	28/2/2017 5:09...	16/2/2017 1:40...	AKumar C

Please Enter Month for your PJP

March 2017

Create PJP

STEP - 2

- Click on the first filter on the right side under the filter custom data and select the type of Visits to be planned.. The available types are as follows
 - Leads
 - Accounts
 - Business Partners
 - Depots
 - Sites
 - Influencers
 - Events
 - General Visits

Filter Custom Data

Filter by

Account ▼

Type

Trade ▼

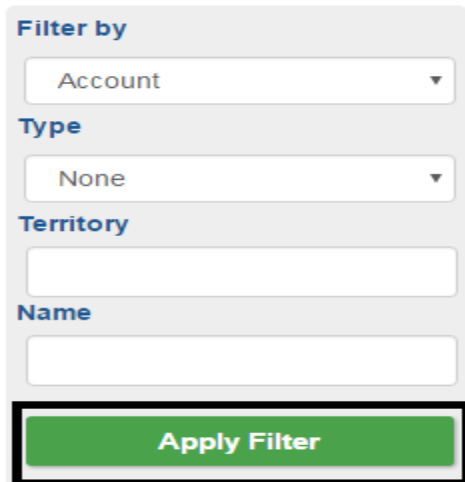
Territory

Name

- Each Type of Visit has its own Sub-Filters to filter and segregate the results shown to drag and drop. The types of Sub-Filters and their significance is
 - Lead
 - Type : To filter the Lead results by Trade or Non Trade
 - Name : To search the Lead by its name and getting only the particular lead in the search results
 - Account
 - Type : To Filter Accounts by Trade or Non Trade
 - Territory : To filter and show the accounts only in a particular territory
 - Name : To search the accounts by its name
 - Business Partners
 - Type : To filter the data by MMC, Sub-Dealers or Sales Promoters
 - Sites
 - Type : To filter by Project site or IHB site
 - Influencer
 - Type : To filter by Engineers, Consultants, Architects ... ETC
 - Event
 - Type: To filter by type of event like Mason Meet, Counter Meet..ETC

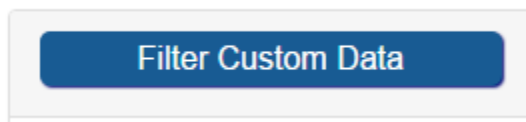
STEP - 3

- Once Selecting the Filters click on the Apply Filter



The image shows a filter configuration panel with a light gray background. It contains four sections: 'Filter by' with a dropdown menu showing 'Account'; 'Type' with a dropdown menu showing 'None'; 'Territory' with an empty text input field; and 'Name' with an empty text input field. At the bottom of the panel is a green button with the text 'Apply Filter' in white. This button is highlighted with a thick black rectangular border.

- Minimize the Filter section by clicking on the Filter Custom Data Heading at the top

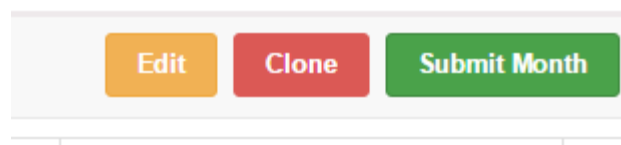


The image shows a single button with a blue gradient and rounded corners. The button has the text 'Filter Custom Data' in white, centered on it.

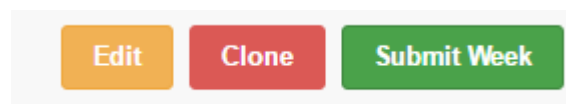
- The results will be available below the apply filter section

Name
E.S.B. AGENCIES
SRI LAKSHMI NARASIMHA CEMENT AGENCY
ALOK ASSOCIATES
SHRI SAI ENTERPRISES
P. UMA MAHESH

- Then, Select the desired visit and drag them into the particular dates as part of the month planning and keep dragging them into the calendar date blocks.
- Once the planning is completed for the entire month, click on save and then Submit Month for approval from manager



- EDIT button can be used to change the plan before submitting to manager for approval
- Clone Button can be used to copy paste the entire month plan and reuse it for another month by changing the dates
- Submit Week can be used to change a weekly plan and send for managers approval

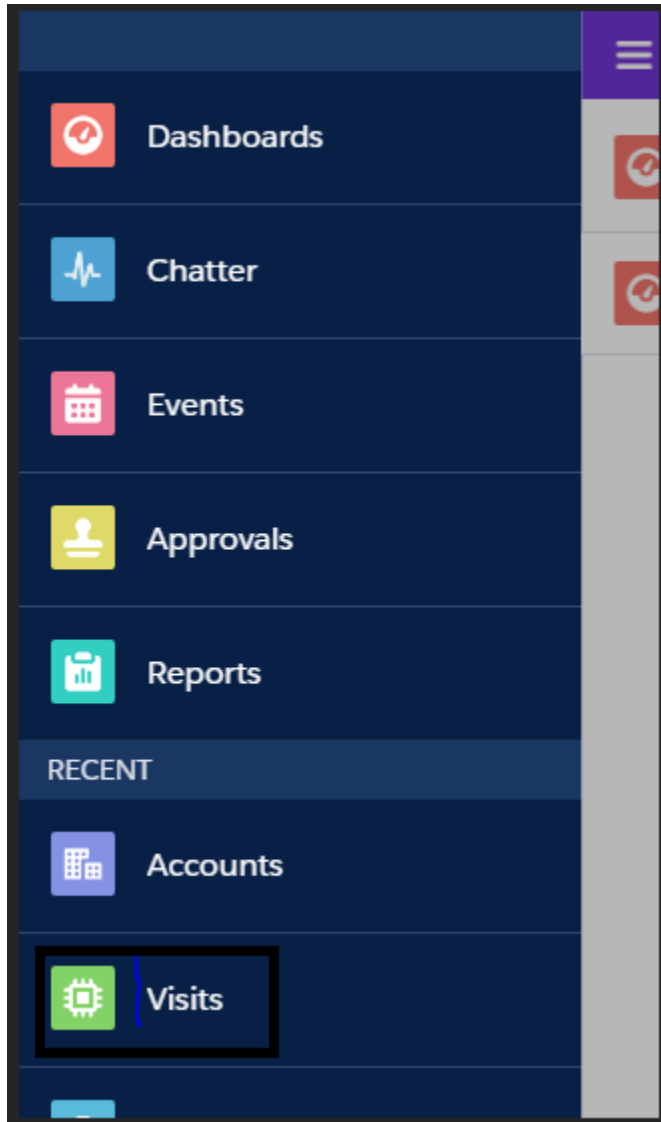


KEY NOTES:

- 1. If any names are not appearing in the results then the Name filter can be used to search for that missing data***
- 2. Leads, Project Sites, Influencers would only be available if the SO or TSO has already created a record of their Information in the respective Pages***
- 3. Refer to the User manual shared on how to create new Leads, Project Sites, and Influencers & Events***

Leads VISITS FLOW

STEP - 1



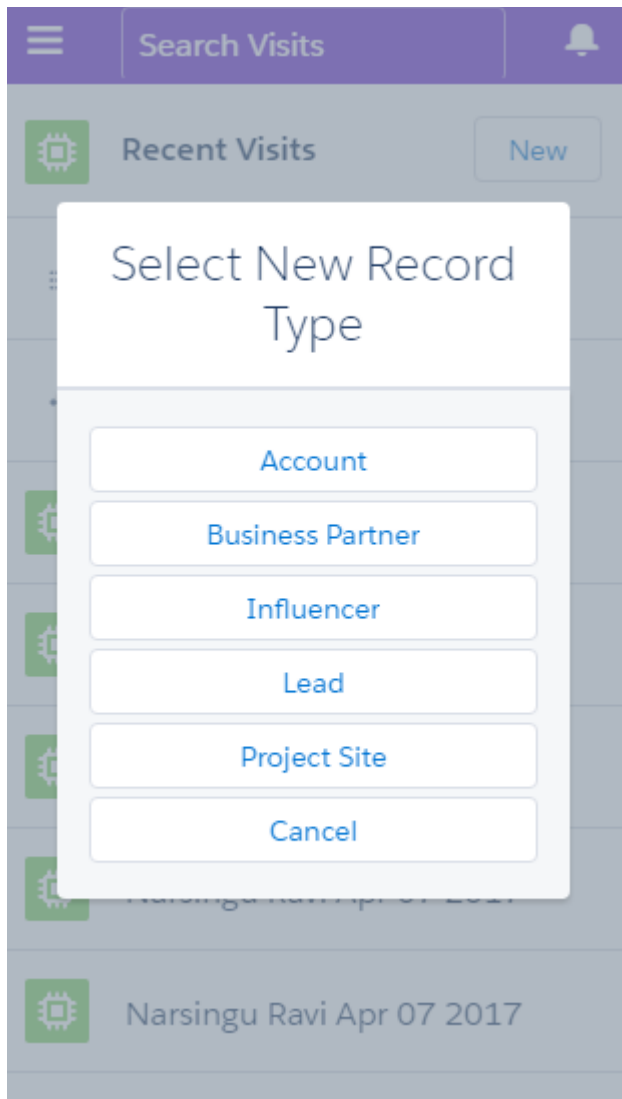
- Click on the Visit Tab

STEP - 2



- Click on New Button
- In case of Planned Visits, User can select any of the visits and proceed from Step - 5

STEP - 3



- Select the Appropriate type of Unplanned Visit which is being visited

NOTES:

1. Account is for Dealers, Non-Trade Parties
2. Depots is for Warehouses
3. Business Partners is for Sub-Dealers & Sales Promoters
4. Lead is for prospective Dealers & Non Trade Parties (Non JSW Dealers, , Non Cement Dealers, Non JSW Customers)
5. Site is for IHB & Project Sites
6. Influencers is for Engineers, Consultants, Architects, Builders

STEP - 4

Cancel

Create Visit: A...

Save

INFORMATION

* Visit Name

Sample Text

* Account

Date

- Enter the Visit name as “Unplanned”
- Type the name of the account and click on search to select the account

NOTE:

In Case of Business Partner the corresponding field would be displayed here to search and enter

- Once the Account/ Business Partner/ Lead/ Influencer/ Project Site is selected click on save button on the top left corner
- In the below fig, “City Builders” Account has been selected i.e this flow from here on will talk about an unplanned visit for “City Builders” account.

Cancel

Account

city

Account

Q "city"

Cancel

Account

city

Account

CITY BUILDERS

Cancel

Create Visit: Account

Save

INFORMATION

* Visit Name

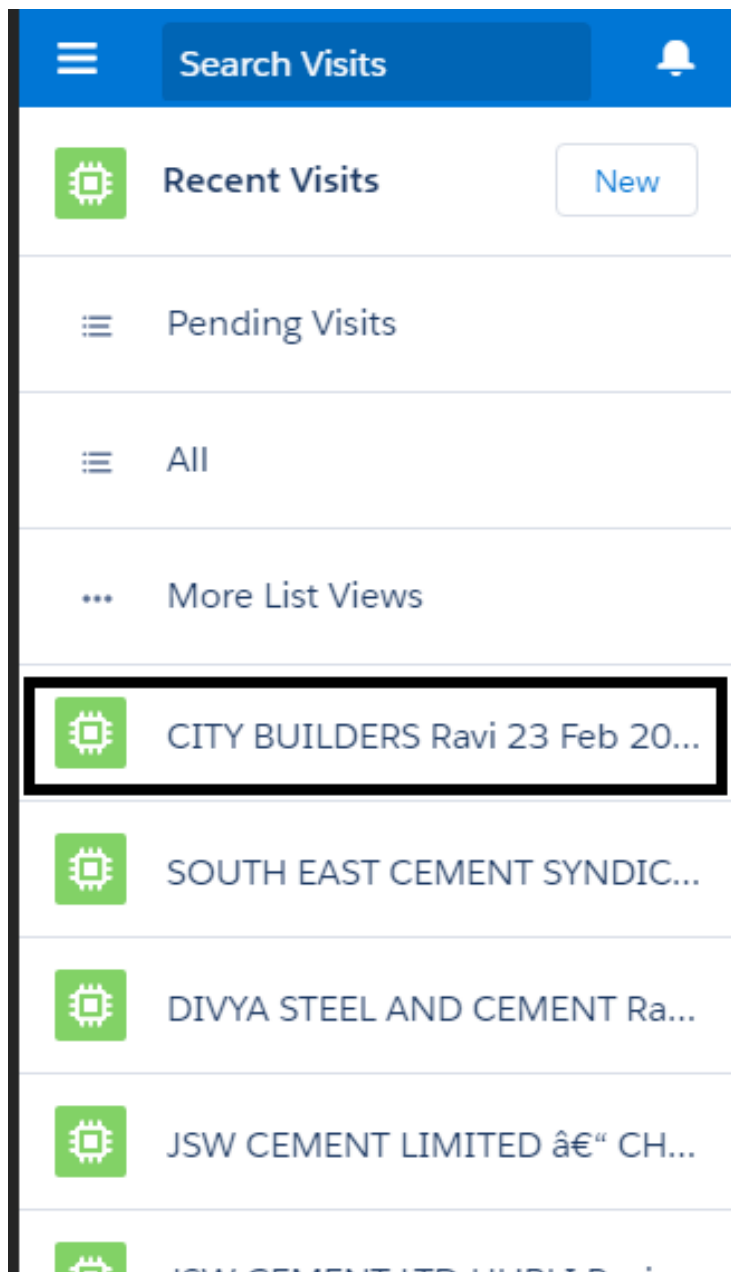
New

Account

CITY BUILDERS

Planned Date

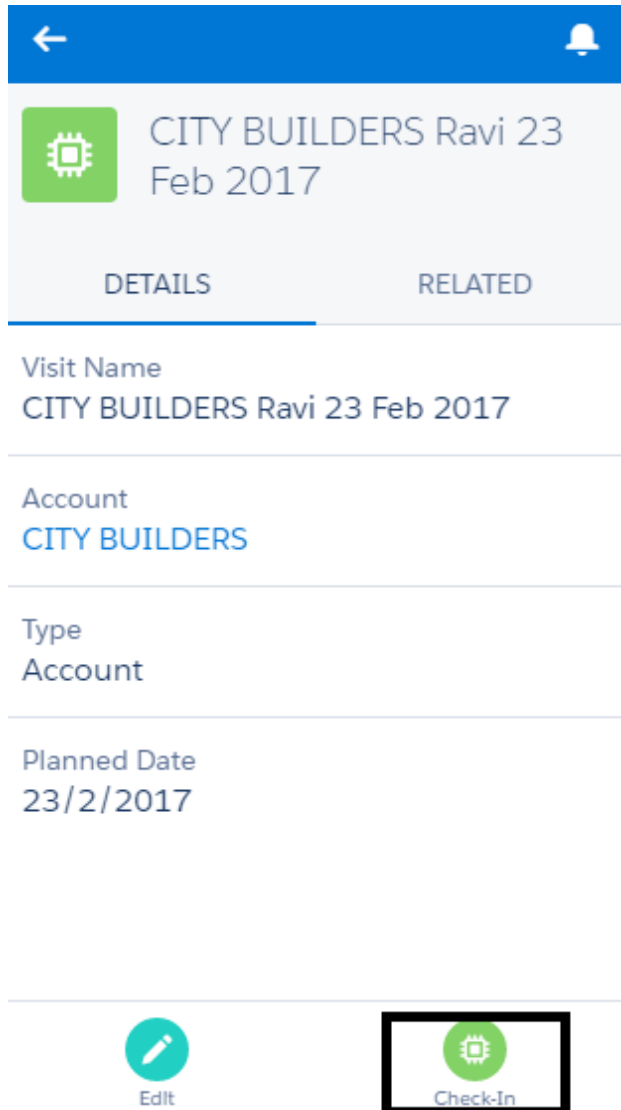
STEP - 5



- Once saved, click on the first visit to open the created visit


Note : Planned Visit Flow will be similar from here

STEP - 6



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 CITY BUILDERS Ravi 23 Feb 2017


DETAILS RELATED


Visit Name
CITY BUILDERS Ravi 23 Feb 2017

Account
CITY BUILDERS

Type
Account

Planned Date
23/2/2017

 Edit

 Check-In

- Once opened, click on the Check-In button at the bottom of the screen

STEP - 7

- Once checked-in, update the Visit report and save details as shown in the below figures

Cancel

Check-In

Save

Purpose of Visit

JSW stock level (number of bags)

JSW Shop Board Condition

--None--

Payment collected in current visit

JSW Bag Visibility

--None--

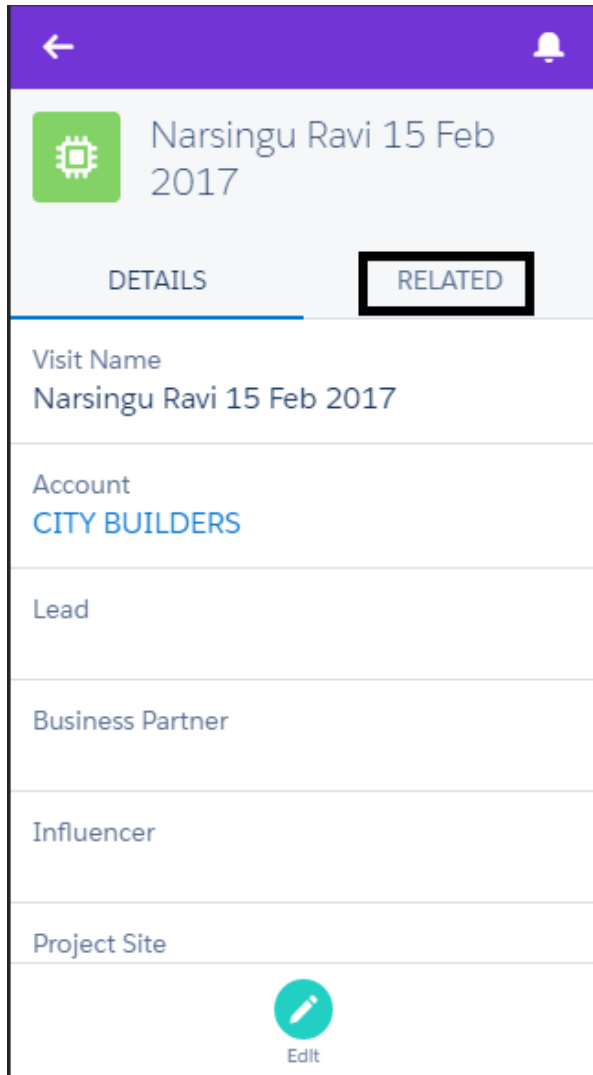
Pending Payment Committed Date

mm / dd / yyyy

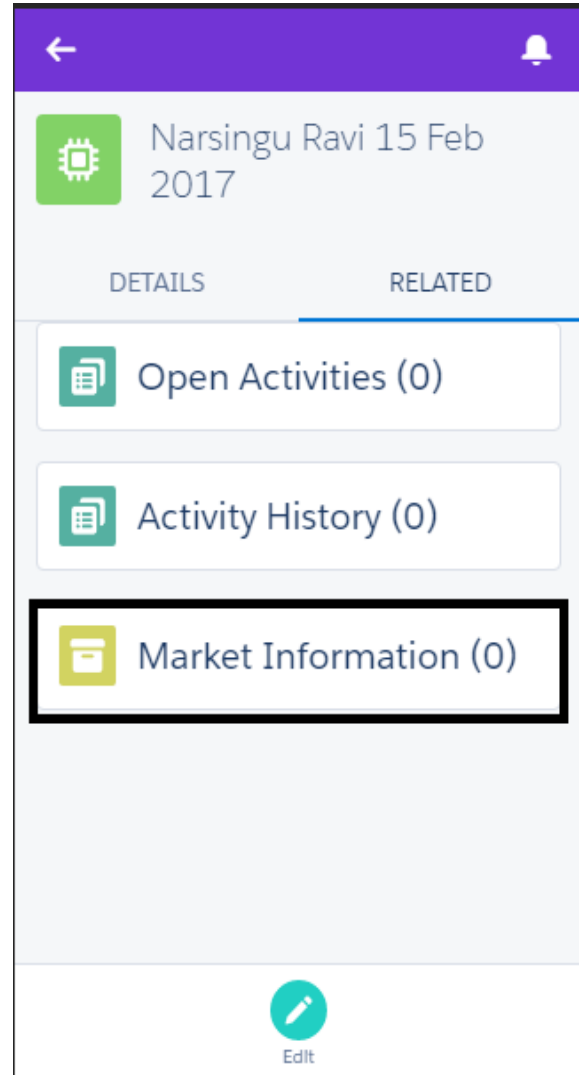
Details of the Visit

STEP - 8



- After entering the Visit Details, Click on related or swipe left on the screen to find the Market Information Tab




This screenshot shows the 'DETAILS' tab of the app. At the top, there is a purple header with a back arrow and a bell icon. Below the header, a green chip icon is next to the text 'Narsingu Ravi 15 Feb 2017'. Underneath, there are two tabs: 'DETAILS' (selected) and 'RELATED' (highlighted with a black box). The main content area consists of several rows, each with a label and a value: 'Visit Name' with 'Narsingu Ravi 15 Feb 2017', 'Account' with 'CITY BUILDERS', 'Lead', 'Business Partner', 'Influencer', and 'Project Site'. At the bottom, there is a teal circular button with a pencil icon and the text 'Edit'.




This screenshot shows the 'RELATED' tab of the app. It has the same purple header and title as the 'DETAILS' tab. Below the title, there are three items, each with a green chip icon and text: 'Open Activities (0)', 'Activity History (0)', and 'Market Information (0)'. The 'Market Information (0)' item is highlighted with a black box. At the bottom, there is a teal circular button with a pencil icon and the text 'Edit'.



Market Information
0 items

There are no records in this list.


New

MARKET INFORMATION

Units - Rs/Bag

Brand

Select Brand ▼

Product

Select Product ▼

BP

0

WSP



0


RSP

0

- Use the comments option to enter details about any branding activities of competitors
- Select the Brand and the Product from the list options and enter the price information for the corresponding brands
- Add row can be used to add price information of more brands
- Once the price information is entered, click on save button
- Use the back navigation button on the tab to go back to check-out page of the visit

- **STEP - 9**





CITY BUILDERS Ravi 23
Feb 2017

DETAILS

RELATED

Visit Name

CITY BUILDERS Ravi 23 Feb 2017

Account

CITY BUILDERS

Check In


2017-02-23 08:50:50Z


Type

Account

Planned Date

23/2/2017


Edit


Check-Out

Cancel

Check-Out

Save

Check Out

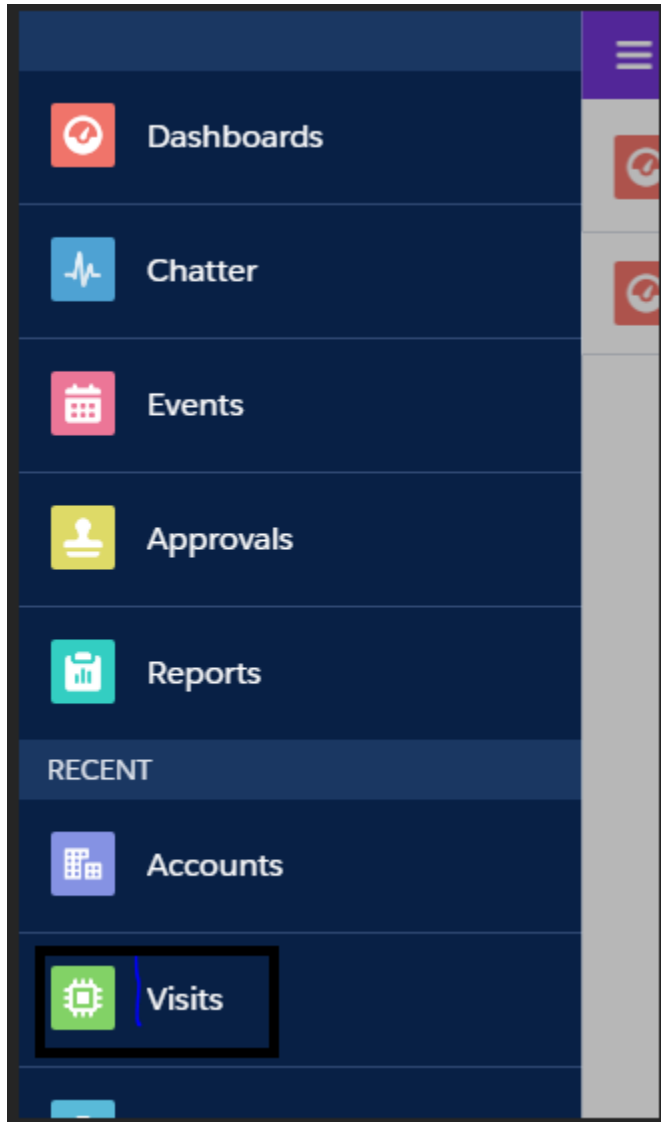
2017-02-23 08:51:36Z

Note:

Business Partner visit is similar to Account.

Leads VISITS FLOW

STEP - 1



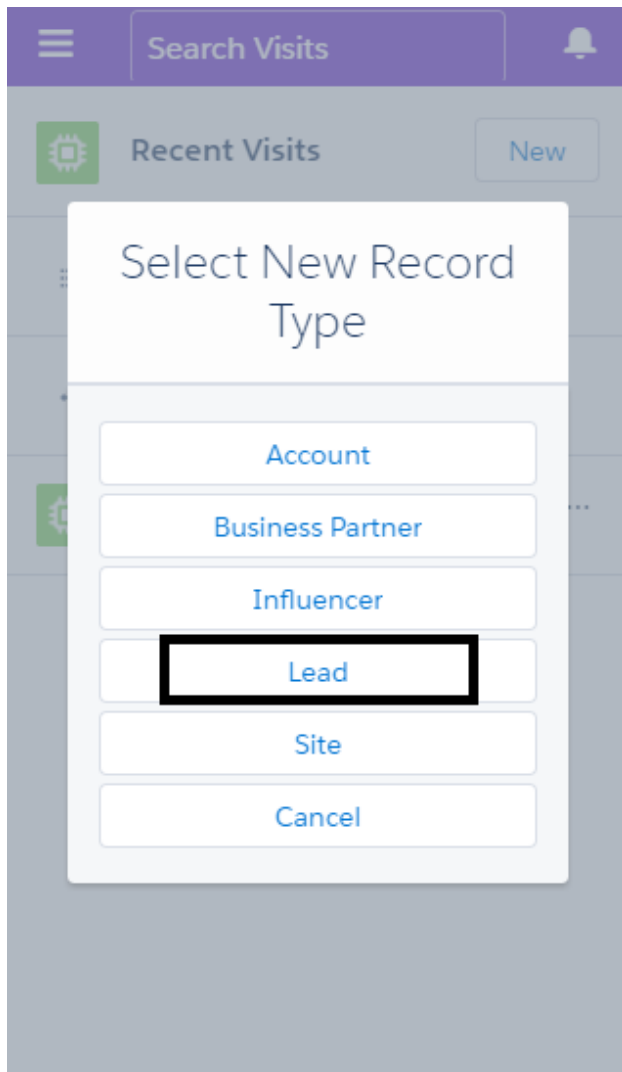
- Click on the Visit Tab

STEP - 2



- Click on New Button
- In case of Planned Visits, User can select any of the visits and proceed from Step - 5

STEP - 3



- Select the Appropriate type of Unplanned Visit which is being visited

NOTES:

1. Account is for Dealers, Non-Trade Parties
2. Depots is for Warehouses
3. Business Partners is for Sub-Dealers & Sales Promoters
4. Lead is for prospective Dealers & Non Trade Parties (Non JSW Dealers, , Non Cement Dealers, Non JSW Customers)
5. Site is for IHB & Project Sites
6. Influencers is for Engineers, Consultants, Architects, Builders

STEP - 4

Cancel

Create Visit: L...

Save

INFORMATION

Visit Name

Planned Date

Lead

Planned

☐

- Enter the Visit name as “Unplanned”
- Type the name of the lead and click on search to select the account

- Once the Lead is selected click on save button on the top left corner

- In the below fig, “Sundar”

Lead has been selected i.e this flow from here on will talk about an unplanned visit for “Sundar” lead.

Cancel

Create Visit: L...

Save

INFORMATION

* Visit Name

Unplanned

Planned Date

* Lead

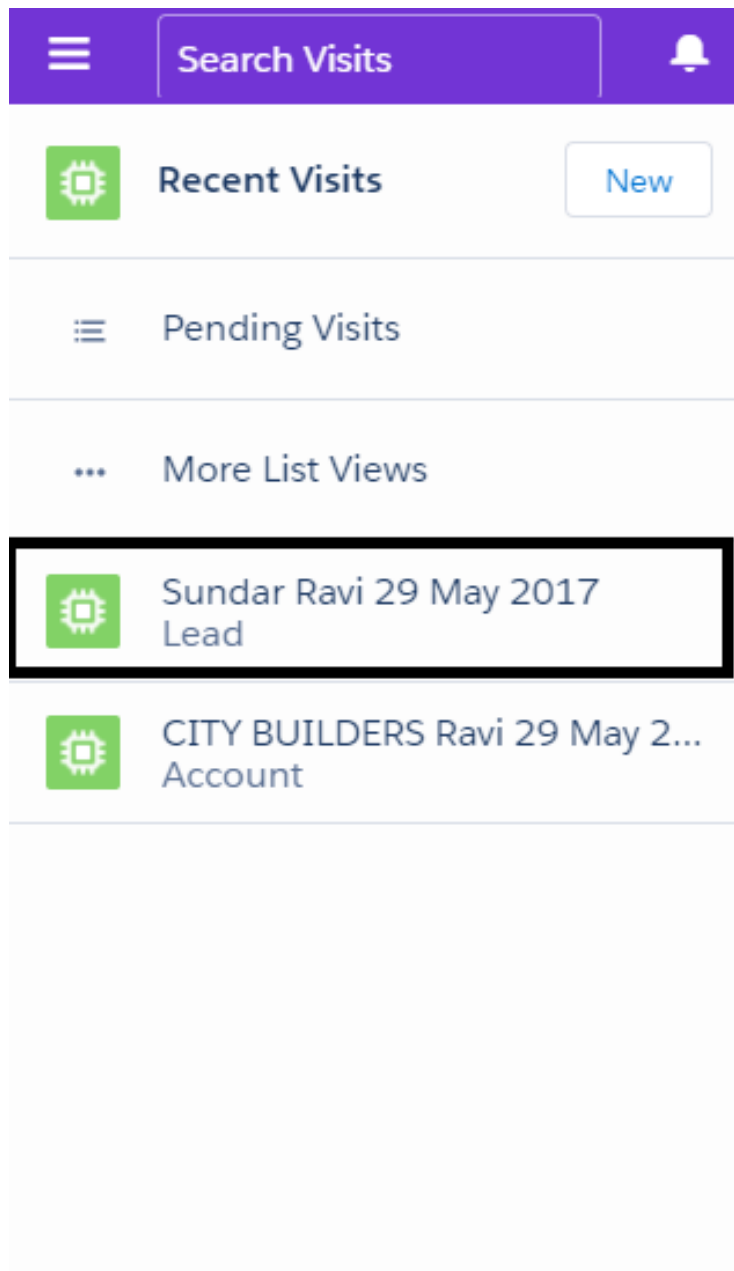
Sundar

X

Planned

☐

STEP - 5



- Once saved, click on the first visit to open the created visit

Note : Planned Visit Flow will be similar from here

STEP - 6

The screenshot shows a mobile application interface with a purple header bar containing a back arrow and a notification bell. Below the header, there is a green square icon with a white gear-like symbol, followed by the text "Sundar Ravi 29 May 2017". Underneath this, there are two tabs: "DETAILS" (which is selected and underlined) and "RELATED". The "DETAILS" tab contains the following information: "Visit Name" with the value "Sundar Ravi 29 May 2017", "Planned Date" with the value "29/5/2017", "Lead" with the value "Sundar", and "Planned" with an unchecked checkbox. At the bottom of the screen, there is a green square icon with a white gear-like symbol, labeled "Check In", which is highlighted with a black rectangular box.

- Once opened, click on the Check-In button at the bottom of the screen

STEP - 7

- Once checked-in, update the Visit report and save details as shown in the below figures

Cancel

Check In

Save

* Visit Name

Sundar Ravi 29 May 2017

Purpose of Visit

Details of the Visit

Any image to be captured

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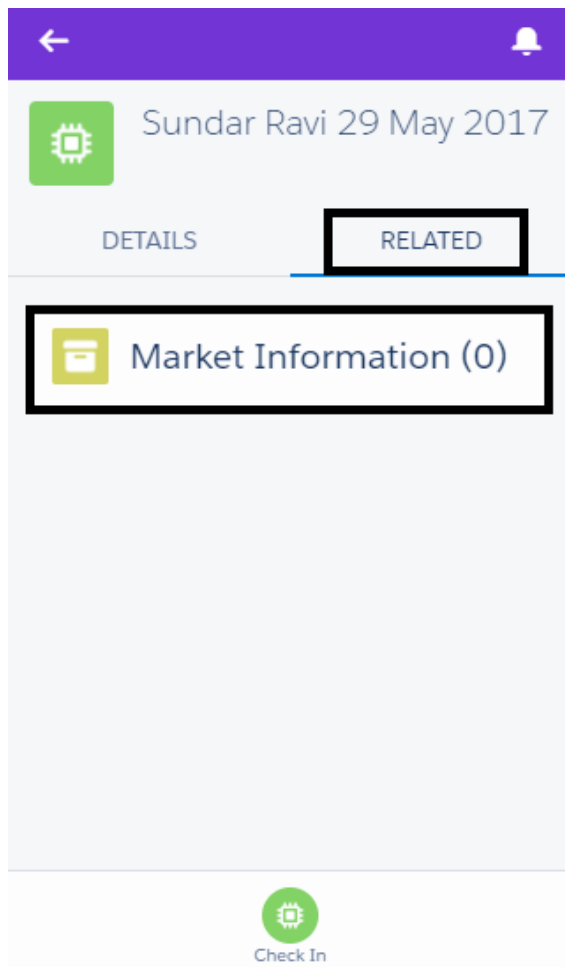
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STEP - 8

- After entering the Visit Details, Click on related or swipe left on the screen to find the Market Information Tab



—

Market Information
0 items

There are no records in this list.

New

MARKET INFORMATION

Units - Rs/Bag

Brand

Select Brand

Product

Select Product

BP

0

WSP



0

RSP

0

- Use the comments option to enter details about any branding activities of competitors
- Select the Brand and the Product from the list options and enter the price information for the corresponding brands
- Add row can be used to add price information of more brands
- Once the price information is entered, click on save button
- Use the back navigation button on the tab to go back to check-out page of the visit

- **STEP - 9**



 Sundar Ravi 29 May 2017

DETAILS

RELATED

Visit Name

Sundar Ravi 29 May 2017

Lead

Sundar

If Potential Lead Share with Manager

☐


Type


Lead

Planned Date

29/5/2017

Construction Stage

 Edit

 Check-Out

Cancel

Check-Out

Save

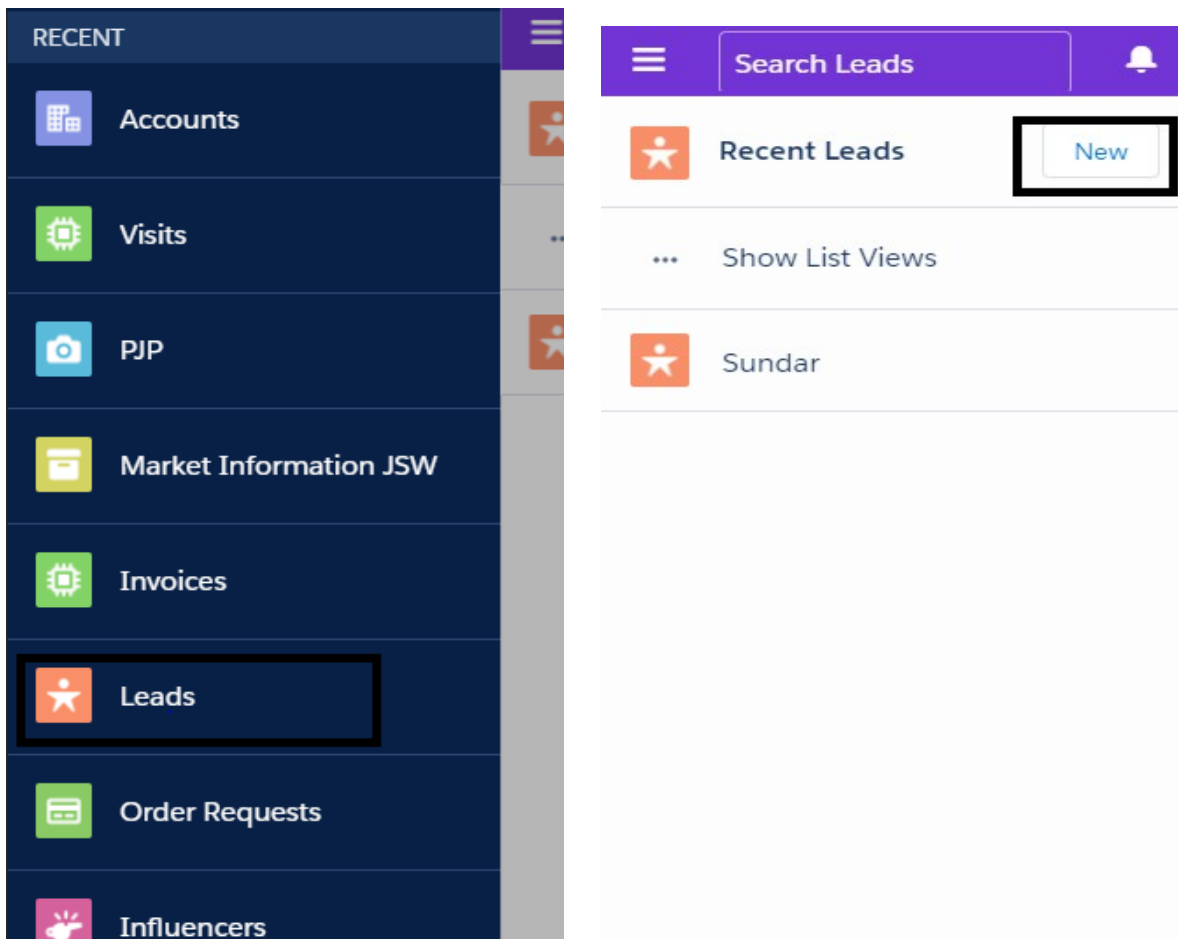
Check Out

2017-05-29 17:00:30Z

Lead Creation User Manual

STEP - 1

- Search for Lead Tab on the and click on new at the Right Top Corner



STEP - 2

- Enter the newly identified prospective customers
- The important information to be entered would be
 - Name of the person met at the new customer place
 - Type
 - Address
 - Phone Number & Email
 - KYC Form Filled

- Status of the Lead

Cancel

Create Lead

Save

LEAD INFORMATION

* Type

--None--

* Name

--None--

First Name

Middle Name

Last Name

Suffix

* Company

* Lead Status

New

Lead response

--None--

Lead Owner

Narsingu Ravi

Total counter potential in MT

Blended cement potential in MT

Catgeory A potential in MT

Wholesale Percentage

No of Sub Dealers

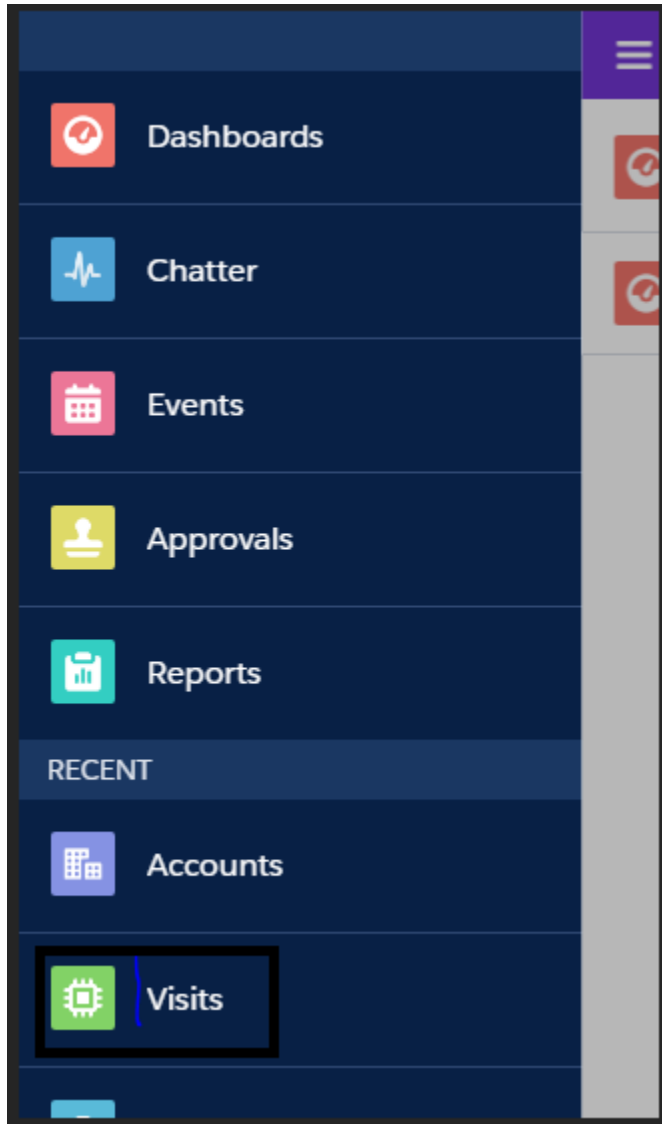
- Once Completed please click on save

NOTE:

Leads are to be entered in the system only by Sales officers and not Technical Services

Sites VISITS FLOW

STEP - 1



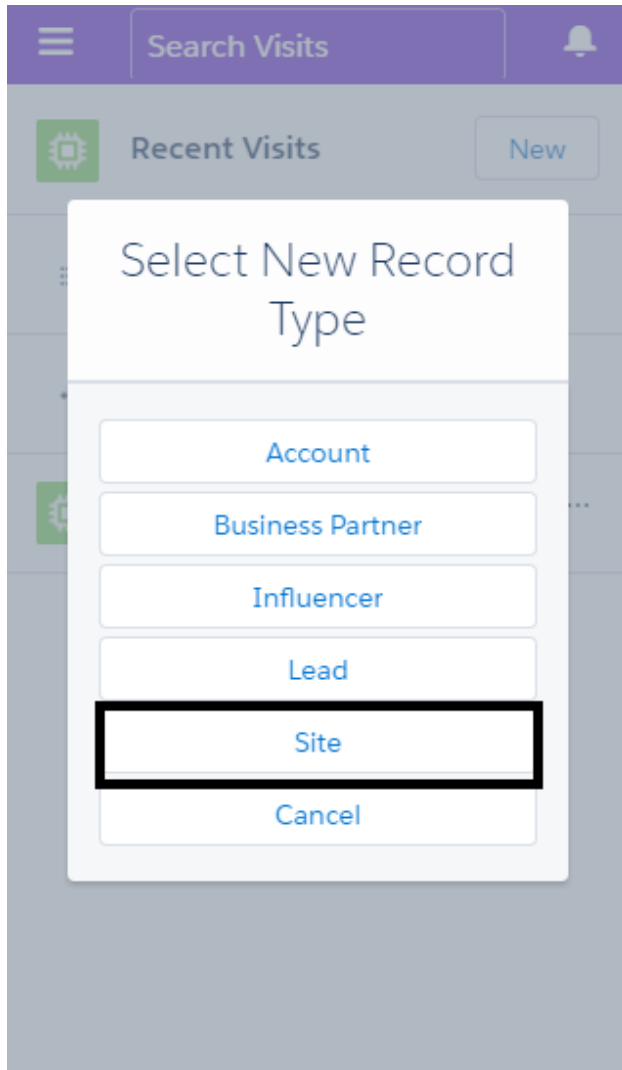
- Click on the Visit Tab

STEP - 2



- Click on New Button
- In case of Planned Visits, User can select any of the visits and proceed from Step - 5

STEP - 3



- Select the Appropriate type of Unplanned Visit which is being visited

NOTES:

1. Account is for Dealers, Non-Trade Parties
2. Depots is for Warehouses
3. Business Partners is for Sub-Dealers & Sales Promoters
4. Lead is for prospective Dealers & Non Trade Parties (Non JSW Dealers, , Non Cement Dealers, Non JSW Customers)
5. Site is for IHB & Project Sites
6. Influencers is for Engineers, Consultants, Architects, Builders

STEP - 4

Cancel

Create Visit: A...

Save

INFORMATION

* Visit Name

Sample Text

* Account

Q


Date

- Enter the Visit name as “Unplanned”
- Type the name of the Site and click on search to select the account


- Once the Site is selected click on save button on the top left corner
- In the below fig, “Ravi Site” has been selected i.e this flow from here on will talk


about an unplanned visit for “Ravi Site” .

STEP - 5




Search Visits






Recent Visits


New




Pending Visits




More List Views



Sundar Ravi 29 May 2017
Lead



CITY BUILDERS Ravi 29 May 2...
Account



Ravi Construction site Ravi 29 ...
Project Site


- Once saved, click on the first visit to open the created visit

Note : Planned Visit Flow will be similar from here

STEP - 6

←

🔔

 Ravi Construction site
Ravi 29 May 2017


DETAILS RELATED

Visit Name
Ravi Construction site Ravi 29 May 2017

Planned Date
29/5/2017

Project Site/IHB Site
Ravi Construction site

Planned
☐

 Check In

- Once opened, click on the Check-In button at the bottom of the screen

STEP - 7

- Once checked-in, update the Visit report and save details as shown in the below figures

Cancel

Check In

Save

* Visit by TSO/LATF

--None--

LATF Name

--None--

* Activity Type

--None--

Activity Sub Type

--None--

* Site demo type

--None--

Construction Stage

--None--

Details of the Visit

Cancel

Check In

Save

--None--

Details of the Visit

If Potential Lead Share with Manager

☐

Any image to be captured

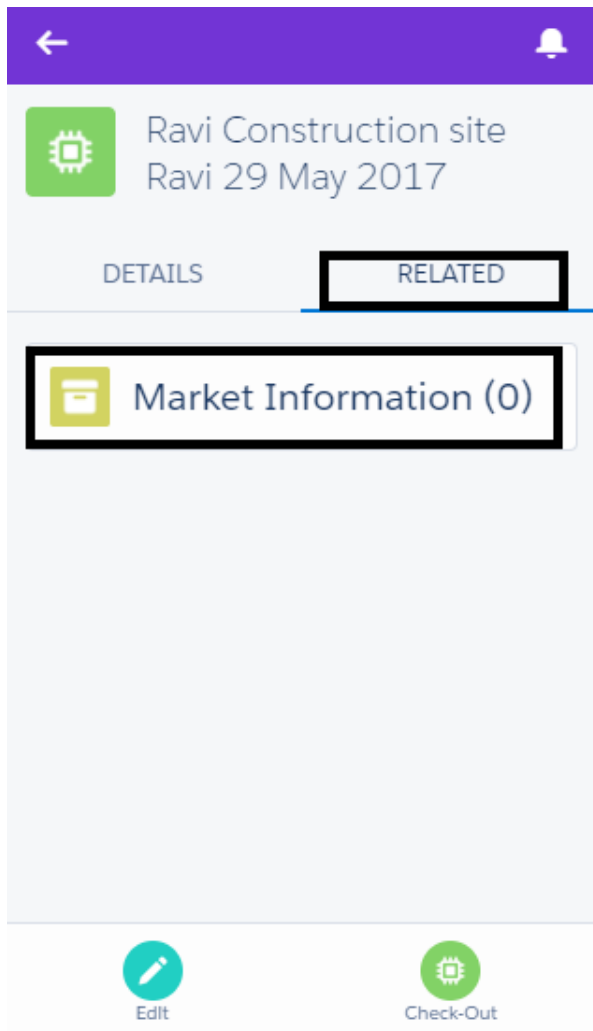
B I U

Note:

1. If Potential Lead share with the manager should be used by the TSO if the site is a new lead. If checked, the site information would be shared with the ASM and the ASM would pass the lead to the concerned SO

STEP - 8

- After entering the Visit Details, Click on related or swipe left on the screen to find the Market Information Tab



←

Market Information
0 items

There are no records in this list.

+

New

MARKET INFORMATION

Units - Rs/Bag

Brand
Select Brand ▼

Product
Select Product ▼



BP
0


WSP
0

RSP
0

- Use the comments option to enter details about any branding activities of competitors
- Select the Brand and the Product from the list options and enter the price information for the corresponding brands
- Add row can be used to add price information of more brands
- Once the price information is entered, click on save button
- Use the back navigation button on the tab to go back to check-out page of the visit

- **STEP - 9**





Ravi Construction site
Ravi 29 May 2017

DETAILS

RELATED

Visit Name

Ravi Construction site Ravi 29 May 2017

Project Site/IHB Site

Ravi Construction site


Godown stock (MT) for composite Cement


If Potential Lead Share with Manager

☐

Construction Stage

Pre-Construction


Edit


Check-Out

Cancel

Check-Out

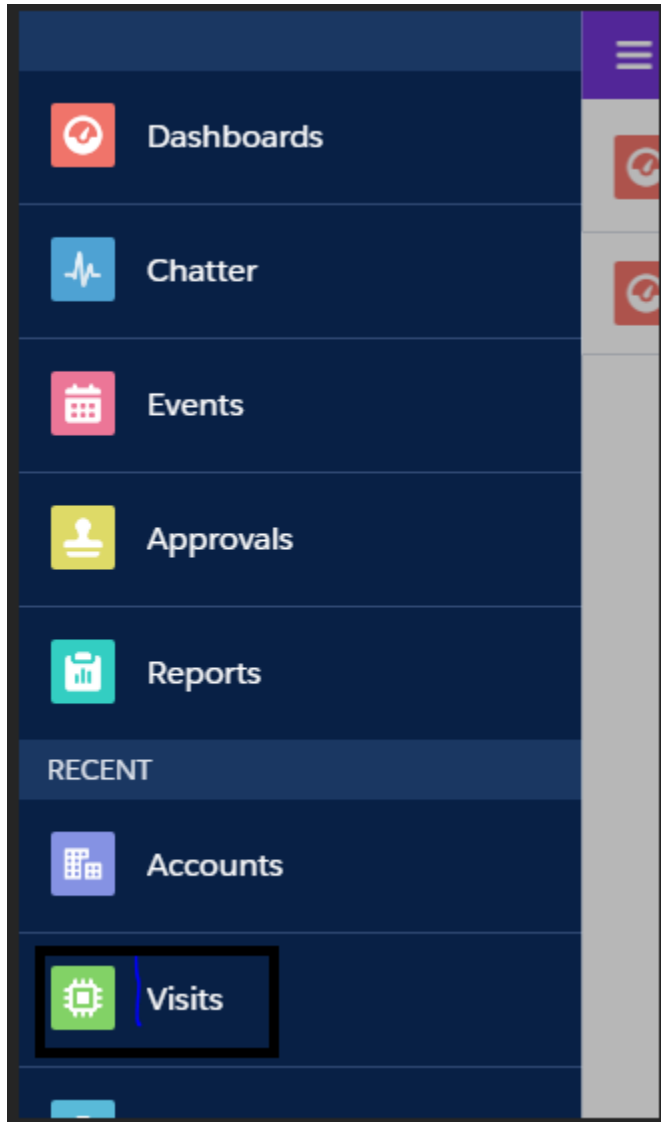
Save

Check Out

2017-02-23 08:51:36Z

Influencer VISITS FLOW

STEP - 1



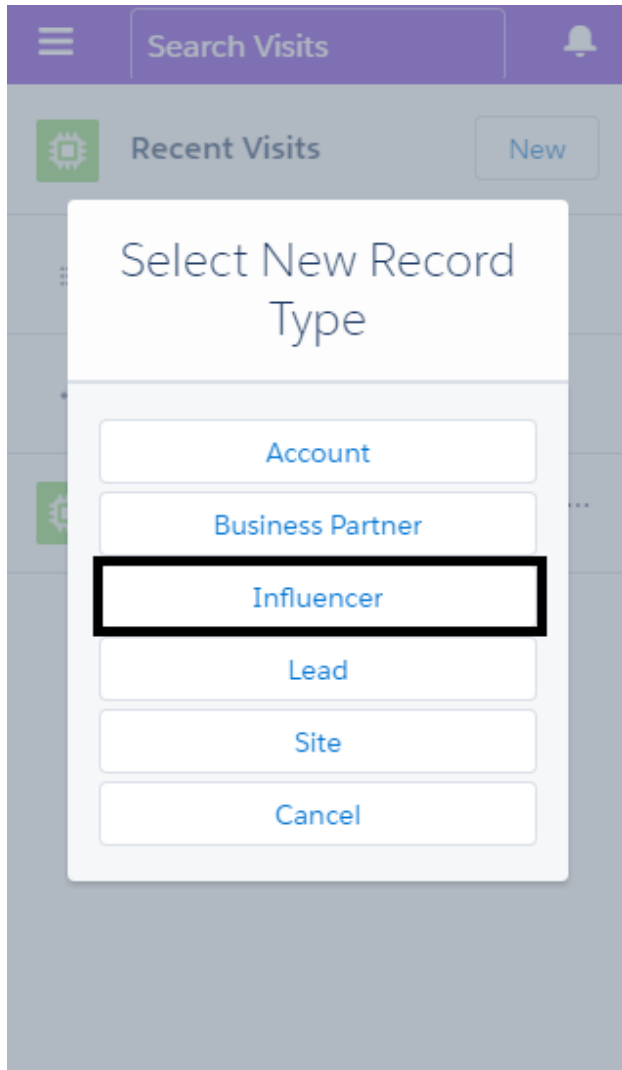
- Click on the Visit Tab

STEP - 2



- Click on New Button
- In case of Planned Visits, User can select any of the visits and proceed from Step - 5

STEP - 3



- Select the Appropriate type of Unplanned Visit which is being visited

NOTES:

1. Account is for Dealers, Non-Trade Parties
2. Depots is for Warehouses
3. Business Partners is for Sub-Dealers & Sales Promoters
4. Lead is for prospective Dealers & Non Trade Parties (Non JSW Dealers, , Non Cement Dealers, Non JSW Customers)
5. Site is for IHB & Project Sites
6. Influencers is for Engineers, Consultants, Architects, Builders

STEP - 4

Cancel Create Visit: I... Save

INFORMATION

Visit Name

Unplanned

Planned Date

Influencer

Parmeshappa X

Planned

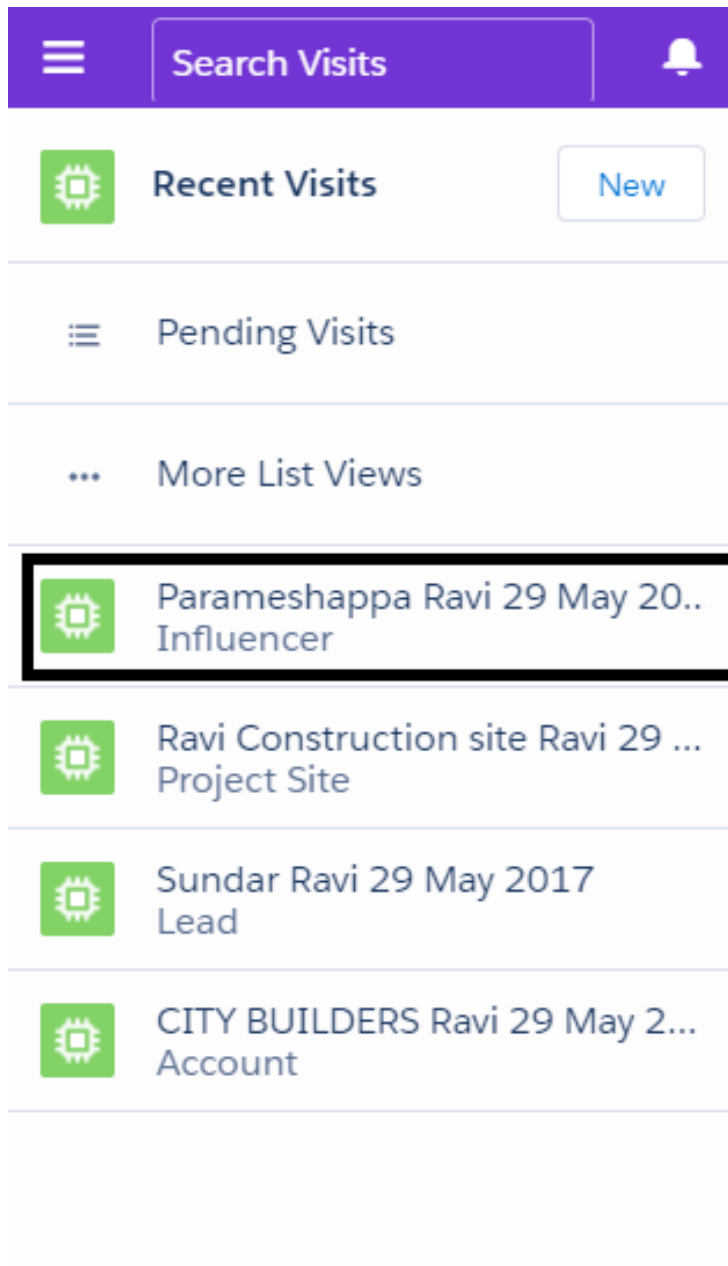
☐

- Enter the Visit name as “Unplanned”
- Type the name of the Site and click on search to select the account

- Once the Site is selected click on save button on the top left corner
- In the below fig,

“Parmeshwarappa” Influencer has been selected i.e this flow from here on will talk about an unplanned visit for “Parmeshwarappa” .

STEP - 5



- Once saved, click on the first visit to open the created visit

Note : Planned Visit Flow will be similar from here

STEP - 6

The screenshot shows a mobile application interface with a purple header bar containing a back arrow and a notification bell. Below the header, there is a green square icon with a white gear-like symbol, followed by the text "Parameshappa Ravi 29 May 2017". Underneath this, there are two tabs: "DETAILS" (which is selected and underlined) and "RELATED". The "DETAILS" tab contains the following information: "Visit Name" with the value "Parameshappa Ravi 29 May 2017", "Planned Date" with the value "29/5/2017", "Influencer" with the value "Parameshappa", and "Planned" with an unchecked checkbox. At the bottom of the screen, there is a button with a green circular icon containing a white gear-like symbol and the text "Check In" below it. The button is highlighted with a black rectangular border.

Visit Name
Parameshappa Ravi 29 May 2017

Planned Date
29/5/2017

Influencer
Parameshappa

Planned
<input type="checkbox"/>

Check In

- Once opened, click on the Check-In button at the bottom of the screen

STEP - 7

- Once checked-in, update the Visit report and save details as shown in the below figures

Cancel

Check In

Save

Account

Purpose of Visit

Details of the Visit

Project Site/IHB Site

Any image to be captured

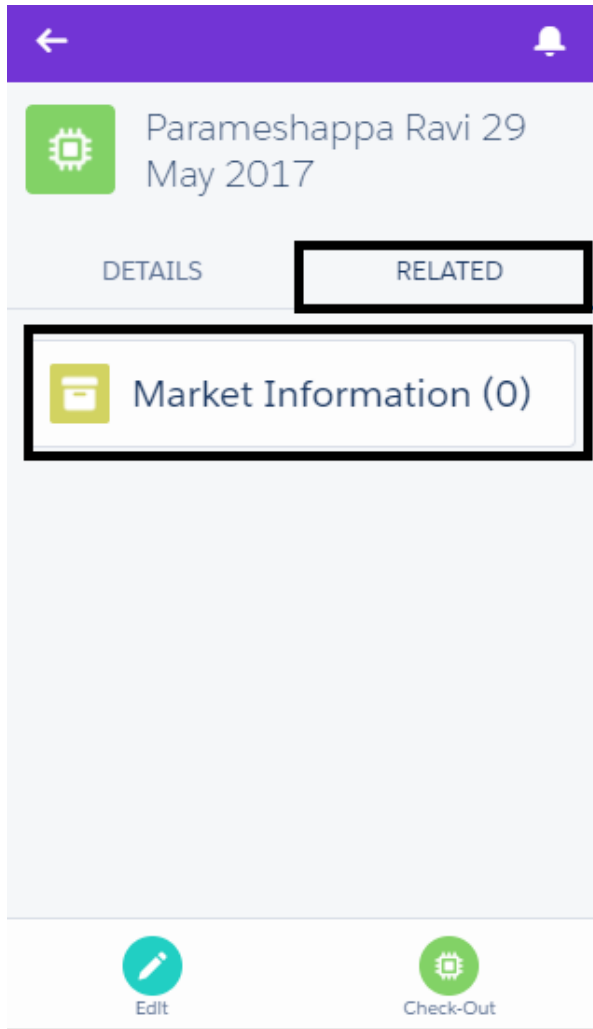
B

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STEP - 8

- After entering the Visit Details, Click on related or swipe left on the screen to find the Market Information Tab



Market Information
0 items

There are no records in this list.

New

MARKET INFORMATION

Units - Rs/Bag

Brand

Select Brand

Product

Select Product

BP

0

WSP



0


RSP

0

- Use the comments option to enter details about any branding activities of competitors
- Select the Brand and the Product from the list options and enter the price information for the corresponding brands
- Add row can be used to add price information of more brands
- Once the price information is entered, click on save button
- Use the back navigation button on the tab to go back to check-out page of the visit

• **STEP - 9**





Parameshappa Ravi 29 May 2017

DETAILS

RELATED

Visit Name

Parameshappa Ravi 29 May 2017

Influencer

Parameshappa

If Potential Lead Share with Manager


☐


Construction Stage

Type

Influencer

Planned Date

Edit

Check-Out

Cancel

Check-Out

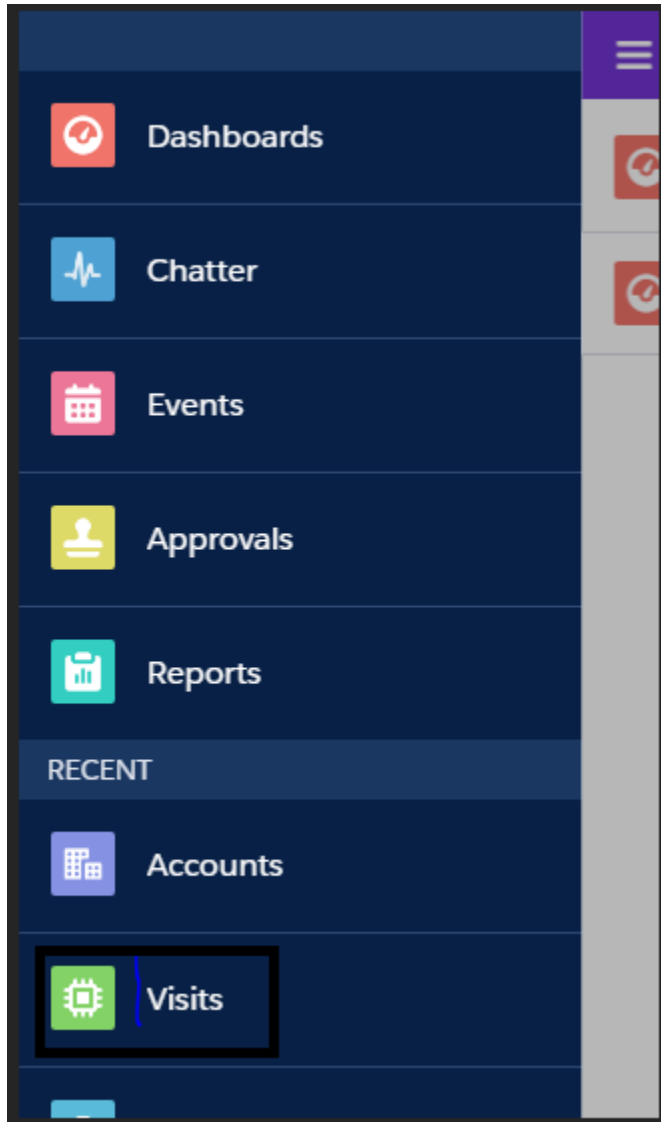
Save

Check Out

2017-02-23 08:51:36Z

Depot VISITS FLOW

STEP - 1



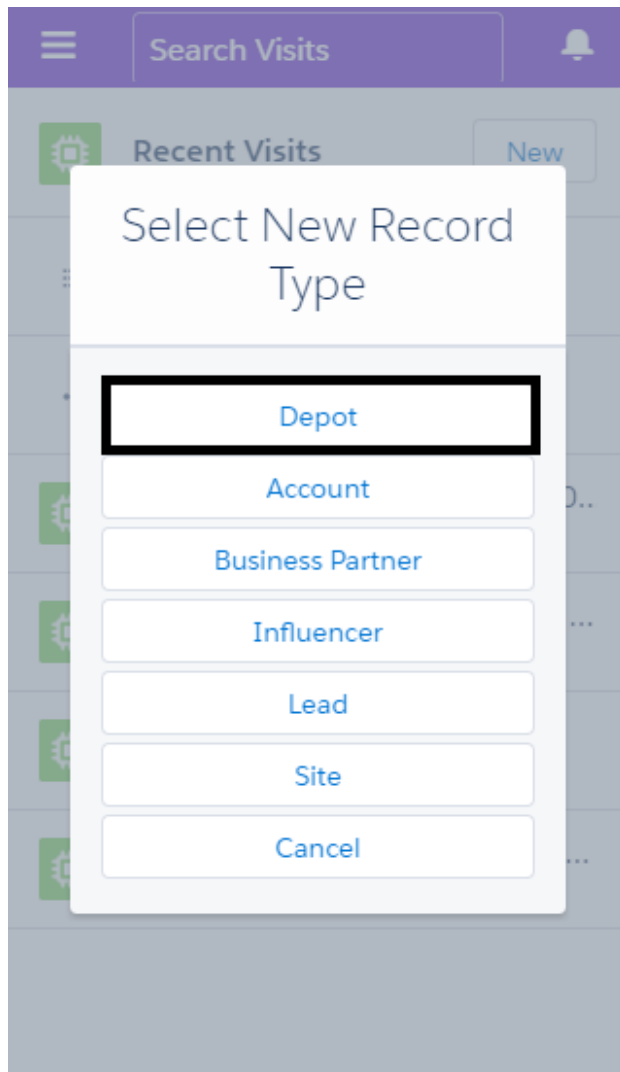
- Click on the Visit Tab

STEP - 2



- Click on New Button
- In case of Planned Visits, User can select any of the visits and proceed from Step - 5

STEP - 3



- Select the Appropriate type of Unplanned Visit which is being visited

NOTES:

1. Account is for Dealers, Non-Trade Parties
2. Depots is for Warehouses
3. Business Partners is for Sub-Dealers & Sales Promoters
4. Lead is for prospective Dealers & Non Trade Parties (Non JSW Dealers, , Non Cement Dealers, Non JSW Customers)
5. Site is for IHB & Project Sites
6. Influencers is for Engineers, Consultants, Architects, Builders

STEP - 4

Create Visit: D..

INFORMATION

* Visit Name

Unplanned

Planned Date

* Depot

JSW CEMENT LTD-ANANTAPUI X

Planned

☐

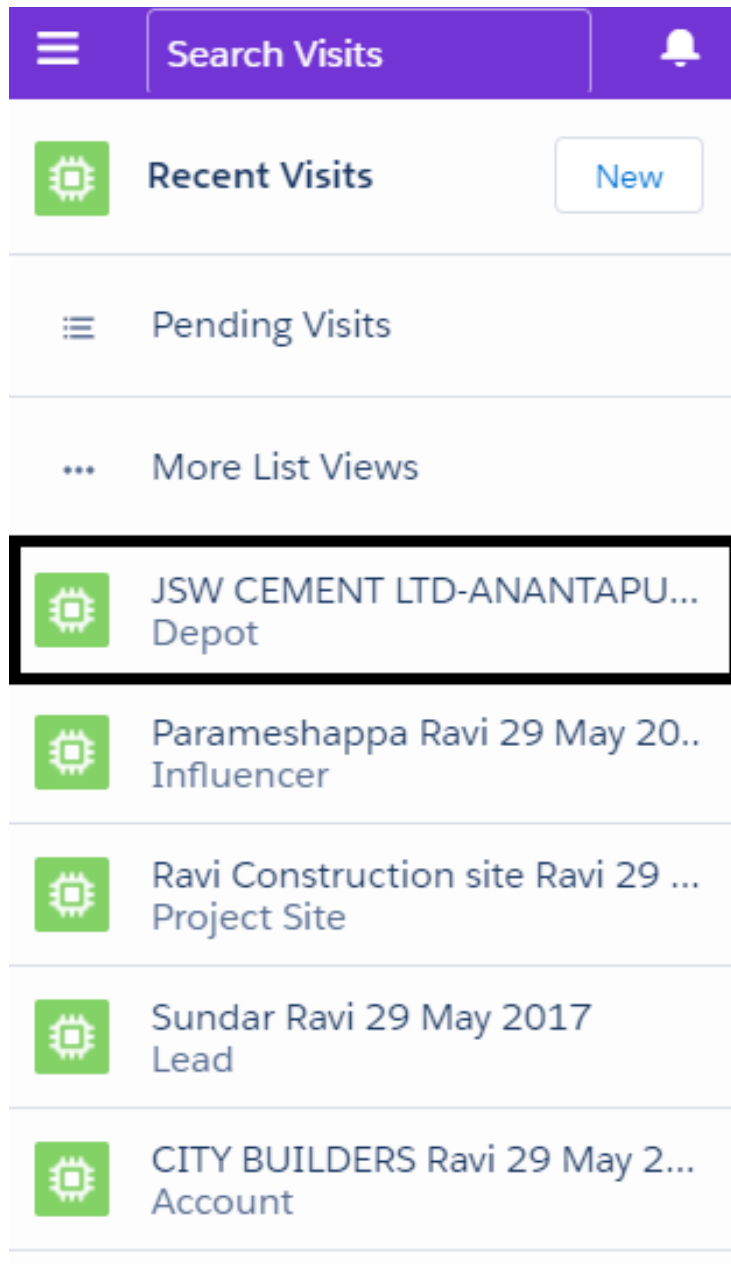
- Enter the Visit name as “Unplanned”

- Type the name of the Site and click on search to select the account

- Once the Site is selected click on save button on the top left corner

- In the below fig, “JSW Anantapur” Depot has been selected i.e this flow from here on will talk about an unplanned visit for “JSW Anantapur” Depot .

STEP - 5



- Once saved, click on the first visit to open the created visit

Note : Planned Visit Flow will be similar from here

STEP - 6

The screenshot shows a mobile application interface with a purple header bar containing a back arrow and a bell icon. Below the header, there is a green square icon with a white gear-like symbol. To the right of this icon, the text reads "JSW CEMENT LTD-ANANTAPUR Ravi 29 May 2017". Below this, there are two tabs: "DETAILS" (which is selected and underlined) and "RELATED". The "DETAILS" tab contains the following information: "Visit Name" followed by "JSW CEMENT LTD-ANANTAPUR Ravi 29 May 2017", "Planned Date" followed by "29/5/2017", "Depot" followed by "JSW CEMENT LTD-ANANTAPUR", and "Planned" followed by an unchecked checkbox. At the bottom of the screen, there is a green square icon with a white gear-like symbol, which is highlighted with a black border, and the text "Check In" below it.

JSW CEMENT LTD-ANANTAPUR Ravi 29 May 2017

DETAILS RELATED

Visit Name
JSW CEMENT LTD-ANANTAPUR Ravi 29 May 2017

Planned Date
29/5/2017

Depot
JSW CEMENT LTD-ANANTAPUR

Planned
☐

Check In

- Once opened, click on the Check-In button at the bottom of the screen

STEP - 7

- Once checked-in, update the Visit report and save details as shown in the below figures

Cancel

Check In

Save

Date of Inspection

05/29/2017

Previous Inspection

mm/dd/yyyy

* Product Type

--None--
PSC
CHD
CCC

* Godown stock (MT) for PSC

Godown Stock as on Month end
* (MT) for PS

* Damage Stock Ageing for PSC

mm/dd/yyyy

Cancel

Check In

Save

* Damaged Cement (MT) for PSC

* Good Stock Ageing for PSC

mm/dd/yyyy

* Godown stock (MT) for CHD

Godown Stock as Month end (MT)
* for CHD

* Damaged Cement (MT) for CHD

* Damage Stock Ageing for CHD

mm/dd/yyyy

* Good Stock Ageing for CHD

Cancel

Check In

Save

* Godown stock (MT) for OPC

Godown Stock on Month end (MT)

* for OPC

* Damaged Cement (MT) for OPC

* Damage Stock Ageing for OPC

mm / dd / yyyy

* Good Stock Ageing for OPC

mm / dd / yyyy

Godown stock (MT) for composite

* Cement

Godown Stock on Month end

Cancel

Check In

Save

mm / dd / yyyy

* Good Stock Ageing for CC

mm / dd / yyyy

Segregation of good & damaged

* cement

--None--

* Stacking pattern (As per ISP?)

--None--

* Condition of Godown

--None--

F.I-F.O movement

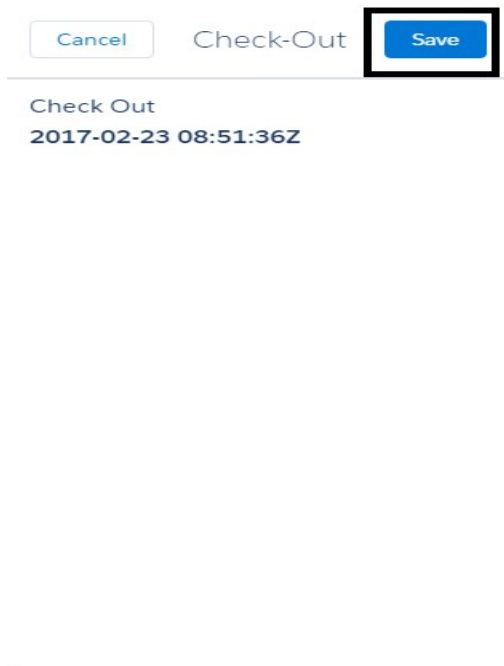
--None--

Remarks

--None--

STEP - 9

- After completing the visit report please click on check out and Save at the top right corner



Cancel Check-Out Save

Check Out
2017-02-23 08:51:36Z