Distributor Appointment Portal

Vijay Pawase

Distributor Appointment Portal

Our objectives for client aimed to transform their customer onboarding. We sought to slash the onboarding time from 30 days to minimum days. Shift communication from emails to a centralized platform for efficiency. Implement a structured validation process by department, and simplify document submission with a user-friendly interface. These goals collectively streamlined operations, fostering a quicker, transparent, and more user-centric onboarding experience.

Vijay Pawase

Project:	DAP
Role:	UI-UX Designer
Duration:	6 Weeks
Task:	Application Design & Development

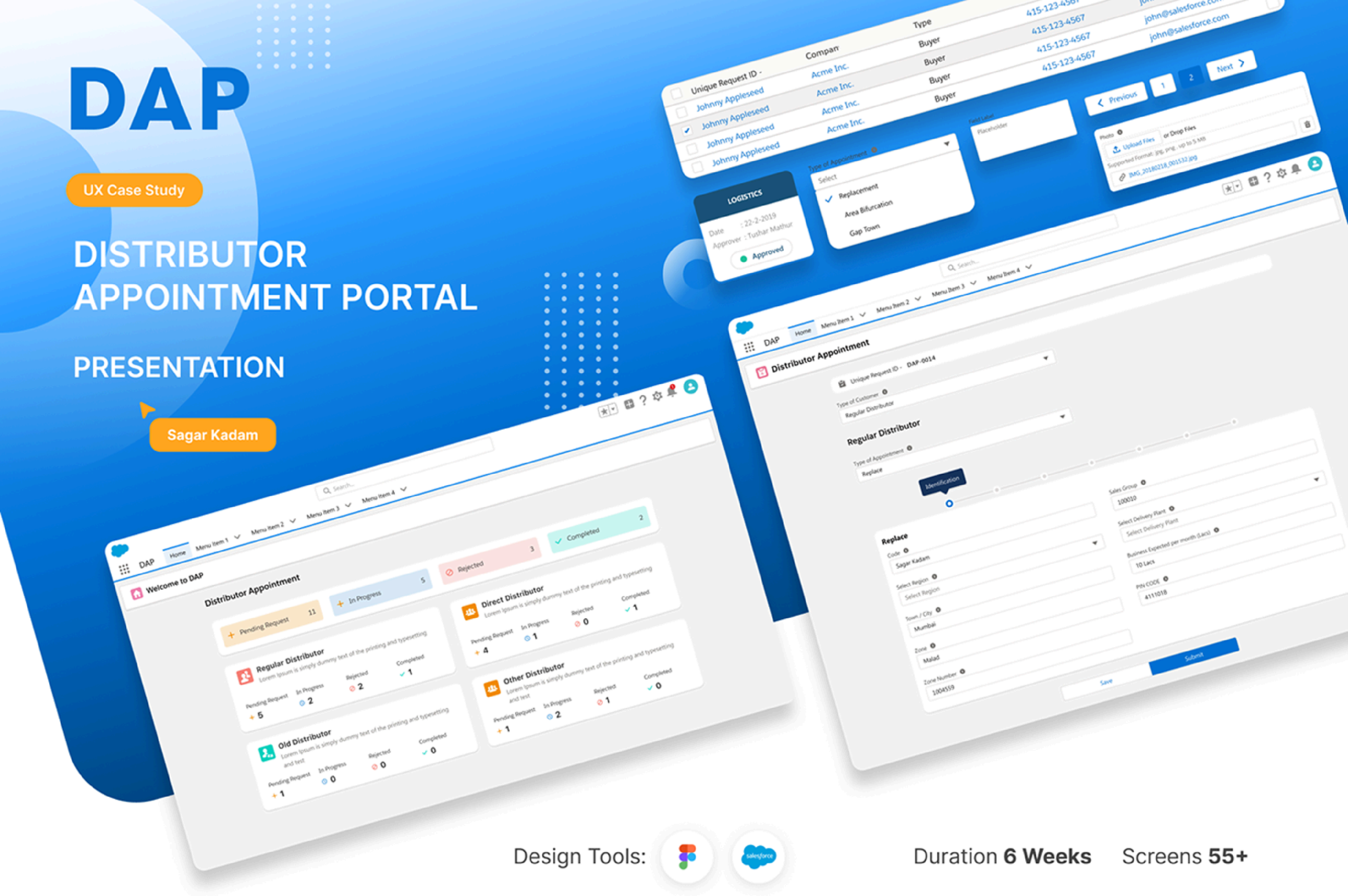
DAP

UX Case Study

DISTRIBUTOR APPOINTMENT PORTAL

PRESENTATION

Sagar Kadam



Design Tools:

Duration **6 Weeks**

Screens **55+**

Introduction

This client in the adhesive and industrial chemicals industry, faced significant challenges in their customer onboarding process. It typically took them a lengthy 30 days to appoint a distributor onto their customer appointment portal.
This process involved seven distinct departmental validation stages and the submission and review of over 40+ documents via email. To streamline and optimize this cumbersome process, I implemented a custom User Experience (UX) design on the Salesforce platform.

Problem Statement

Clinet struggled with a time-consuming and inefficient customer onboarding process by the following issues:

Lengthy Processing Time
It took a month to onboard a distributor due to manual document submission and approval stages.

Email-Based Communication
The process relied heavily on email, leading to potential errors, delays, and a lack of transparency.

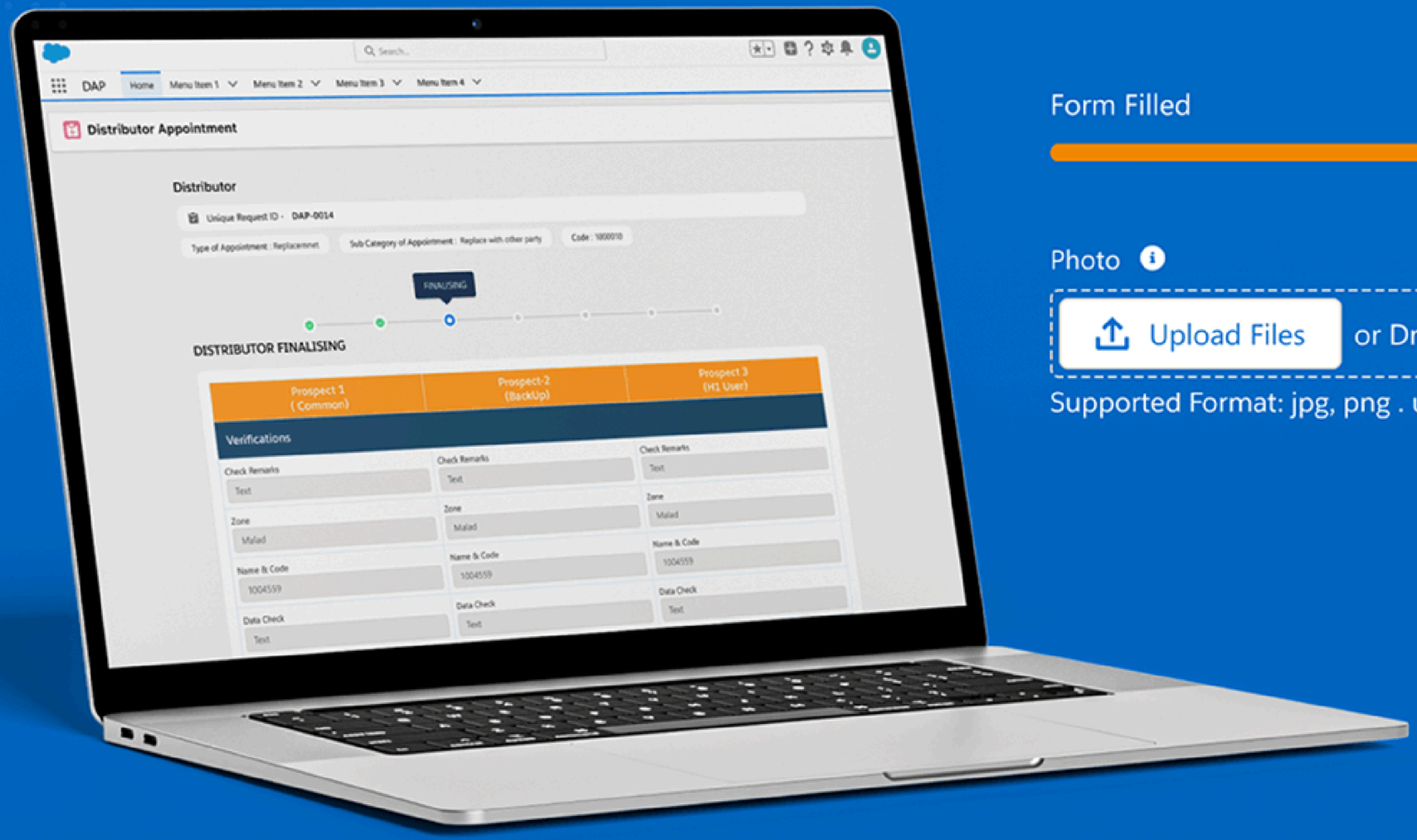
Complex Validation
7 different departments had to validate documents, making coordination challenging.

Document Overload
Over 40+ documents needed to be submitted, adding complexity and room for errors.

Objectives

Our objectives for client aimed to transform their customer onboarding. We sought to slash the onboarding time from 30 days to minimum days. Shift communication from emails to a centralized platform for efficiency. Implement a structured validation process by department, and simplify document submission with a user-friendly interface. These goals collectively streamlined operations, fostering a quicker, transparent, and more user-centric onboarding experience.

DOCUMENTATION



Form Filled 50%

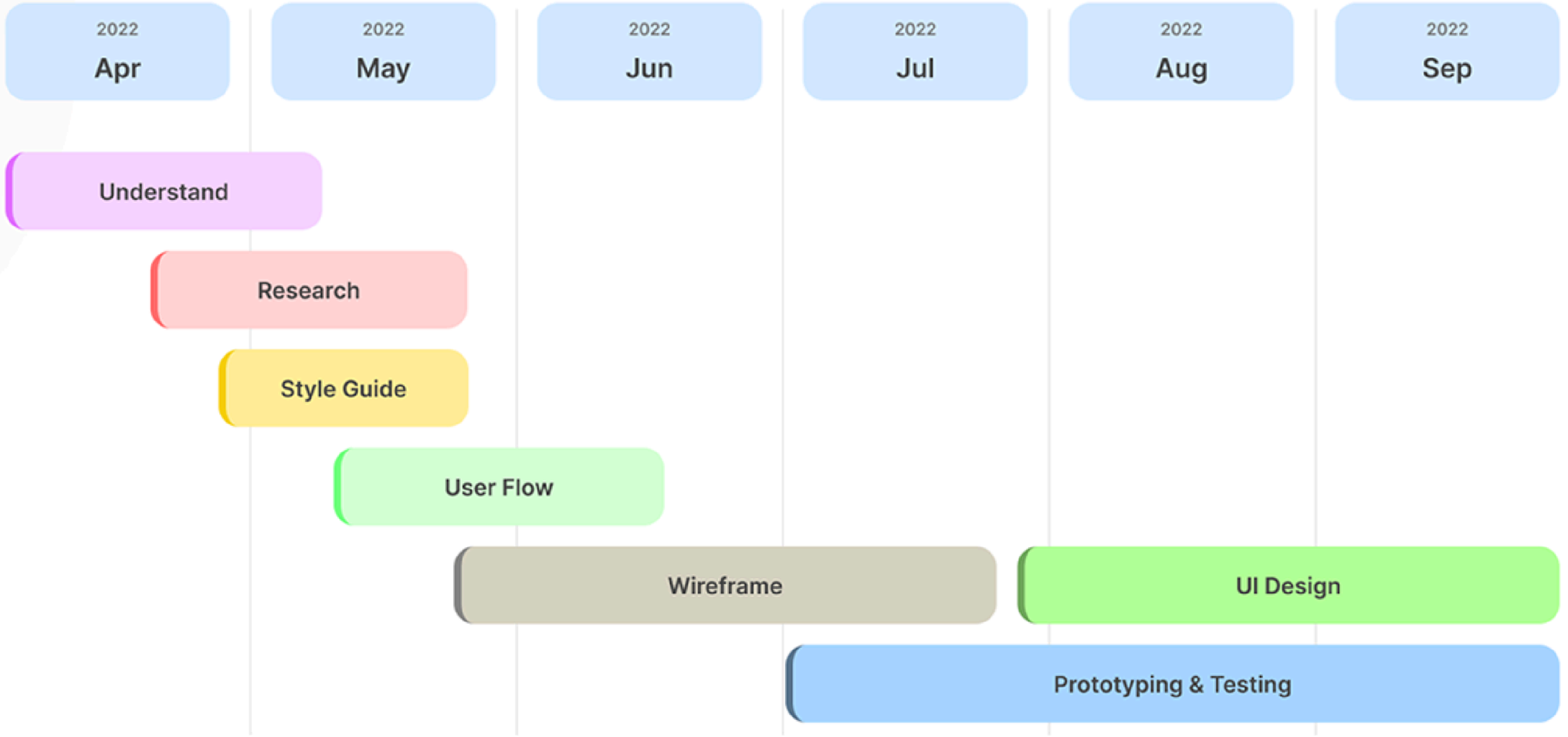
Photo

Upload Files or Drop Files

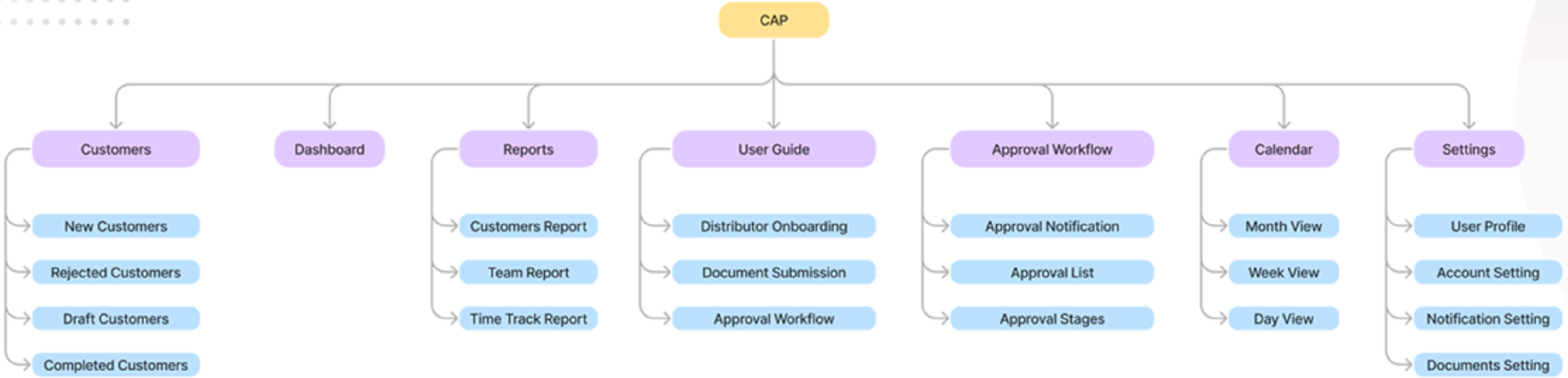
Supported Format: jpg, png . up to 5 MB

PROJECT TIMELINE

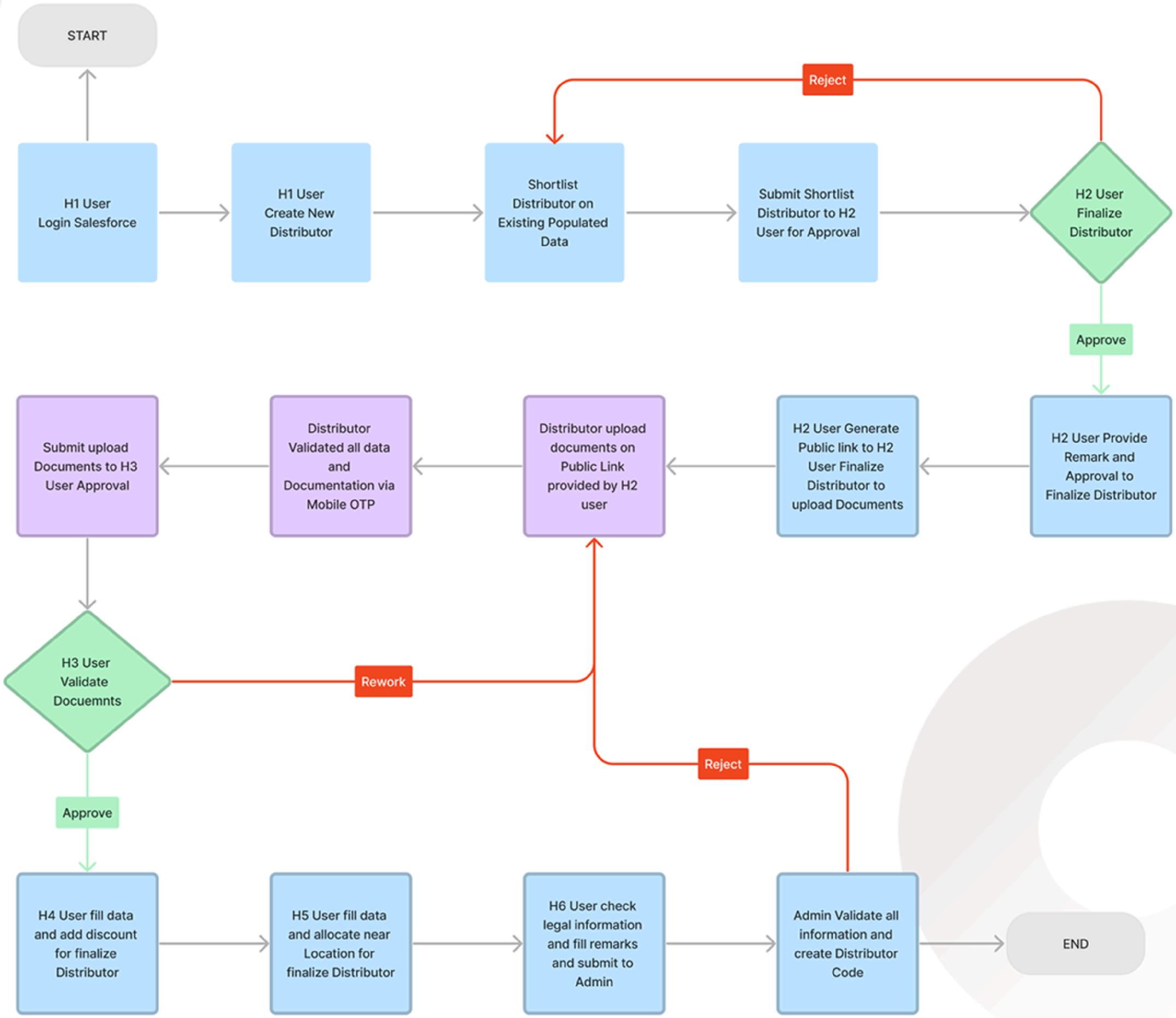
Overview



Site Map

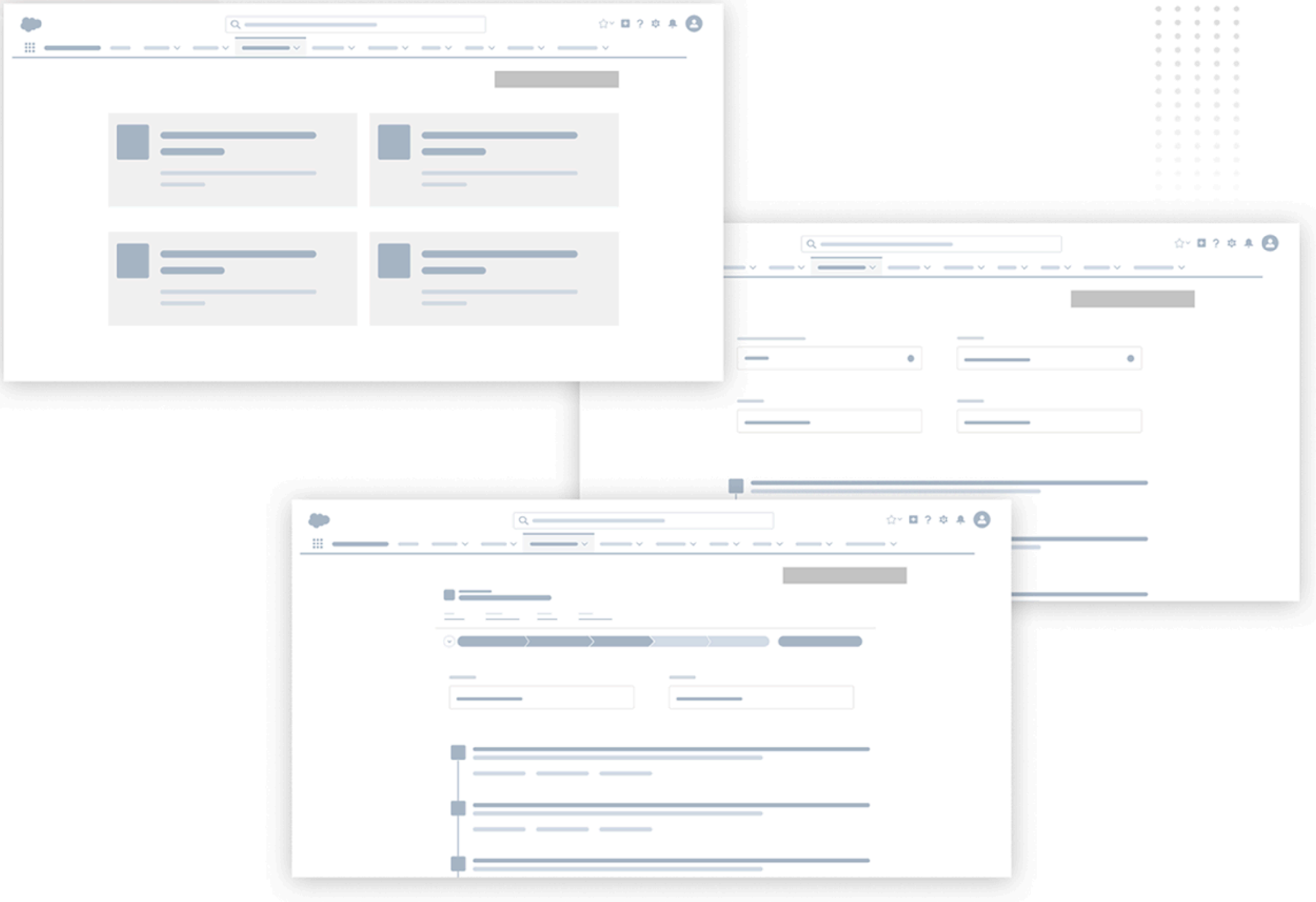

CAP
Customers
New Customers
Rejected Customers
Draft Customers
Completed Customers
Dashboard
Reports
Customers Report
Team Report
Time Track Report
User Guide
Distributor Onboarding
Document Submission
Approval Workflow
Approval Workflow
Approval Notification
Approval List
Approval Stages
Calendar
Month View
Week View
Day View
Settings
User Profile
Account Setting
Notification Setting
Documents Setting

User Flow


START
H1 User Login Salesforce
H1 User Create New Distributor
Shortlist Distributor on Existing Populated Data
Submit Shortlist Distributor to H2 User for Approval
H2 User Finalize Distributor
Reject
Approve
H2 User Provide Remark and Approval to Finalize Distributor
H2 User Generate Public link to H2 User Finalize Distributor to upload Documents
Distributor upload documents on Public Link provided by H2 user
Distributor Validated all data and Documentation via Mobile OTP
Submit upload Documents to H3 User Approval
H3 User Validate Docuemnts
Rework
Reject
Approve
H4 User fill data and add discount for finalize Distributor
H5 User fill data and allocate near Location for finalize Distributor
H6 User check legal information and fill remarks and submit to Admin
Admin Validate all information and create Distributor Code
END

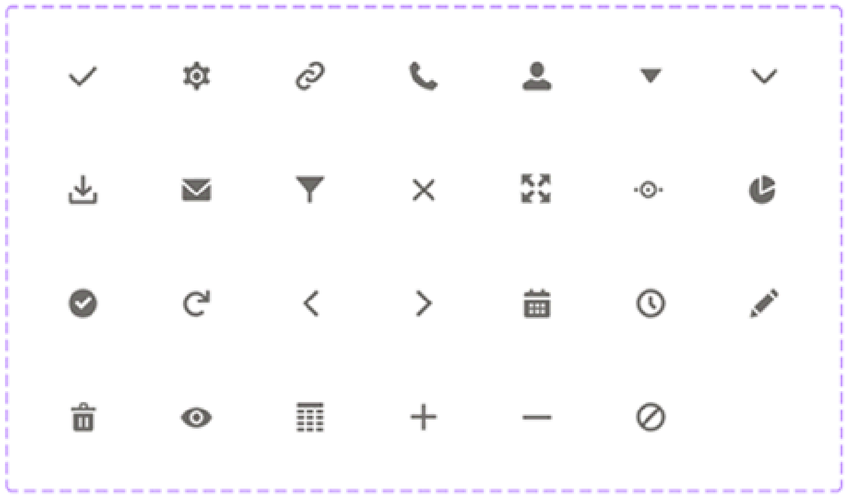
WIREFRAME

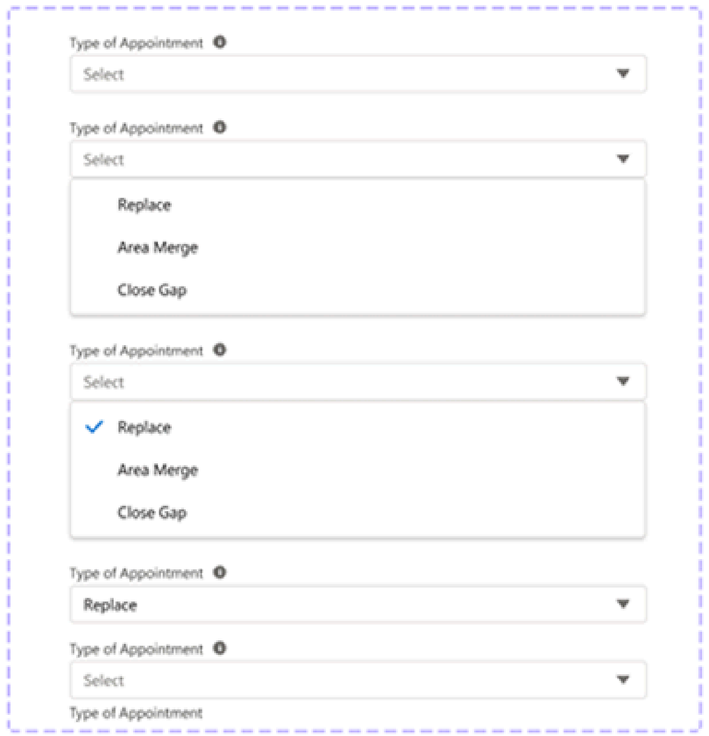
Low-Fidelity

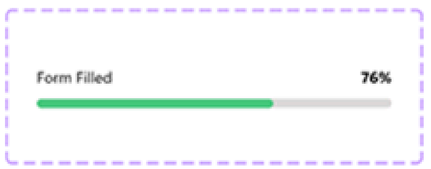


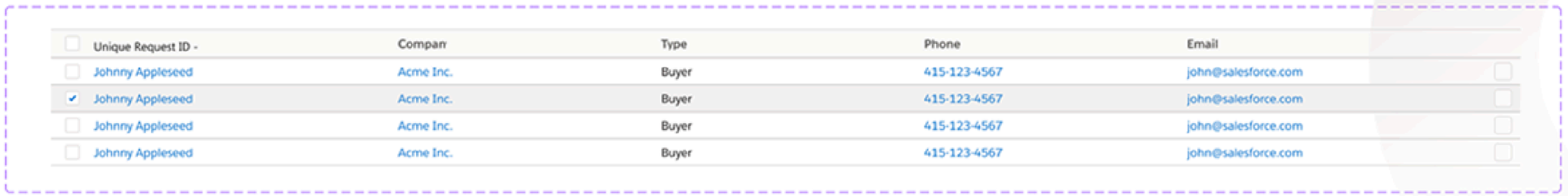
DESIGN SYSTEM

Figma Components









Unique Request ID -	Compan	Type	Phone	Email
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Johnny Appleseed	Acme Inc.	Buyer	415-123-4567	john@salesforce.com
Johnny Appleseed	Acme Inc.	Buyer	415-123-4567	john@salesforce.com
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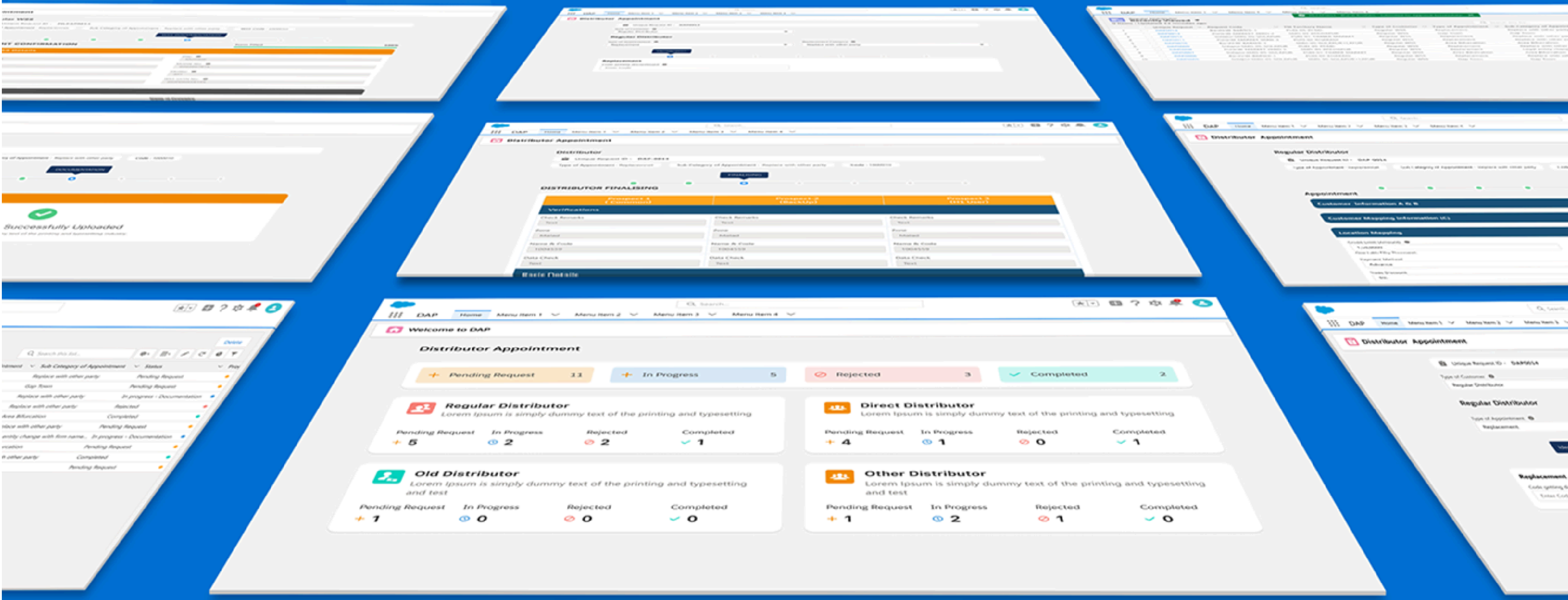
High-Fidelity