Sales Channel– DSM Quick Start

Version 5.1

Amshuhu iTech Solution Pvt. Ltd
Vendor

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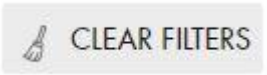
Initial Setup

- Super User Account will be initially created by the Amshuhu Support team.
- Super User (DSM) will receive welcome mail with login credentials.
- Super User (DSM) can login to the web tool (https://shell.isteer.co) with the provided credentials.

- Click to Add New
- Click to Edit
- Shows available filters

- Click to Clear Filters 

Please note: After logging in for the first time, user is asked to reset the password for security purpose.

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Initial Setup

- Click to Search
- Click to Assign Branch
- Click to Assign Roles
- Click to Sort
- Click to See more
- Click to set status
  - Active status
  - Inactive status

- Click to download
- Download Excel or PDF

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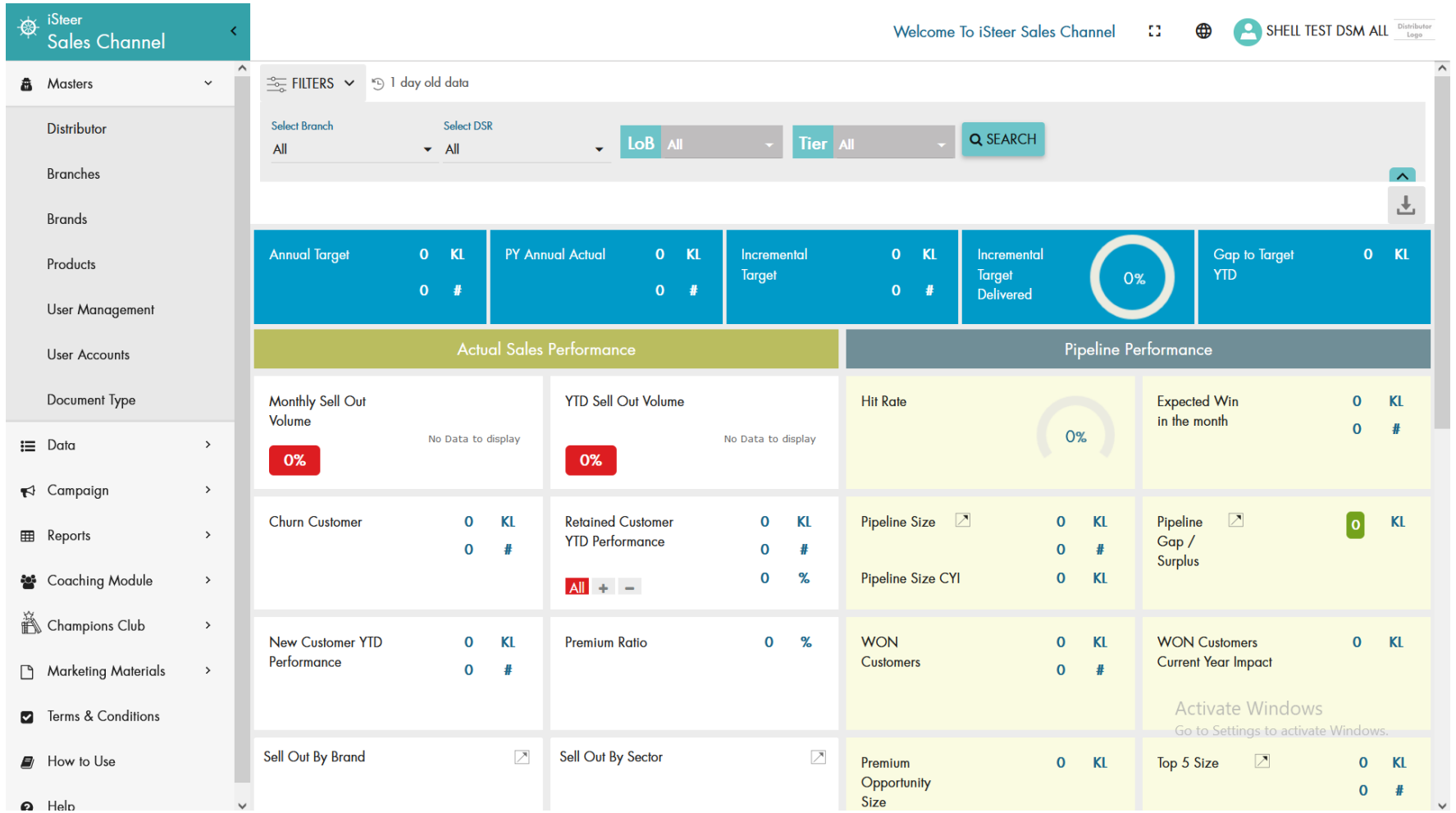
Dashboard



Notes:

- DSM can view the dashboard to see all the KPI calculations.
- In the New, Dashboard users can view both Pipeline Performance and Actual Sales.
- DSM can filter based on branch, DSR, LoB and Tier.

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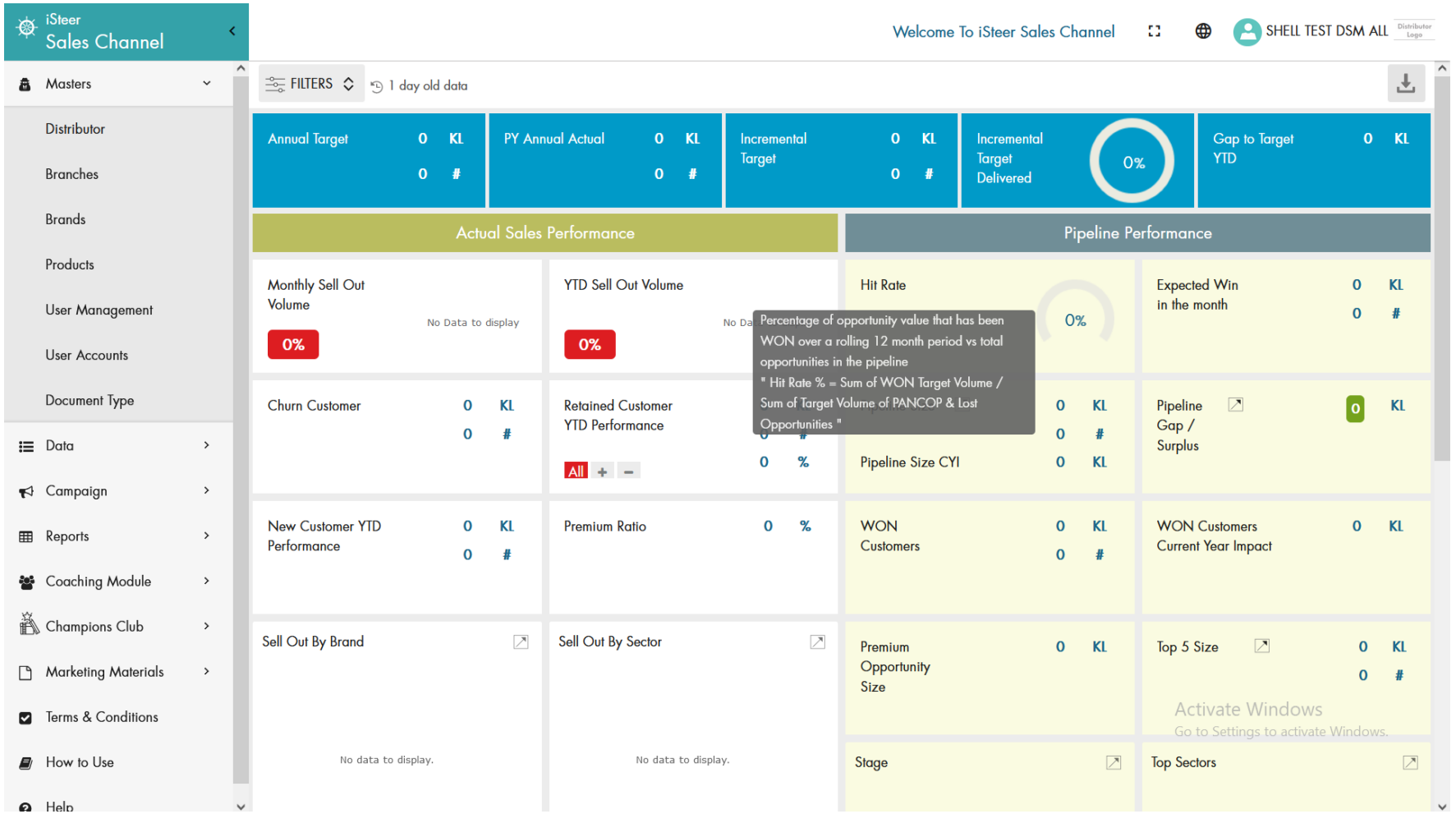
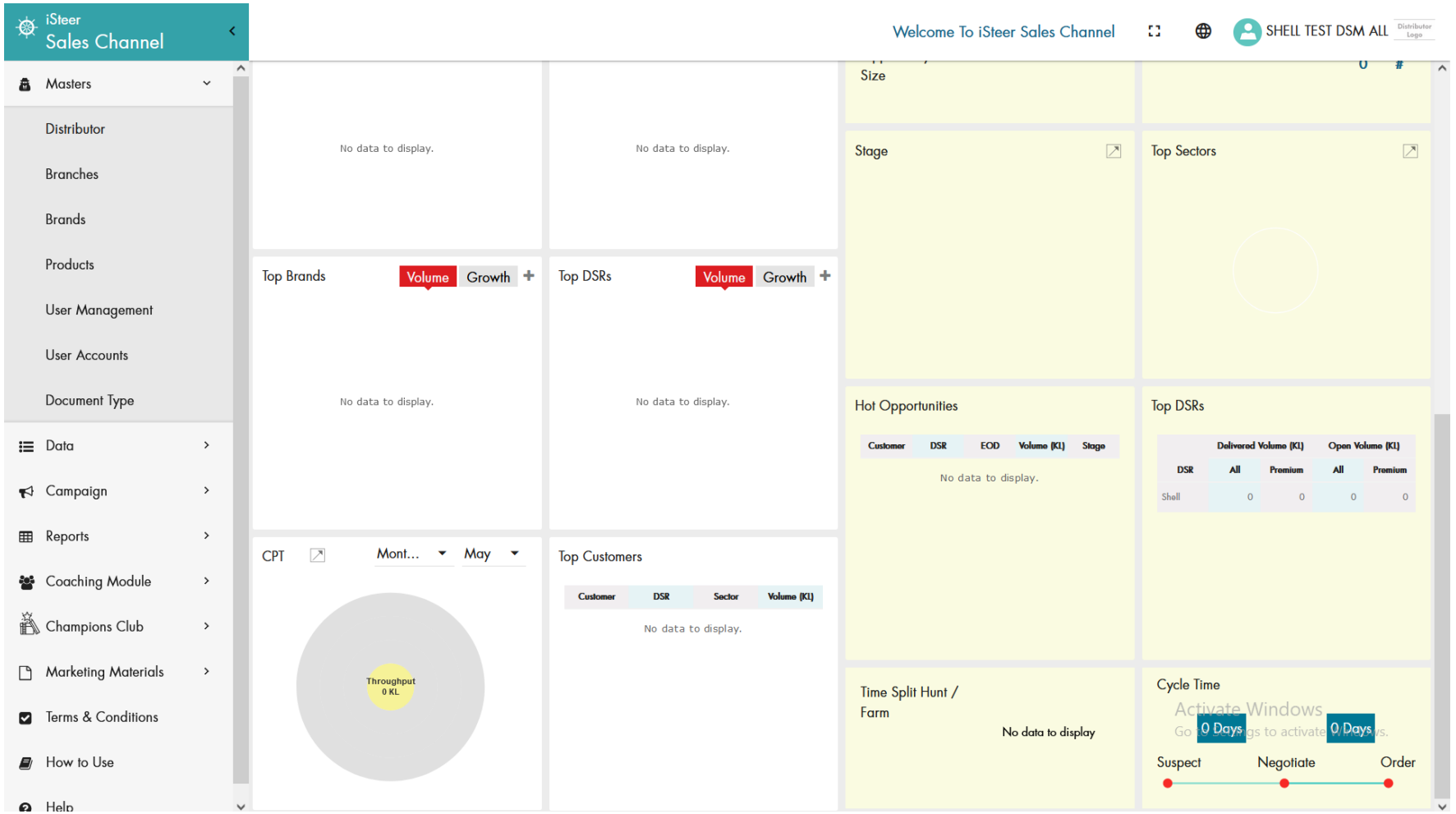
Dashboard



Notes:

- DSM can place the mouse over on the name of a KPI, the user can view the formulas for a particular KPI.

Dashboard



Notes:

- In Hot Opportunities the opportunities that are close to the Estimated Order Date will be displayed.

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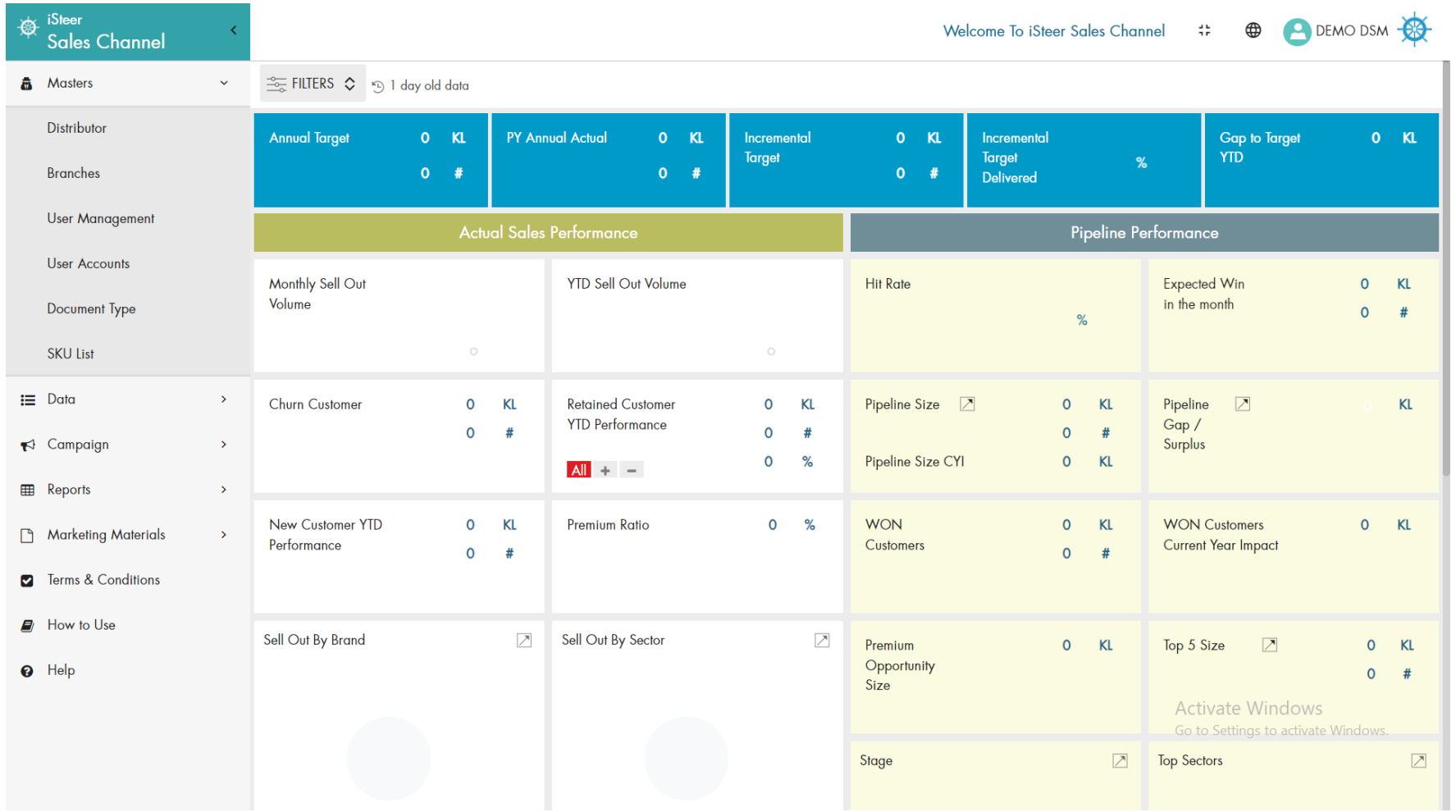
Dashboard



Notes:

- DSM can click the arrow and the page is redirected to the particular report of the page.
- E.g. If the user click the arrow next to Pipeline Size, the page redirects to the Pipeline Dashboard.
- Drill-through is also available for following KPI's Pipeline Gap, Top 5, Stage, Top Sectors, Sell out by brand, Sell out by sectors, and CPT.

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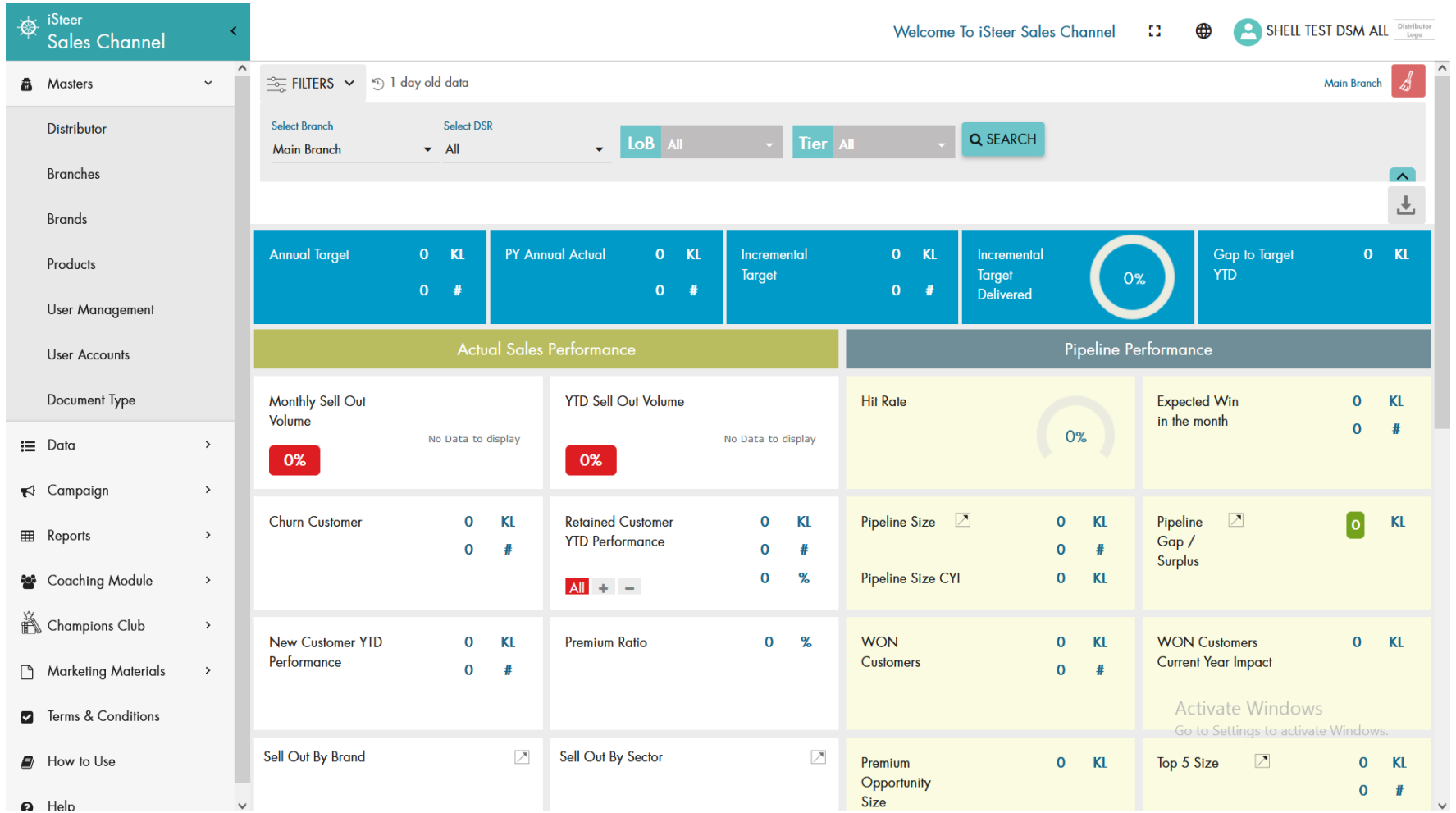
Dashboard



Notes:

- If the user select a filter on the main dashboard, the system will apply that filter to all report pages.
- Based on user role, filters may vary.
- The smart filter will be available until the user clear the filters.
- E.g. If the user select a branch as the main branch, The data will be displayed for the Main Branch in Reports wherever the branch filter is available.

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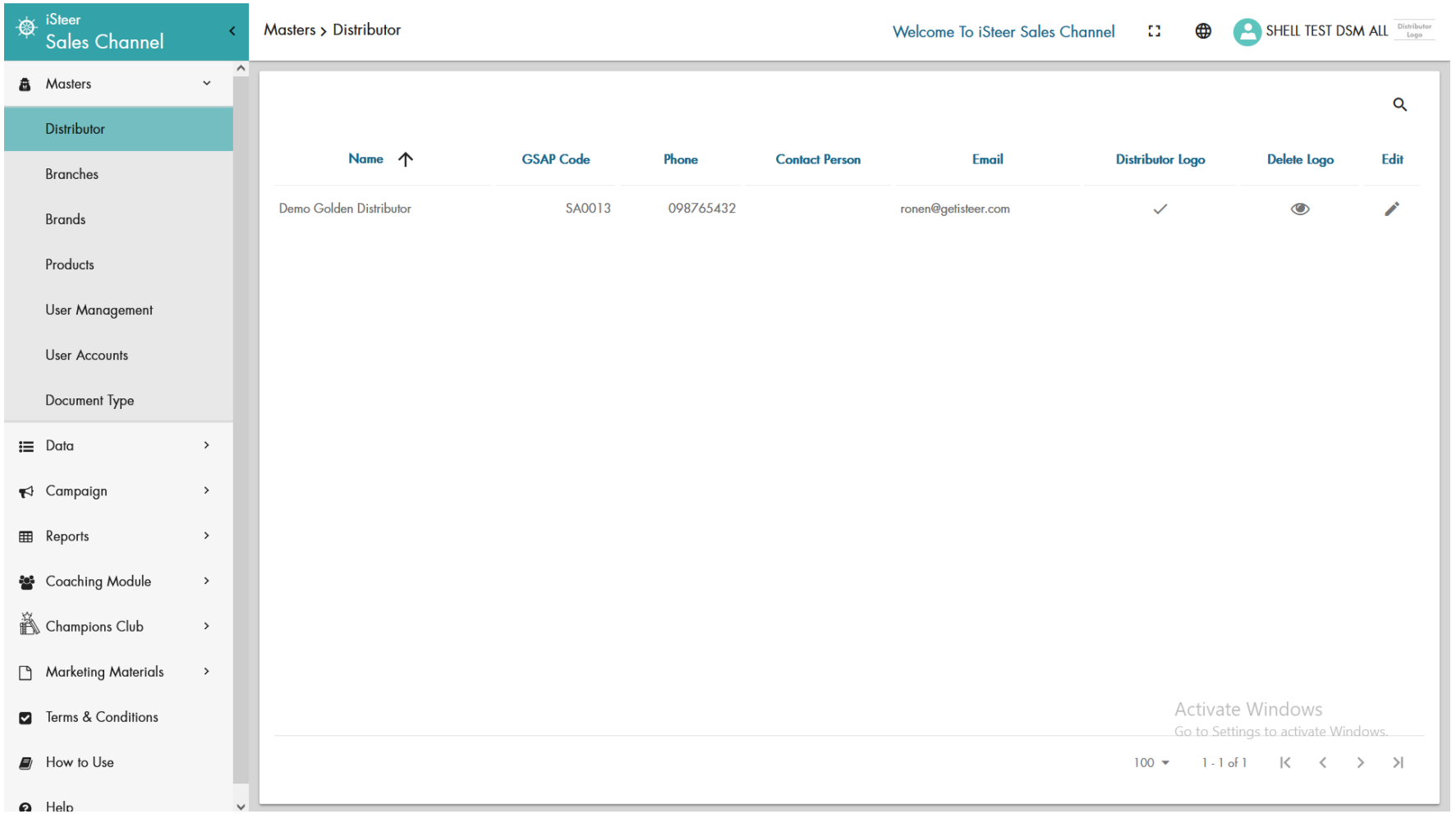
Masters : Distributor



Notes:

- DSM can edit basic information here.
- DSM can upload the distributor logo.
- DSM can also edit or delete the logo. As required for Site Assessment Users.

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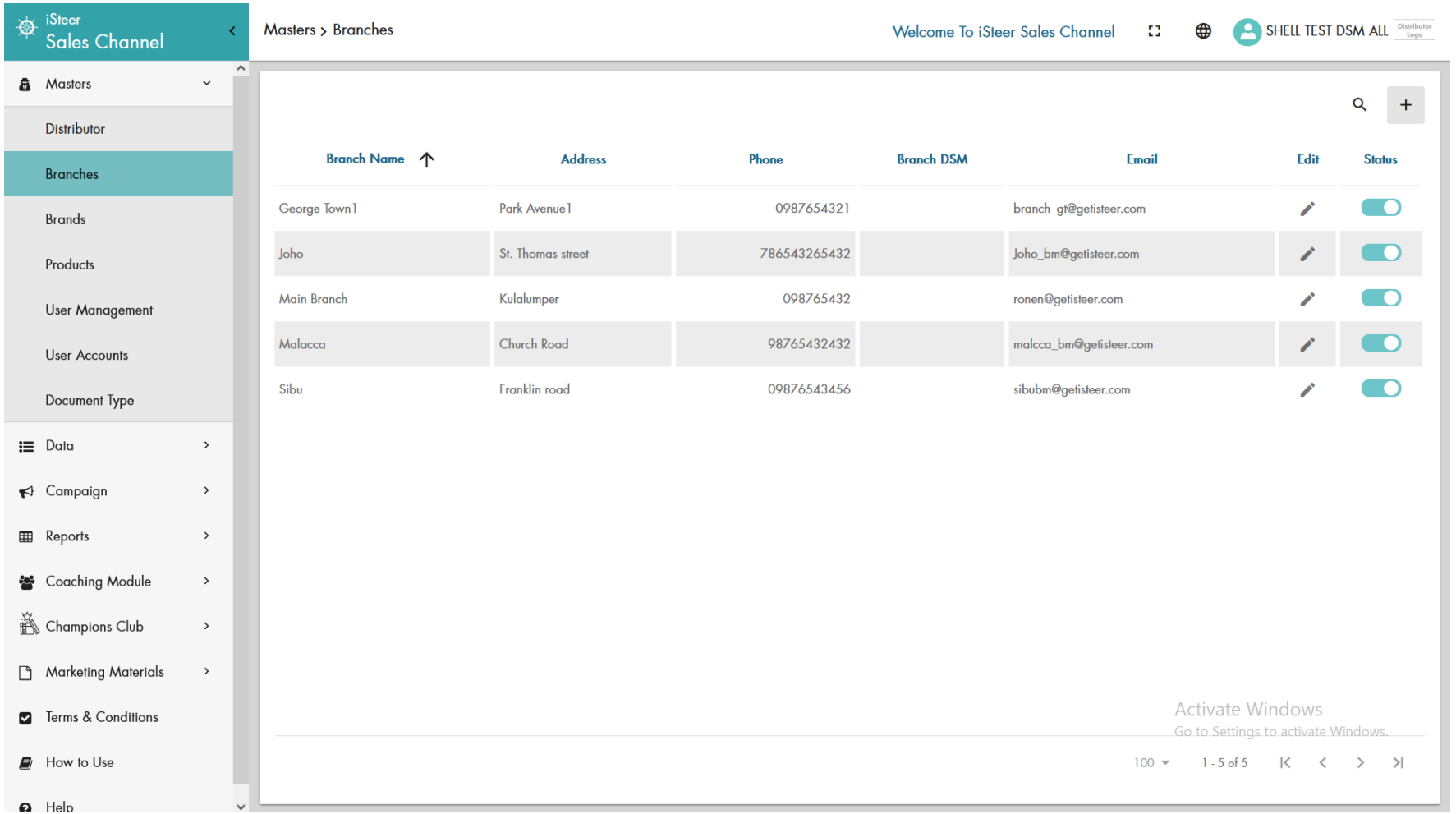
Masters : Branches



Notes:

- DSM can create new branches by clicking the "add" icon and entering the valid details.
- DSM can also edit the branches.
- DSM can set the status of branches to active or inactive.

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Masters : Branches

Notes:

- DSM can create new branches by clicking the “add” icon and entering the valid details.
- DSM can also edit the branches.
- DSM can set the status of branches to active or inactive.

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Masters : Branches

Notes:

- DSM can create new branches by clicking the “add” icon and entering the valid details.
- DSM can also edit the branches.
- DSM can set the status of branches to active or inactive.

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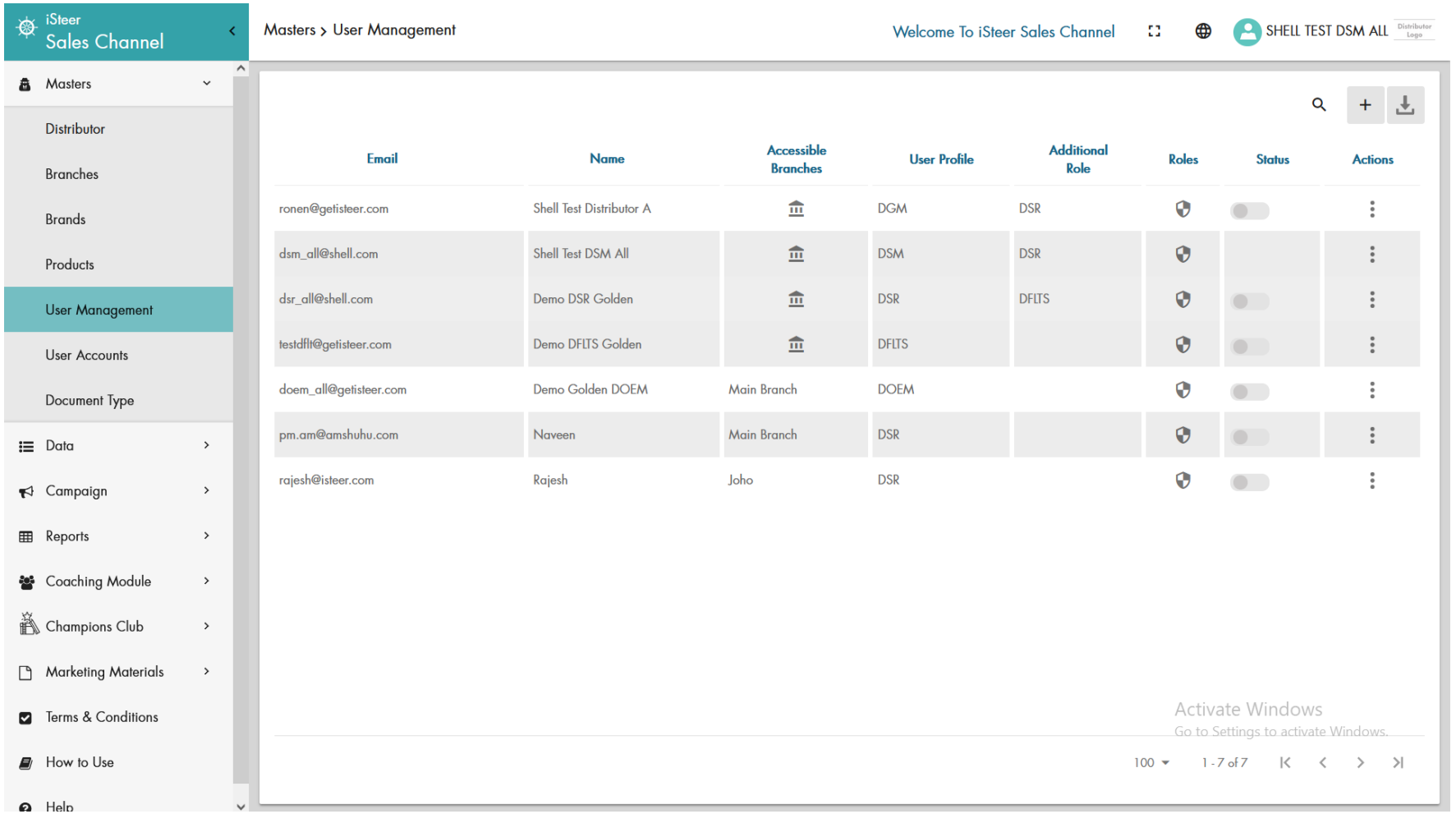
Masters : User Management



Notes:

- DSM can view, add, edit, or delete the user from this page and also can add users by clicking the "Add" icon on the Upper right corner.
- DSM can also enable or disable the users by clicking the status button under the column Status.
- DSM can delete any user by clicking the dot icon under the Action column.
- DSM can set roles for a user and can also change the password for the user here.
- DSM can assign branches to users.

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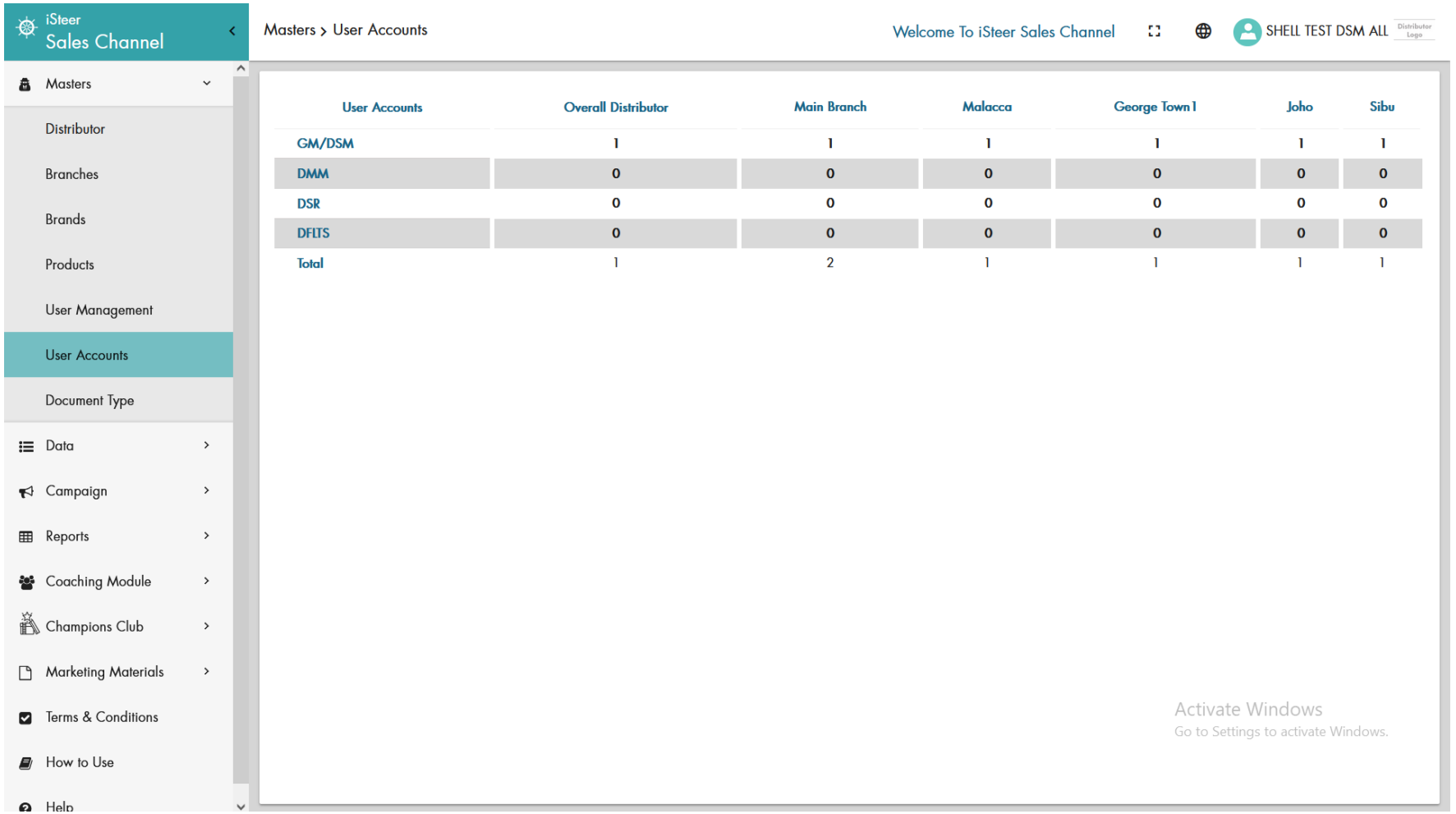
Masters : User Accounts



User Accounts	Overall Distributor	Main Branch	Malacca	George Town1	Joho	Sibu
GM/DSM	1	1	1	1	1	1
DMM	0	0	0	0	0	0
DSR	0	0	0	0	0	0
DFLTS	0	0	0	0	0	0
Total	1	2	1	1	1	1

Notes:

- DSM can view the type of users available and their total count will be available here.

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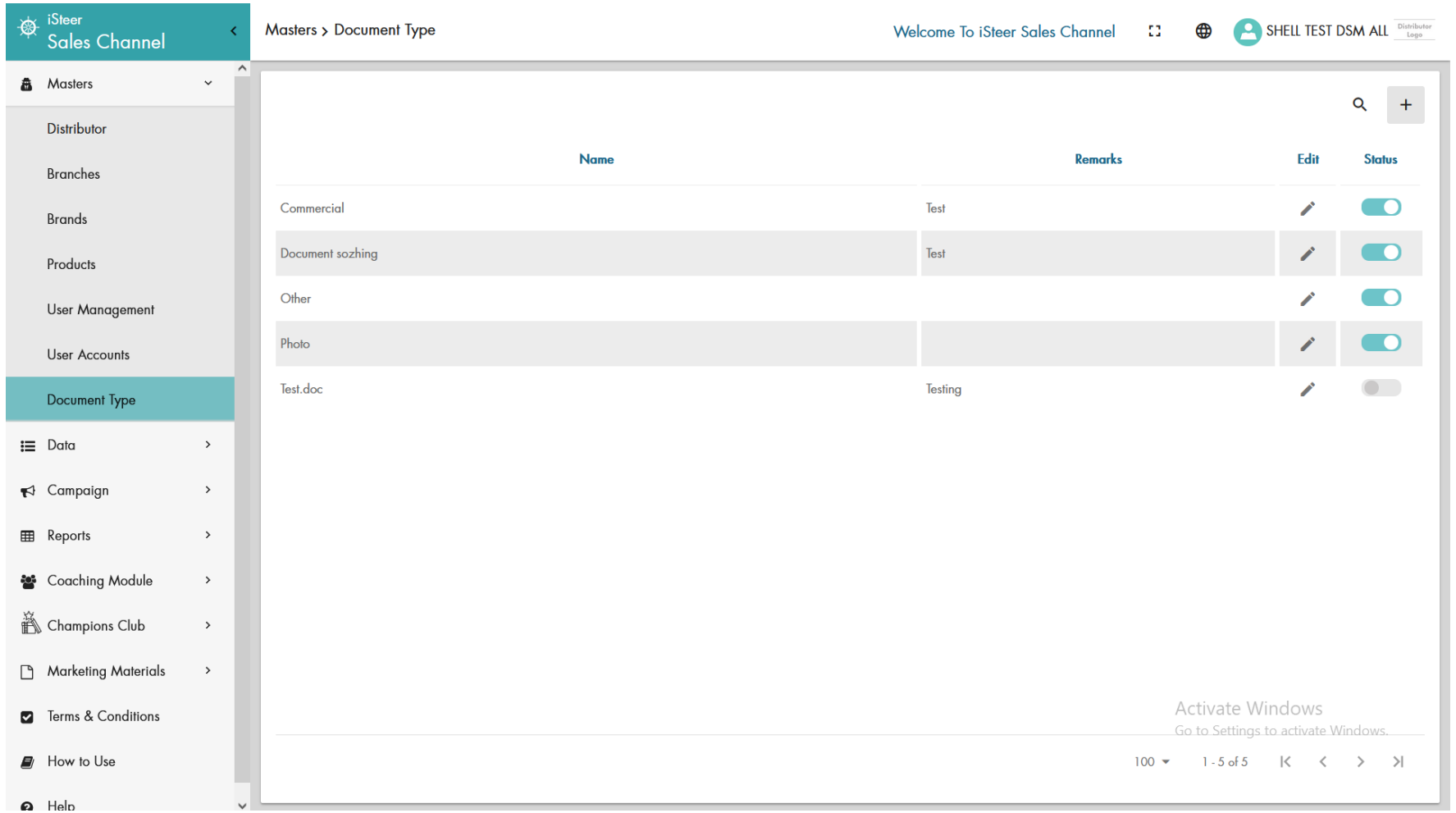
Masters : Document Type



Notes:

- DSM can add a document type by clicking the add icon on the right corner.
- They can edit the current document type.
- They can also change the status of the document (Active / Inactive) .
- This will be listed as the document type for DSR and DFLTS to upload.

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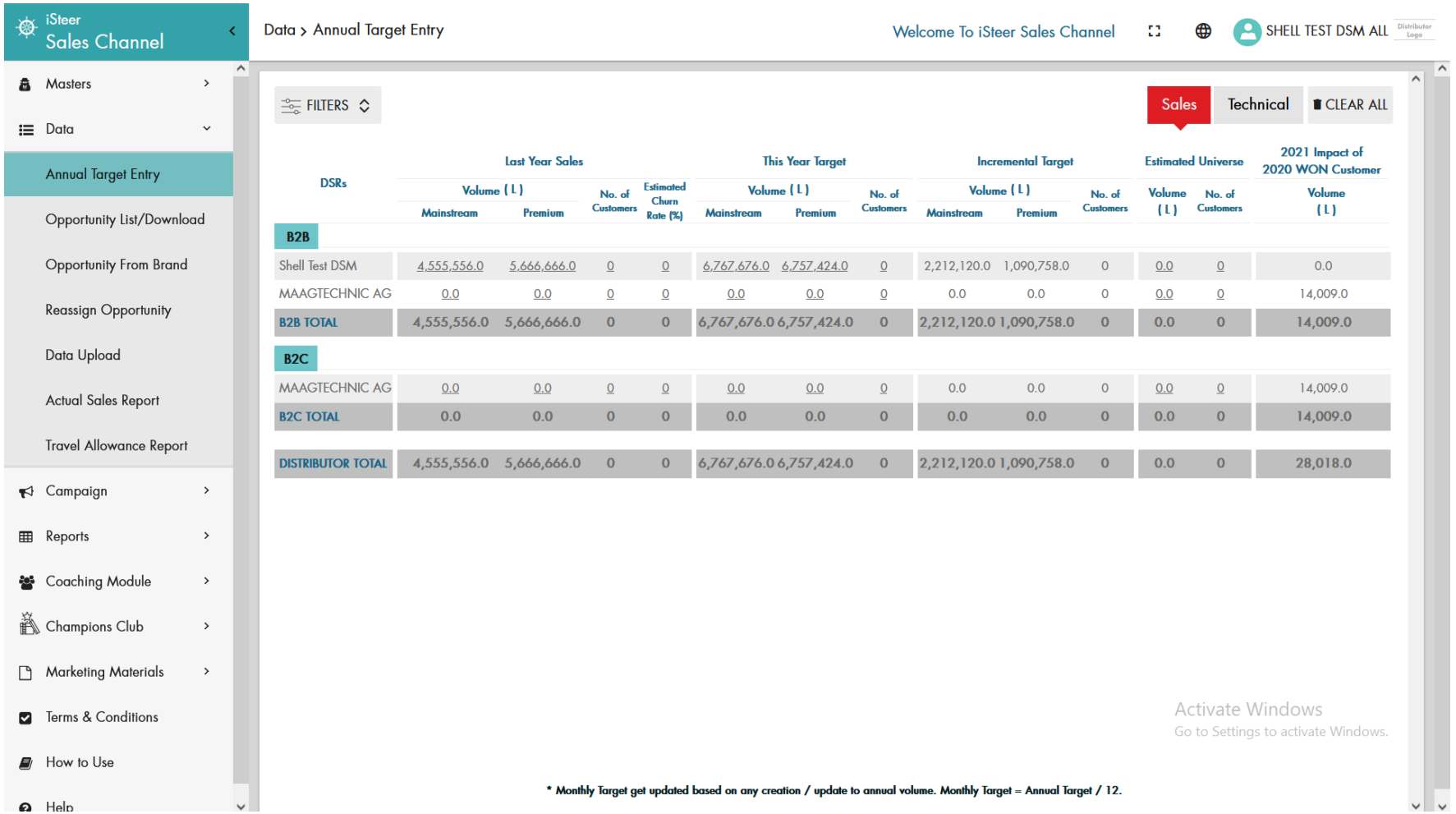
Data : Annual Target Entry - Sales



Notes:

- The data for Annual Target Entry sales of DSR's will be available here.
- Both B2B and B2C Target entry sales data will be available here.
- Using the Branch filter, the user can view the sales based on the branch.
- Last year, sales of Mainstream and Premium could be edited directly by clicking the volume, A pop-up will show where DSM can enter the volume.

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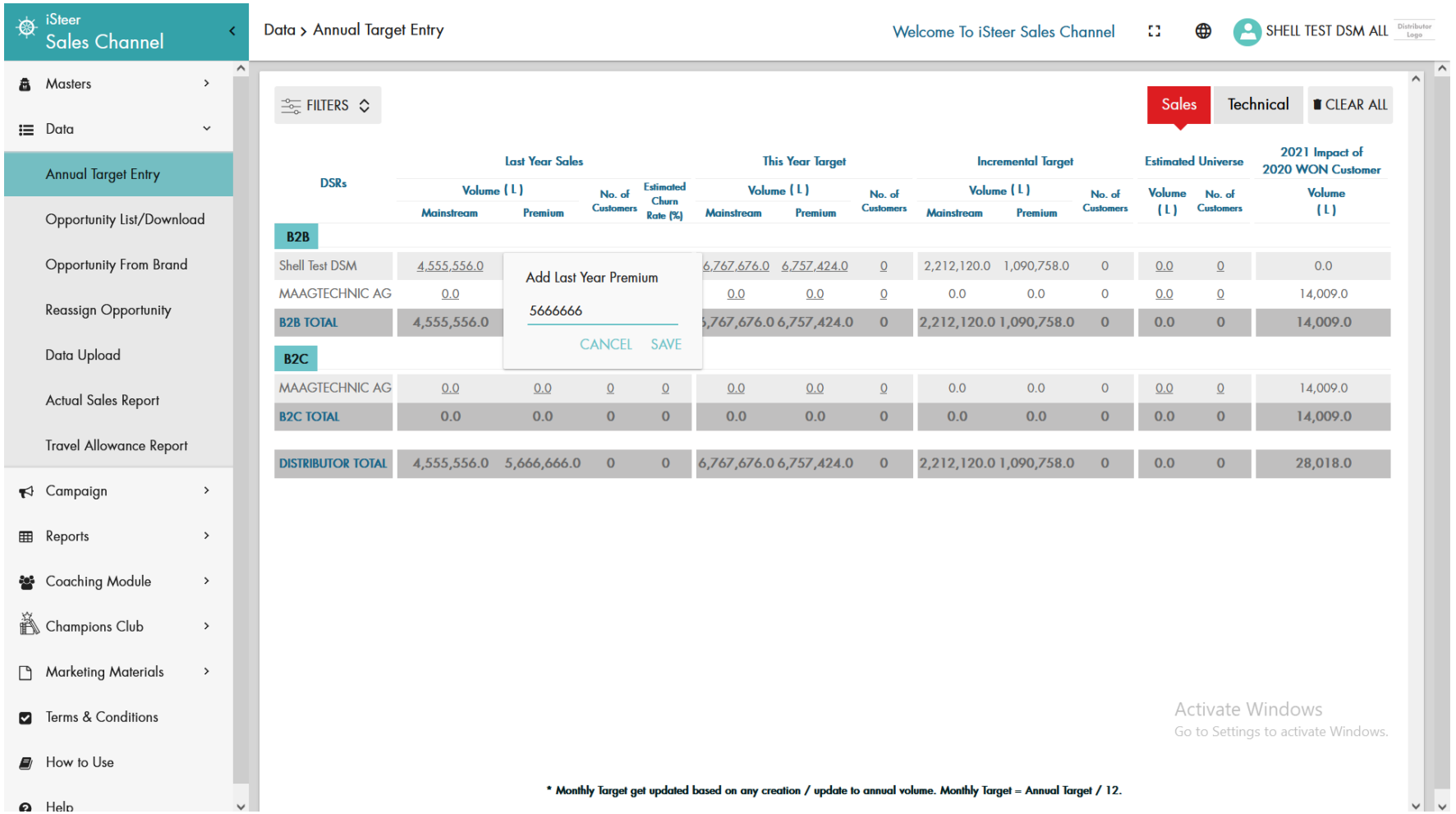
Data : Annual Target Entry - Sales



Notes:

- All the underlined values are editable.
- Based on last year's and this year's target incremental target will be calculated.
- Estimated Universe is also editable, user ca can enter the volume and no. of customers.
- The 2020 impact will be auto-calculated based on the volume of 2019 won customers.

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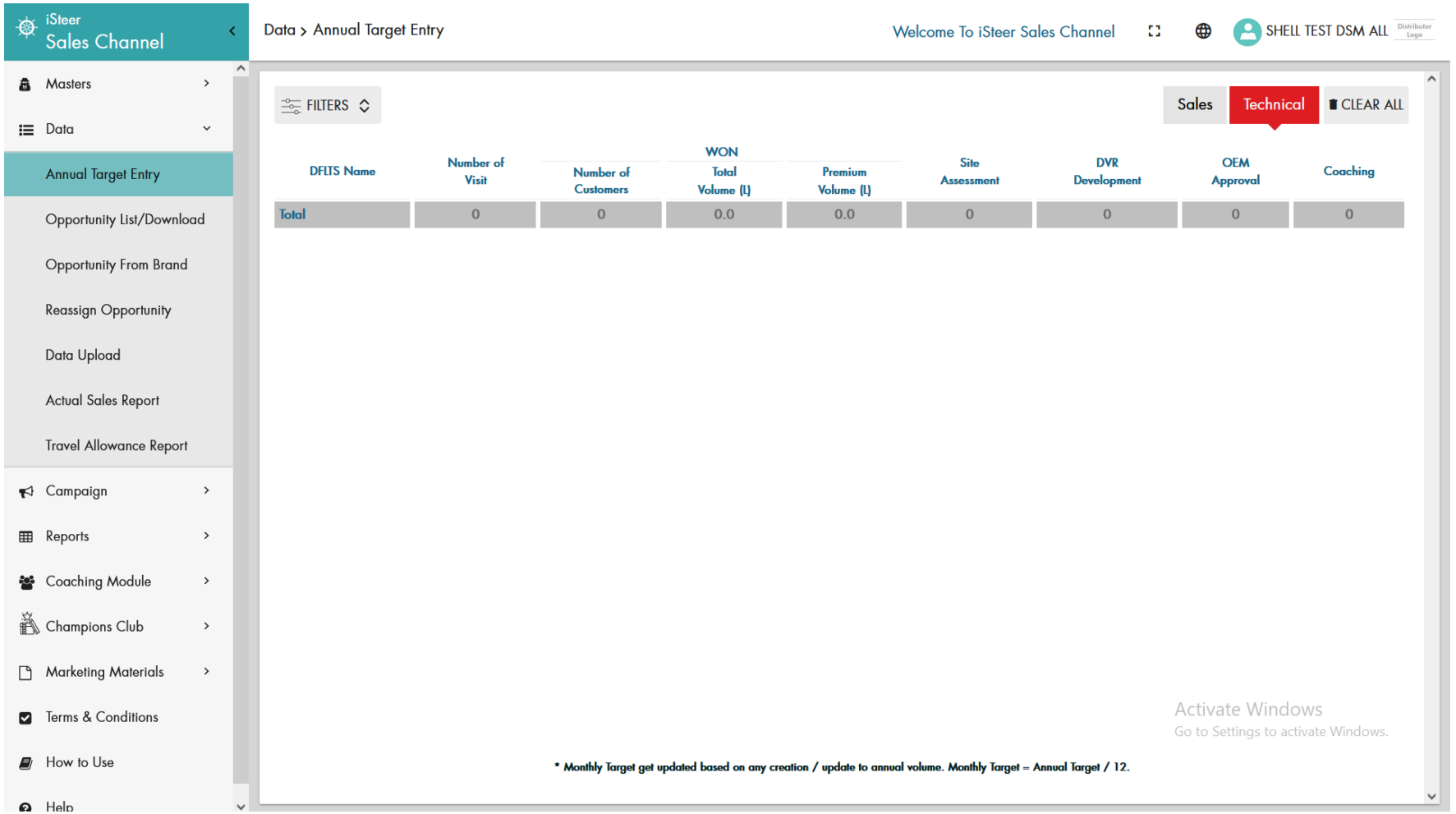
Data : Annual Target Entry - Technical



Notes:

- The data for the Annual Target Entry Technical will be available for DFLTS.
- Technical data like No. of Visits, DVR Generation and No. Of Won Customers will be available here.
- All underlined values are editable, so DSM can edit those data as required.

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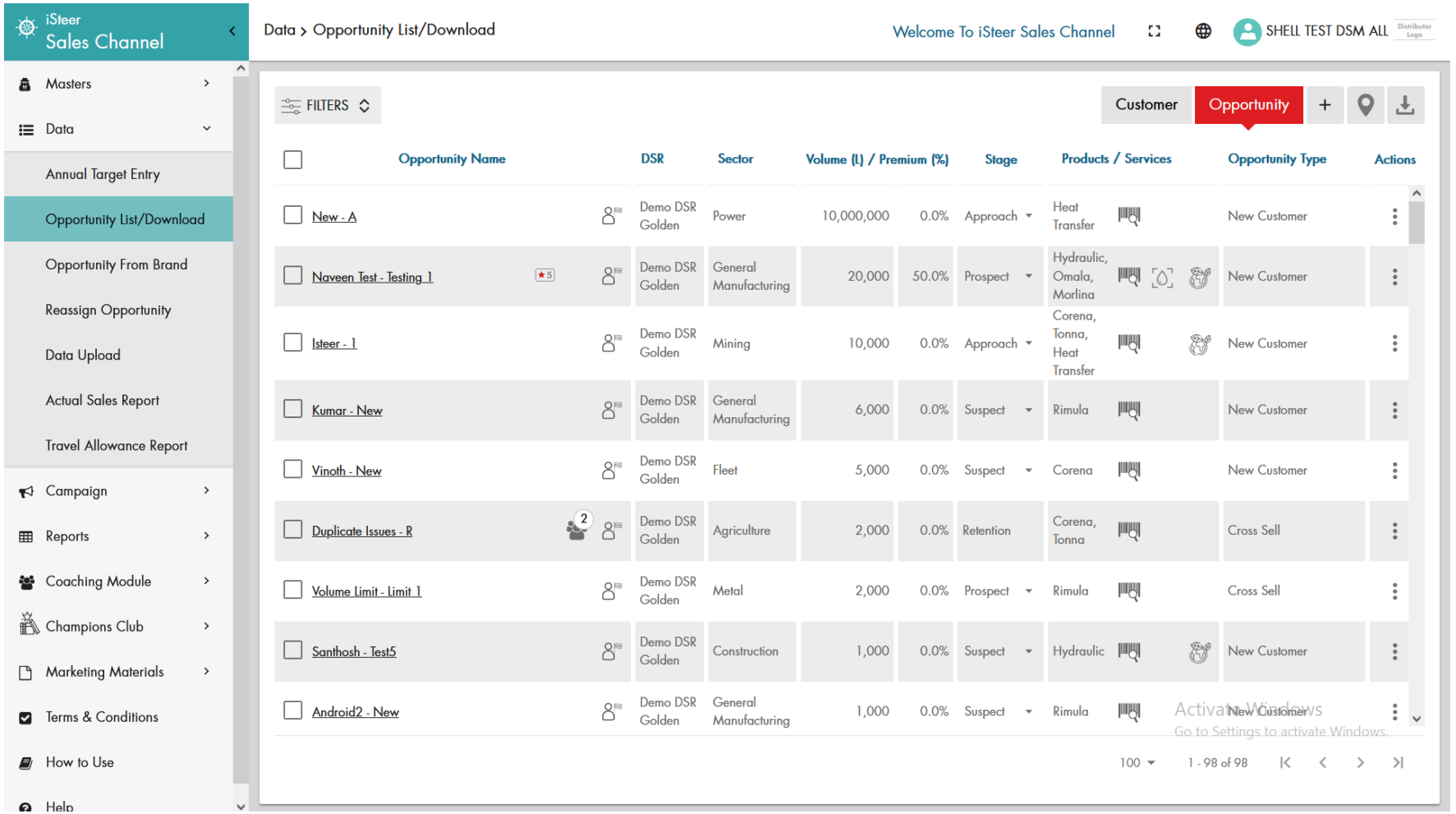
Data : Opportunity List/Download



Notes:

- DSM can create an opportunity by clicking the add icon for "New Customer and New Opportunity". From an existing Customer, they have to assign the opportunity to a DSR.
- DSM and DSR can add multiple opportunities to a single customer.
- Group Icon mentioned as the opportunity to have a parent opportunity.

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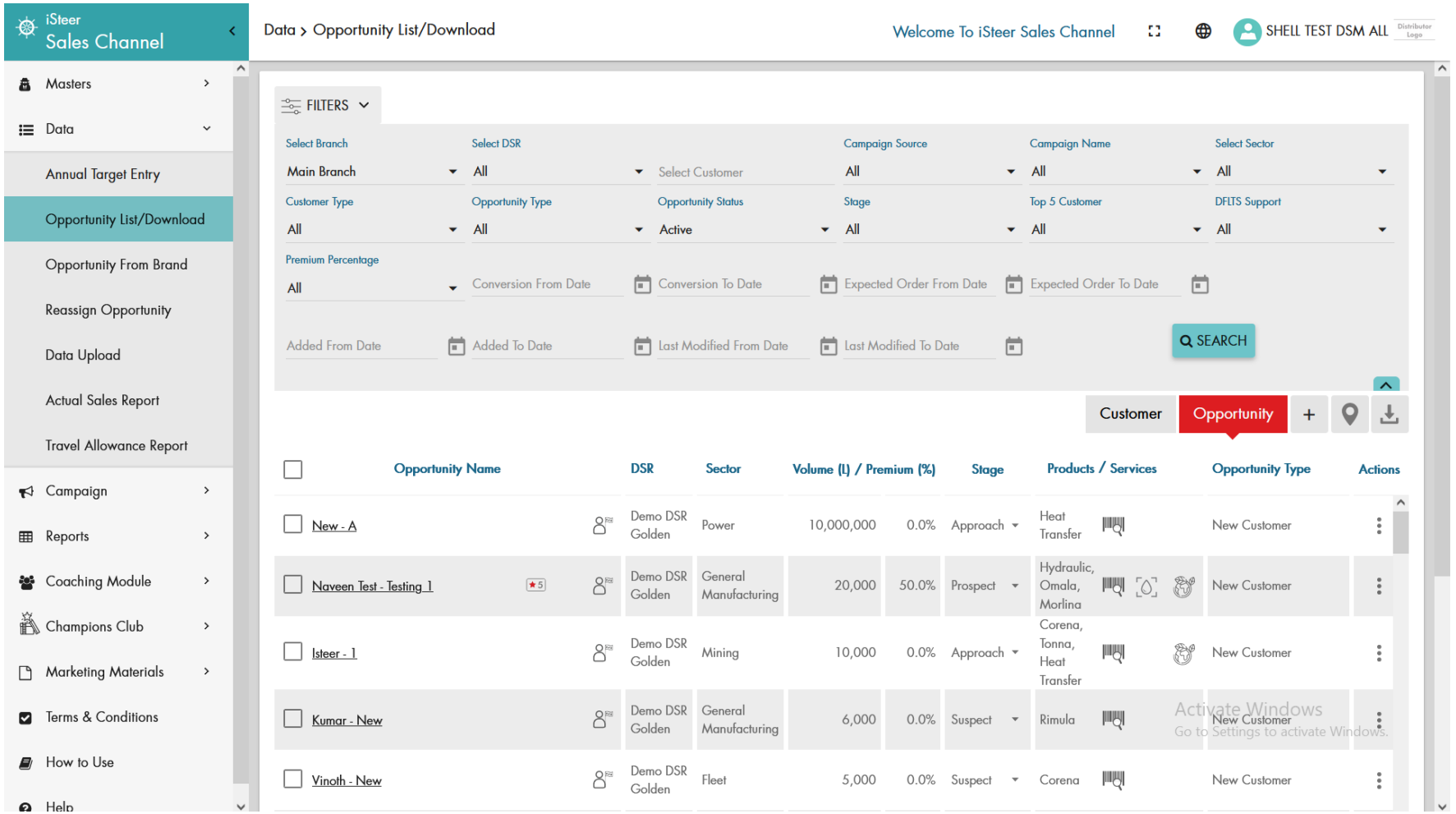
Data : Opportunity List/Download



Notes:

- DSR's DFLTS opportunity will be listed here.
- DSM can download the opportunities and products in an excel file by clicking the download icon.
- DSM can use various filters to search for opportunities.
- Conversion, Expected, Added, and Last-Modified dates are also available here.

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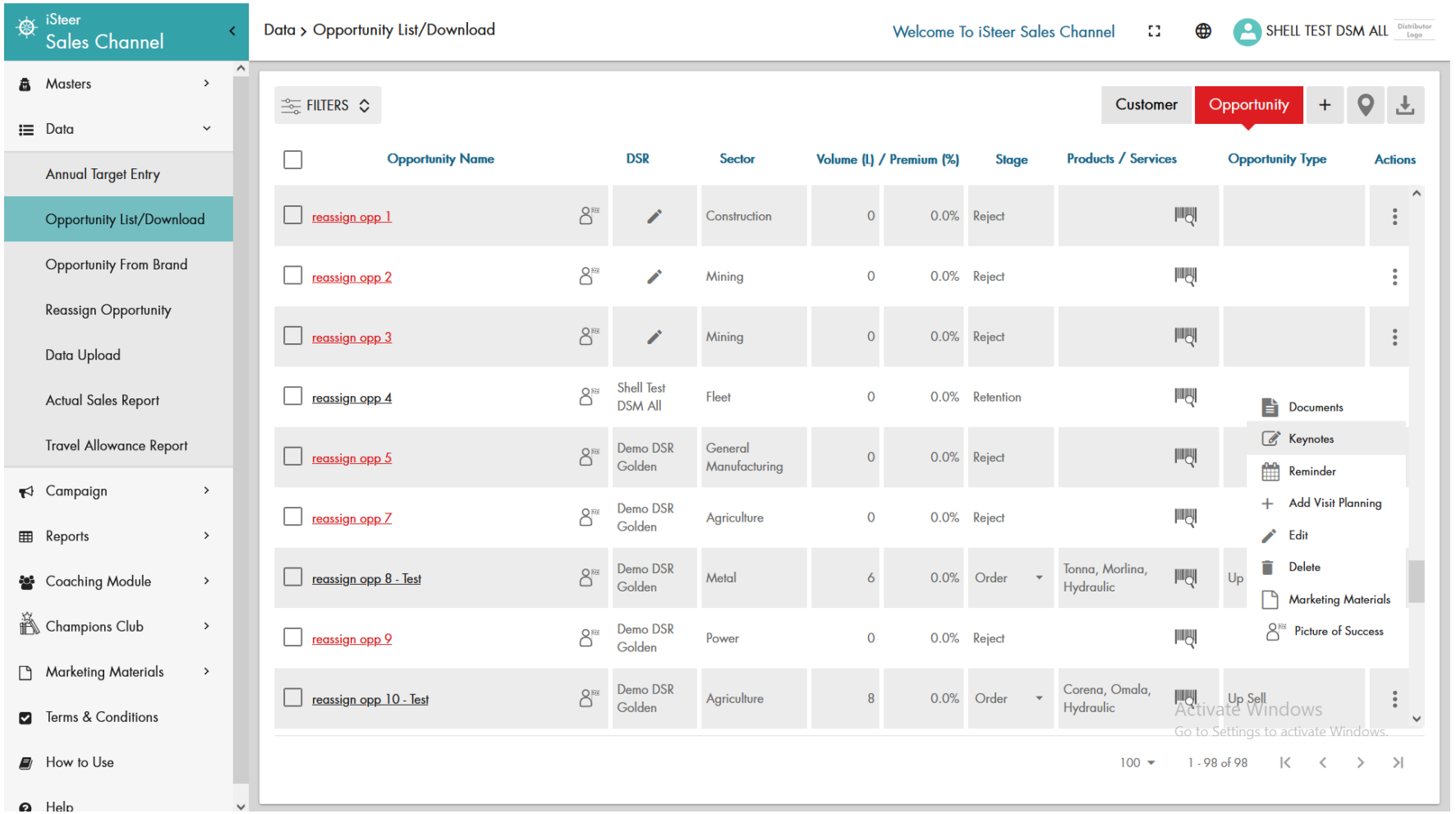
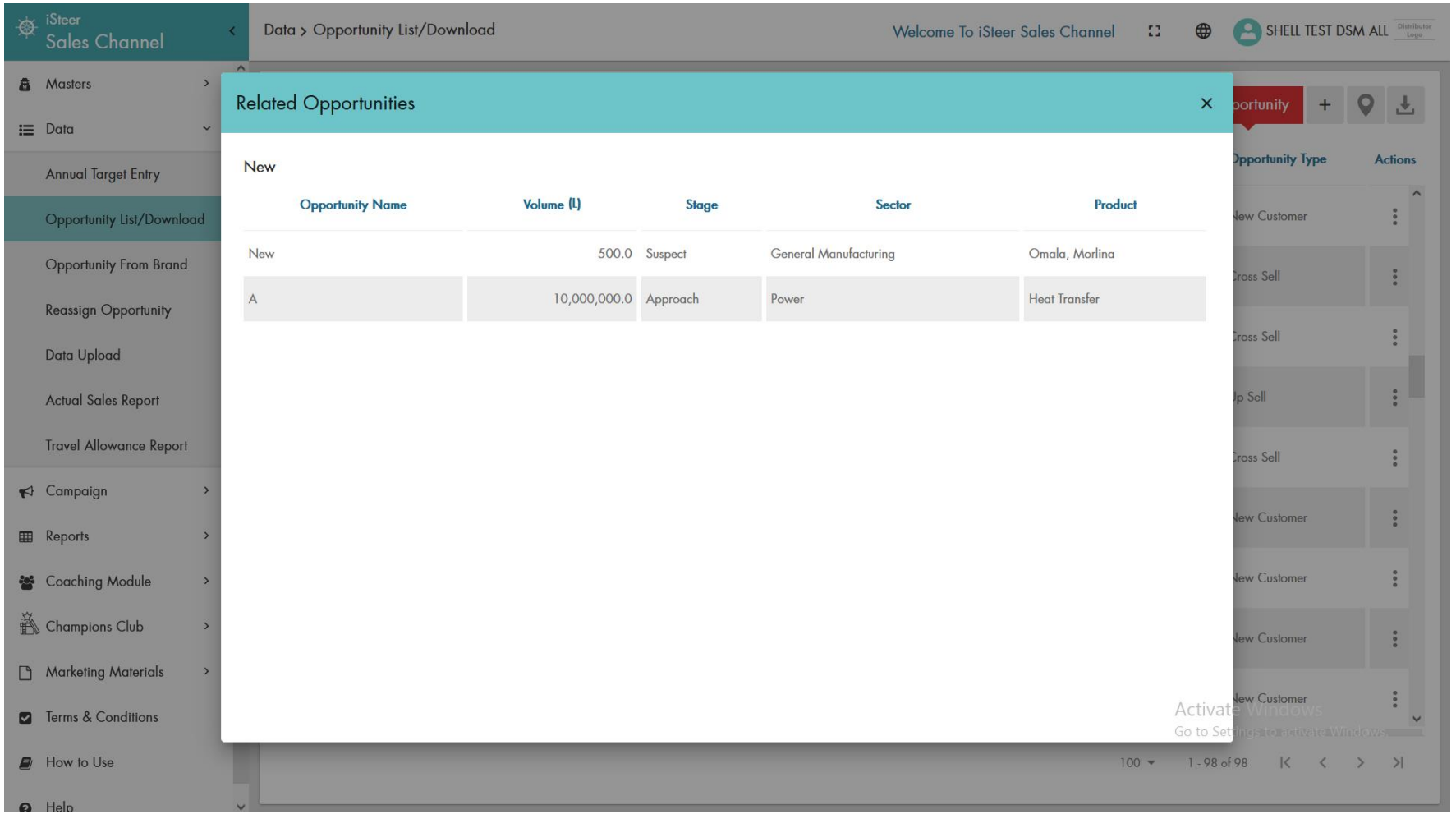
Data : Opportunity List/Download



Notes:

- DSM can view, edit ,add the Products, Services, Documents, Keynotes, Reminders of the opportunities.
- DSM can also delete the opportunities.
- A DSM can add POPSA to the customer and assign it to a DSR.

Data : Opportunity List/Download – Related Opportunities



Notes:

- DSM can view related opportunities by the customer by clicking the group icon.

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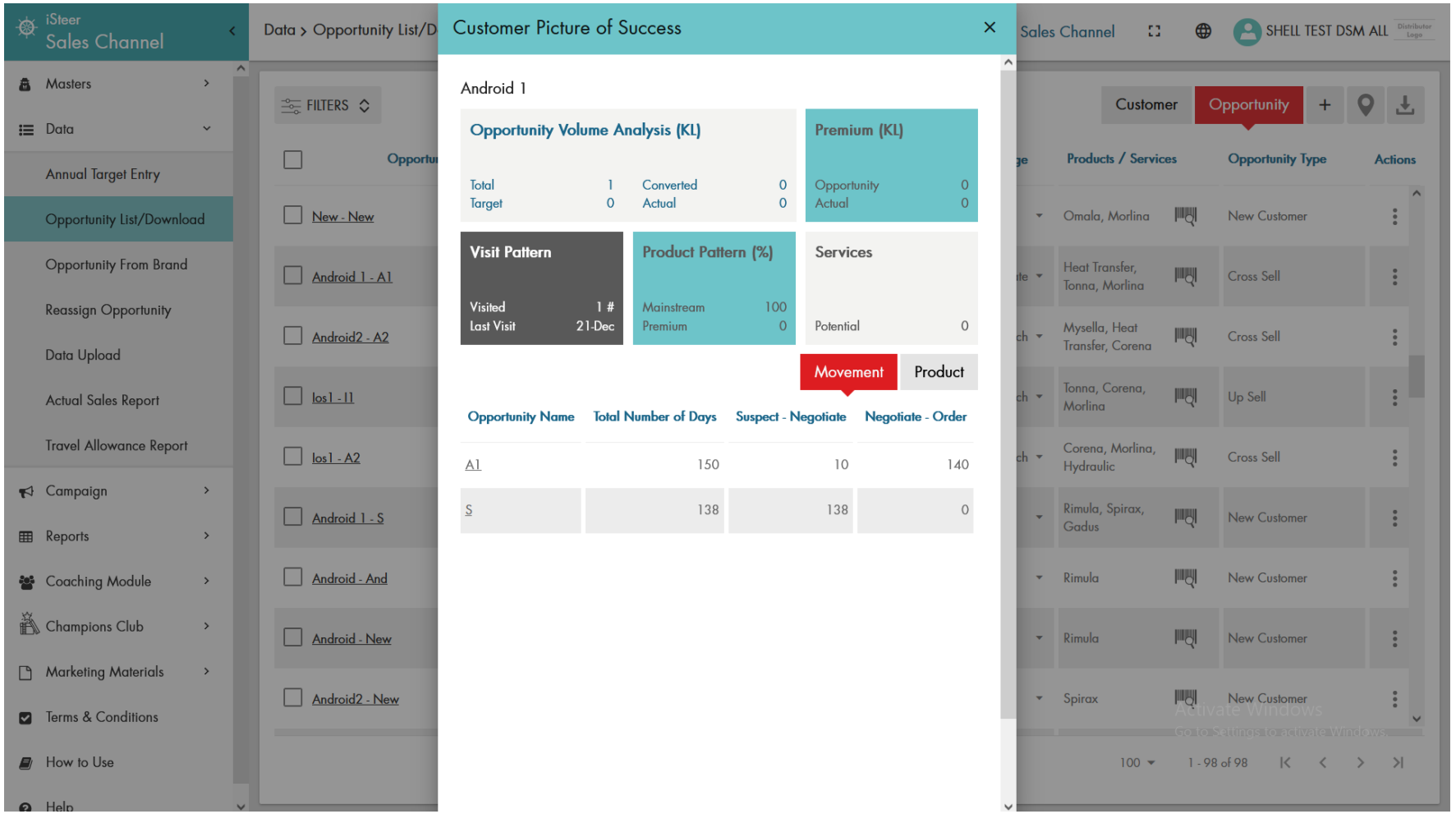
Data : Opportunity List/Download - Customer Picture of Success



Notes:

- DSM can view the Customer details through the picture of success.
- DSM can view the opportunity analysis, premium, visit pattern, product pattern, and services of the customers.
- Click on 'Movement'. It displays the number of days for suspect-Negotiate stage and Negotiate-Order Stage.
- Click on a Product and it displays the SPANCOP (Suspect-Negotiate for ▽ symbol) and (Order for ✓ symbol).

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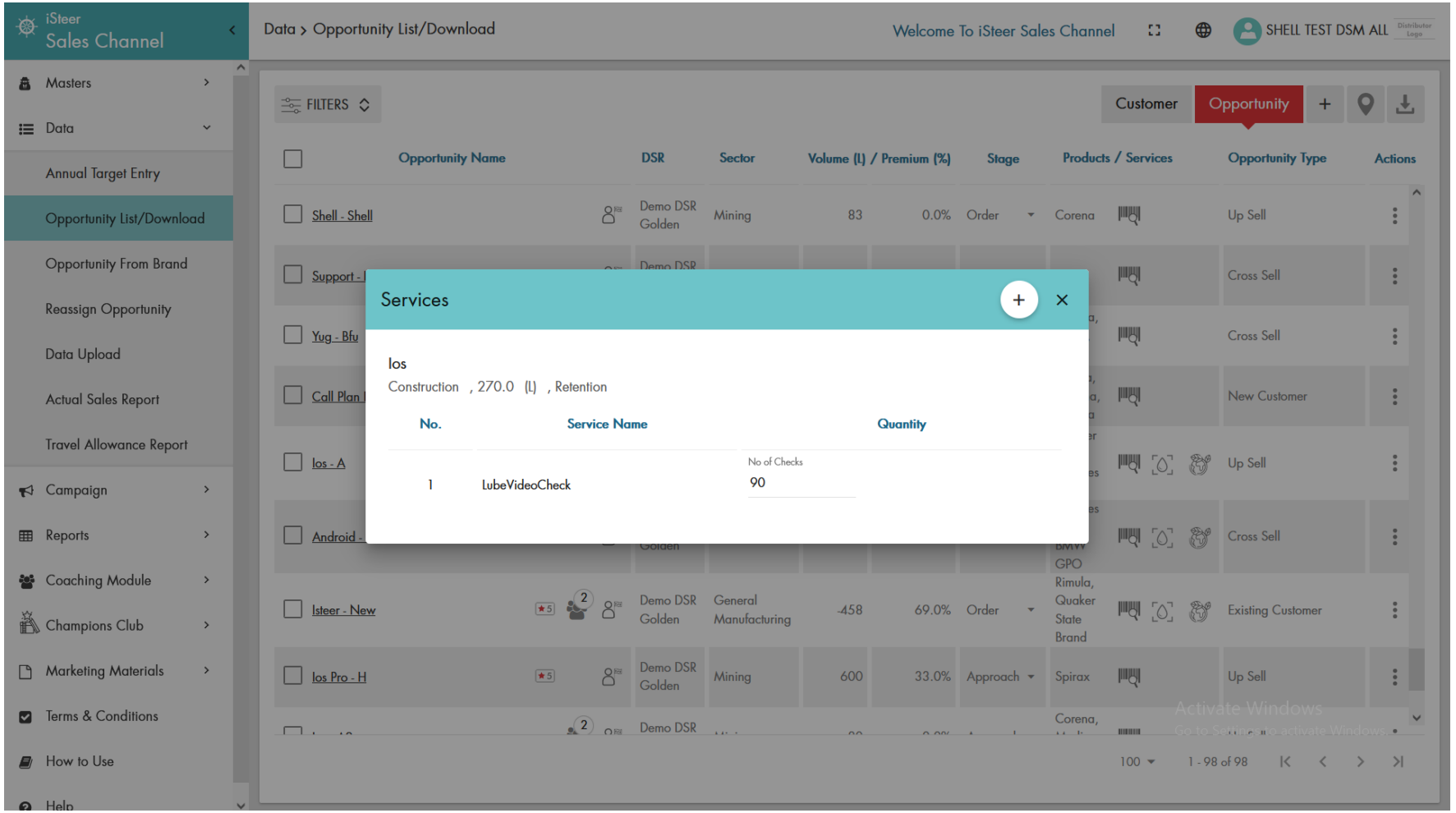
Data : Opportunity List/Download – Sustainability Product



Notes:

- DSM can view, add, edit the sustainability product by clicking the global icon.
- Sustainability volume cannot exceed the total annual potential volume.
- User can even delete the product.
- Sustainability product can be viewed in Sector and product split.

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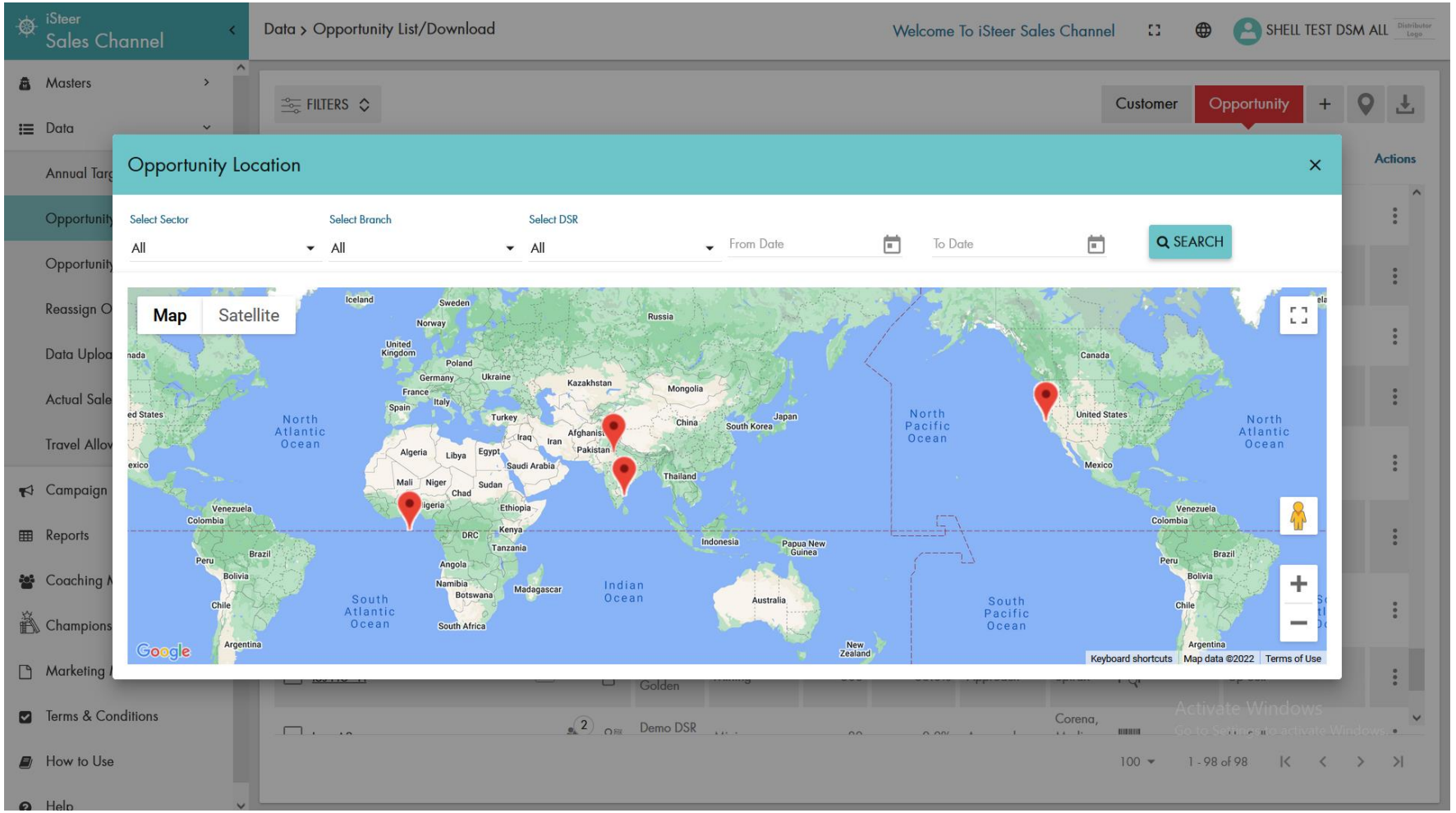
Data : Opportunity List/Download – Opportunity Location



Notes:

- Opportunity locations can be viewed in the Opportunity List /Download by clicking the Location Symbol.
- For the opportunity to appear here, It's location needed to be added from the mobile using the Sales Channelmobile app by their DSR's / DFLTS.
- Users can filter the opportunity location based on Sector, Branch, DSR, an opportunity created date.

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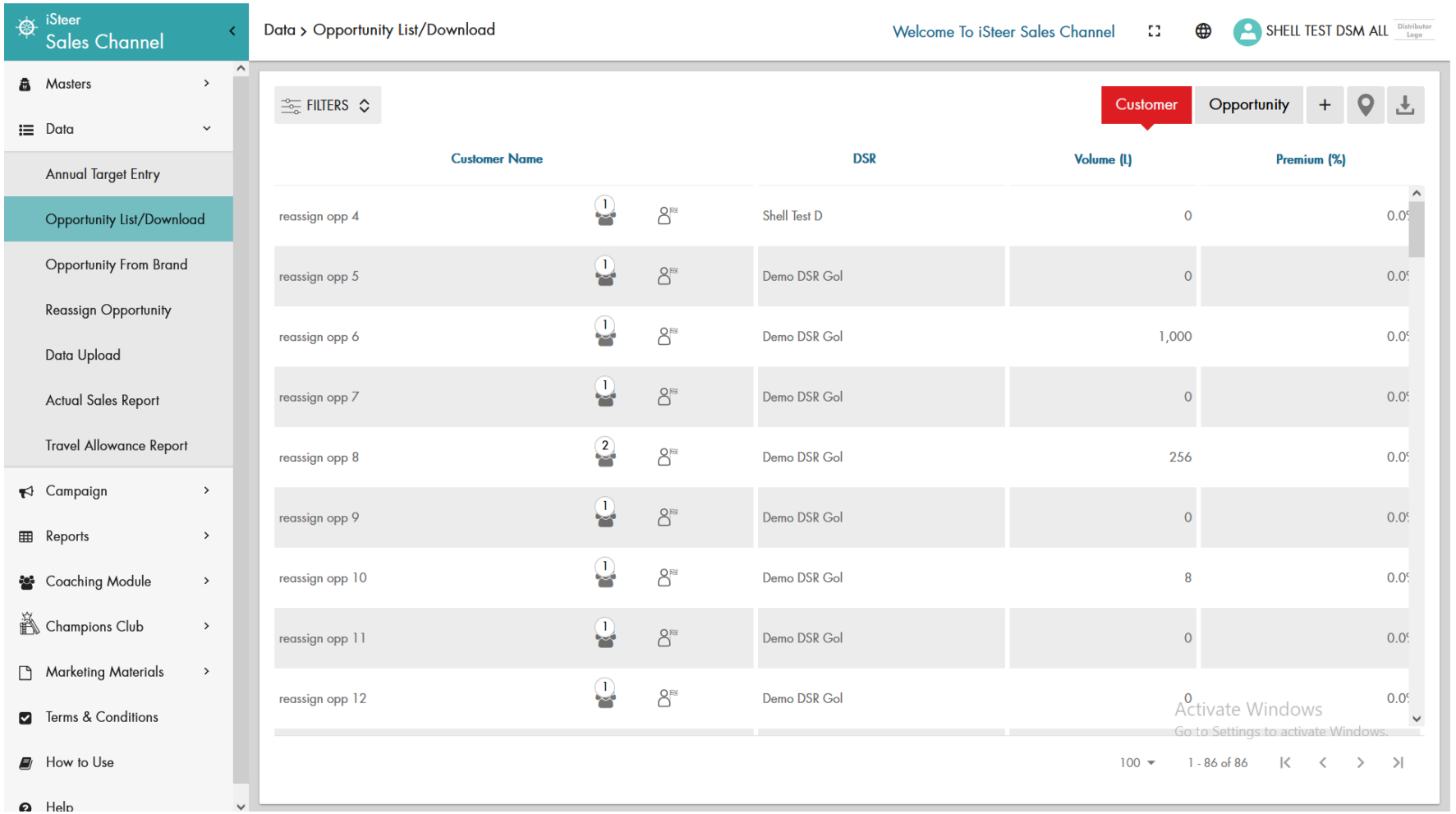
Data : Opportunity List/Download – Customer Tab



Notes:

- In the opportunity list/download, the Customer based details can be viewed by clicking on the Customer Tab.
- The details user can see are Unique customer name, total volume and premium.
- The Related Opportunity count and Picture of success will also be displayed as like in the Opportunity tab.

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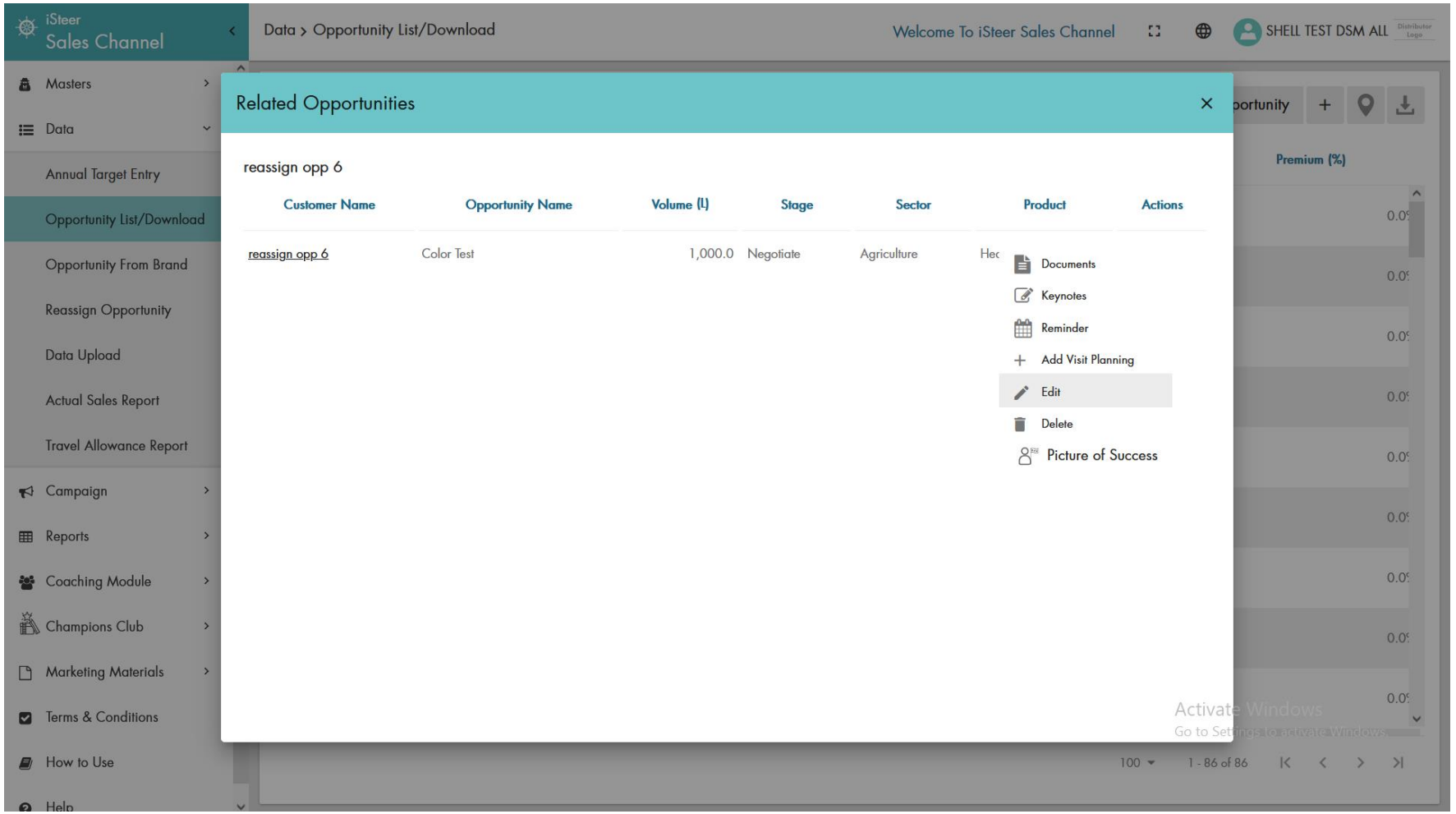
Data : Opportunity List/Download – Customer Tab



Notes:

- User can also edit, merge, demerge, or add documents, keynotes, remainders etc. By clicking on the related opportunity icon.

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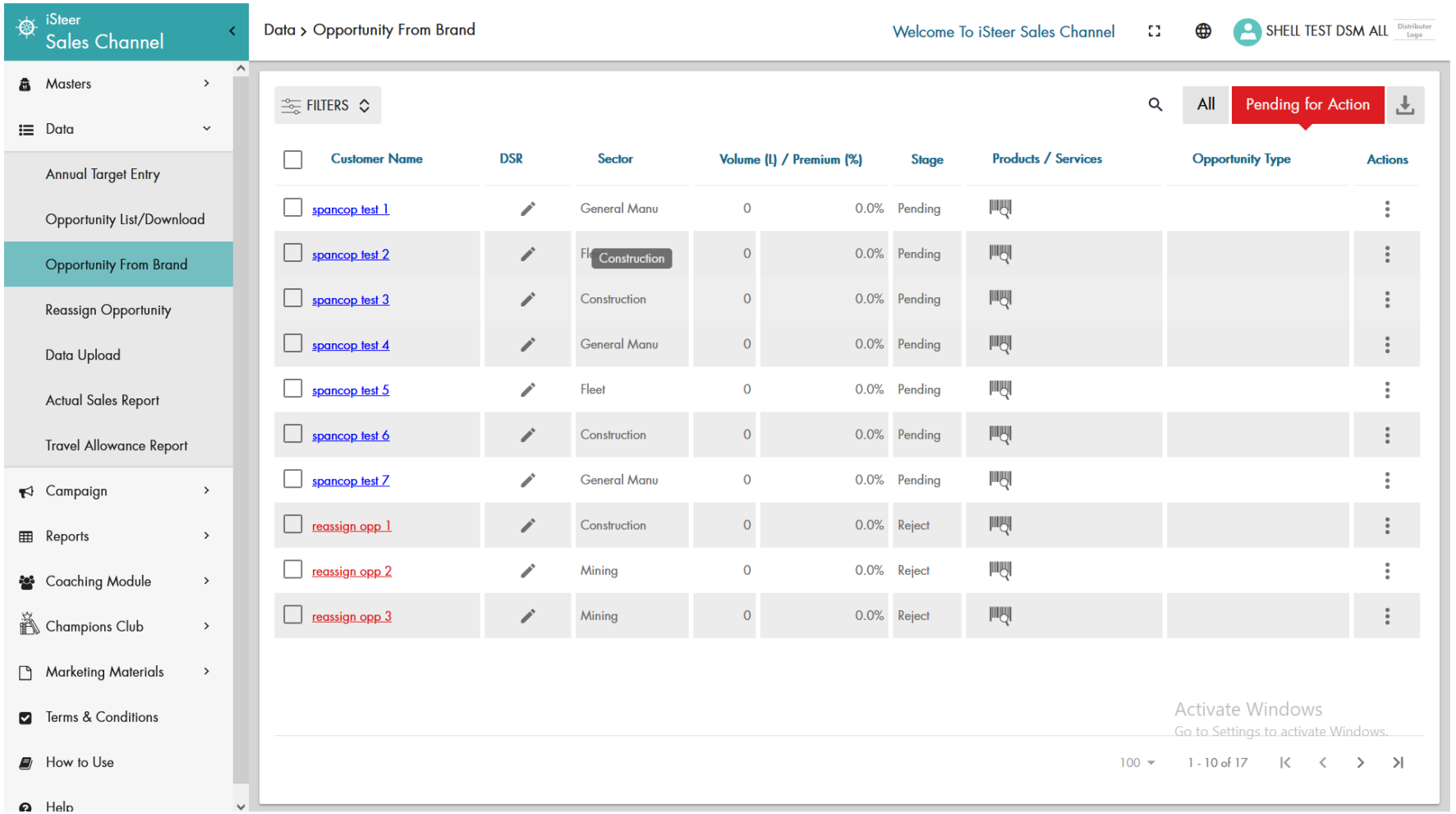
Data : Opportunity From Brand



Notes:

- Opportunities uploaded through brand will appear here.
- Stage will be pending and the text color will be in blue until a DSR accepts the opportunity.
- Users can view Pending Opportunities in Pending for Action.
- Users can download leads in Excel by using the Download symbol.
- DSM can use various filters to search for opportunities.
- Conversion, Expected, Added, and Last-Modified date are also available here.

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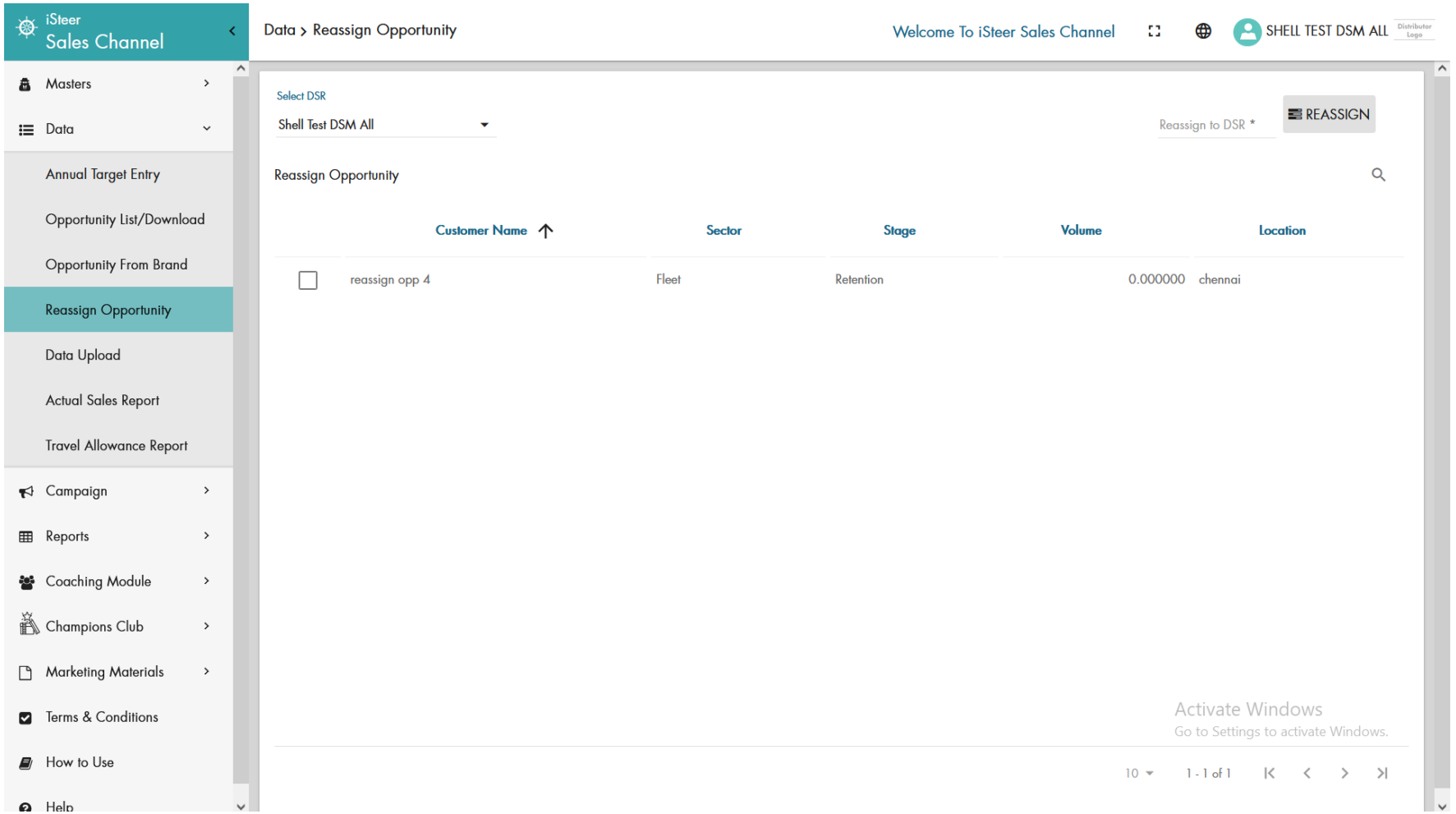
Data : Reassign Opportunity



Notes:

- DSM can reassign opportunities from one DSR to another DSR.
- The DSM must choose the name of the DSR to whom he wishes to reassign the leads.

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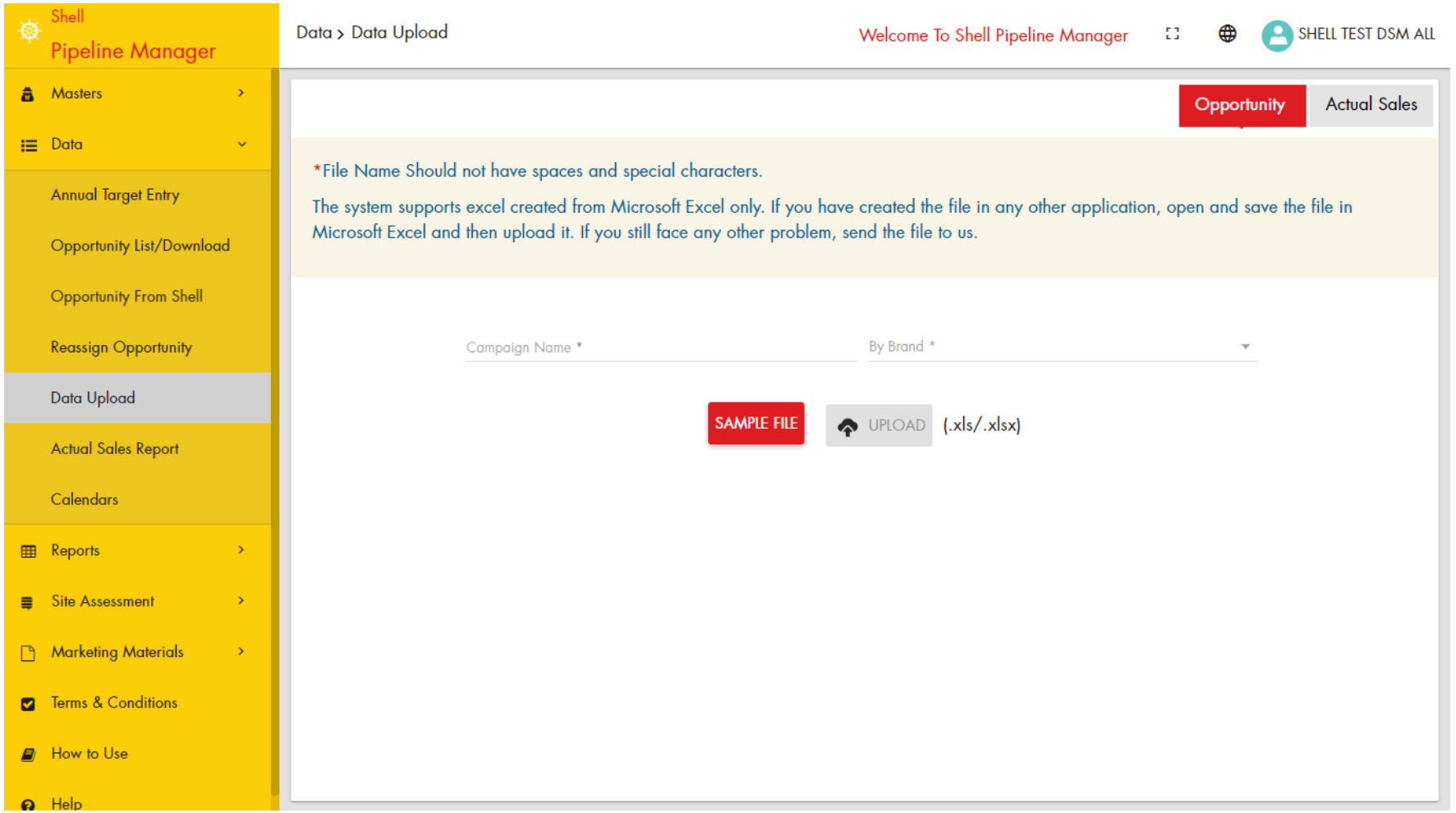
Data : Data Upload - Opportunity



Notes:

- DSM can upload bulk opportunities by using Opportunity Upload.
- DSM has to upload it in the correct format.
- DSM can download a sample file for reference.
- The name of the file should not contain spaces or special characters.
- Only when all the conditions are met, the upload button will become active. It's the color that will change from grey to yellow.
- DSM can change the Unit of Measure according to the uploaded file.

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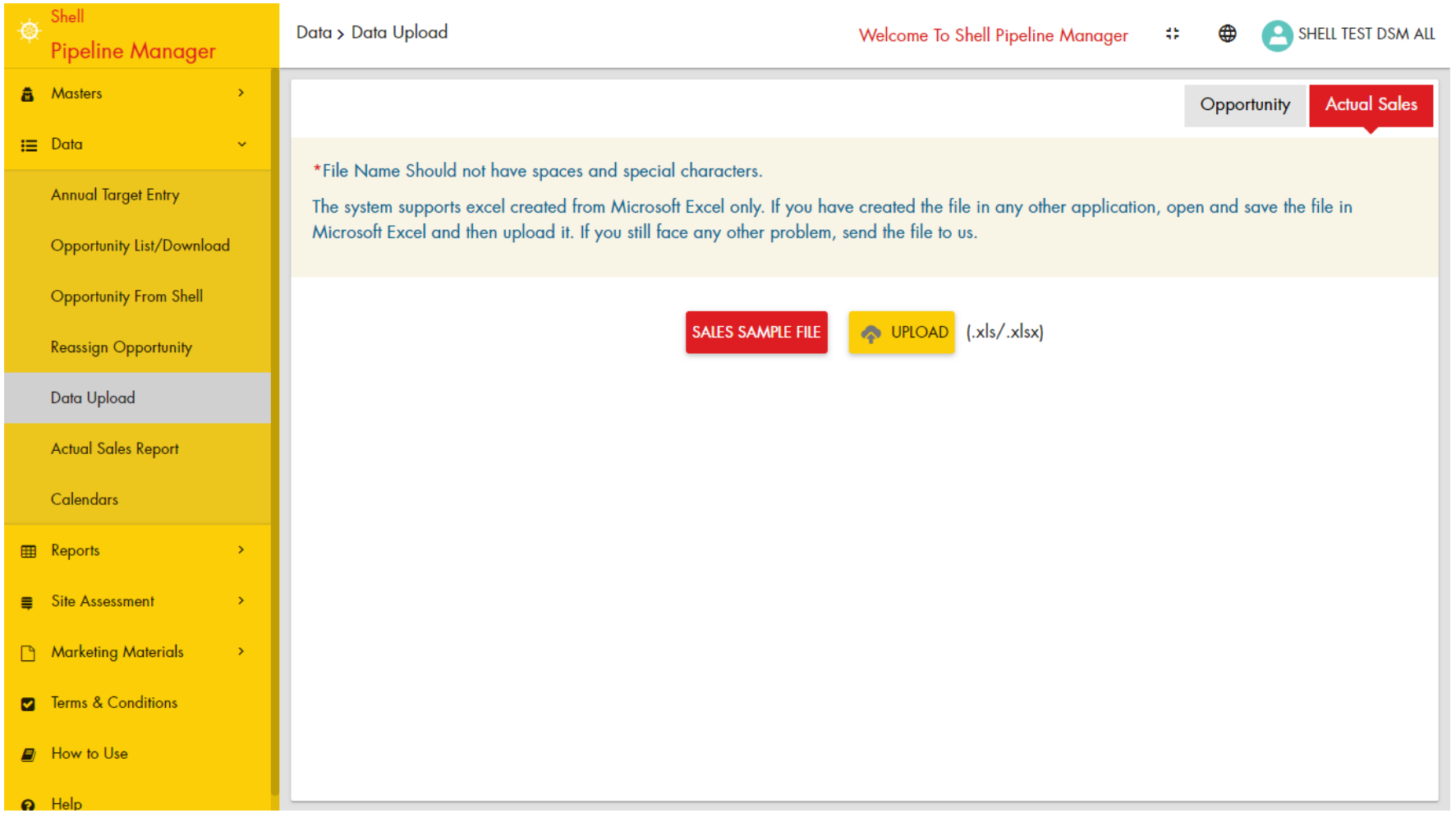
Data : Data Upload – Actual Sales



Notes:

- DSM can upload the Actual sales data on this page.
- The name of the file to be uploaded shouldn't contain spaces or special characters.
- Only Microsoft Excel files should be uploaded here.

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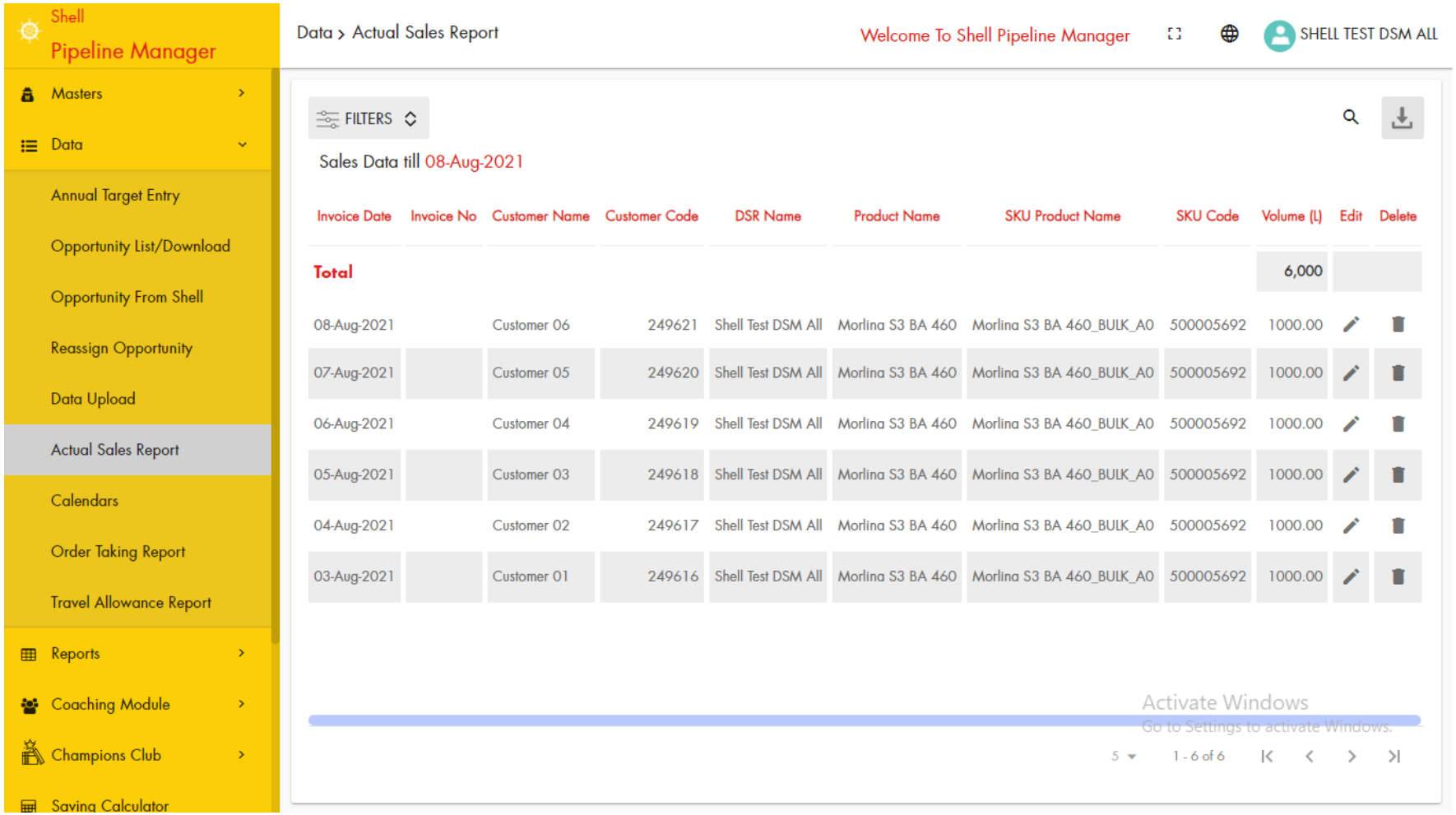
Data : Actual Sales Report



Notes:

- Uploaded sales data will be available here.
- DSM can use the various filters to search for sales.
- The Sales Report can be downloaded based on privilege.
- Download should be enabled in special roles

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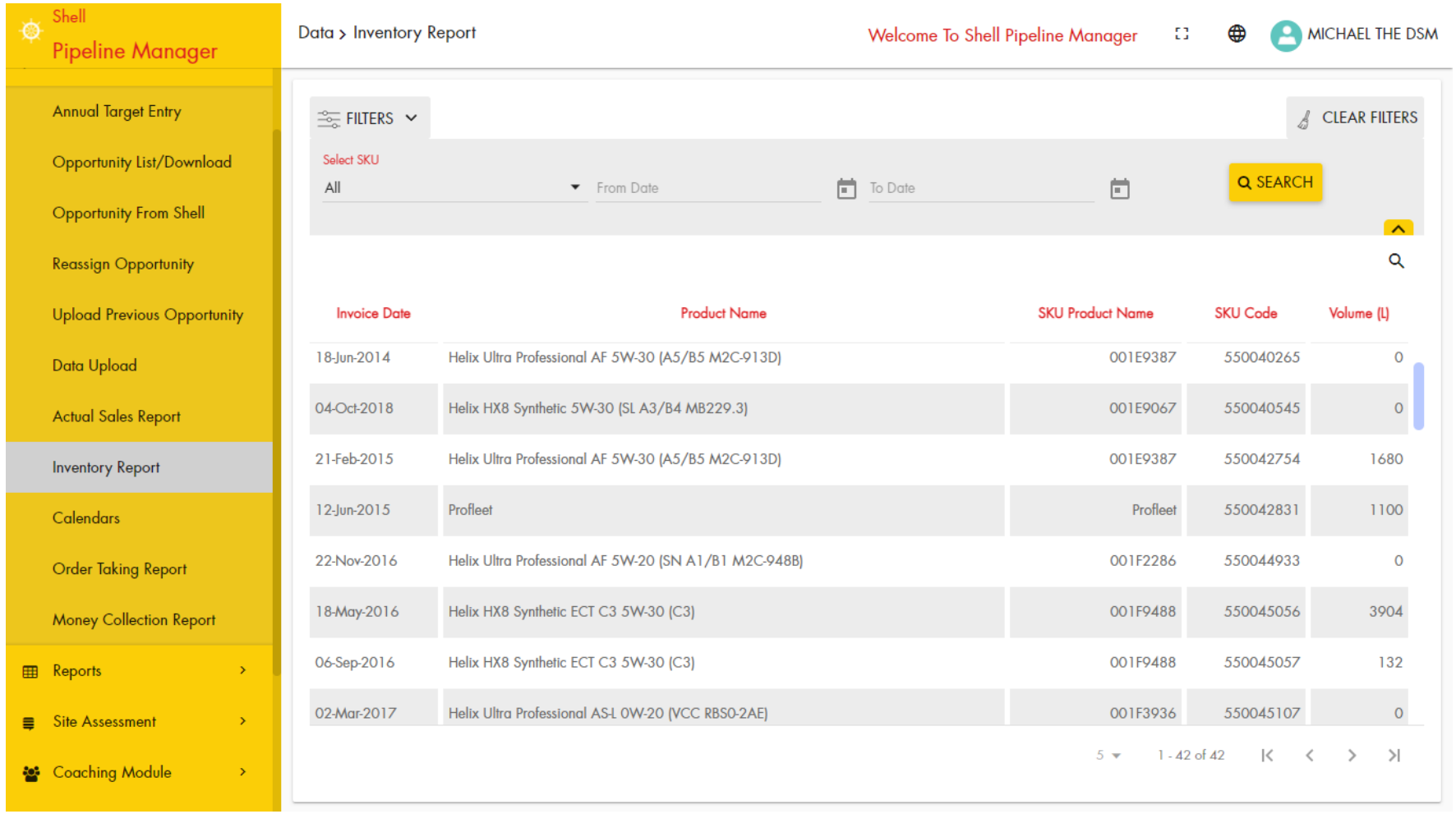
Data : Inventory Report



Notes:

- An Inventory report can view the stock details of product available in shell with volume.

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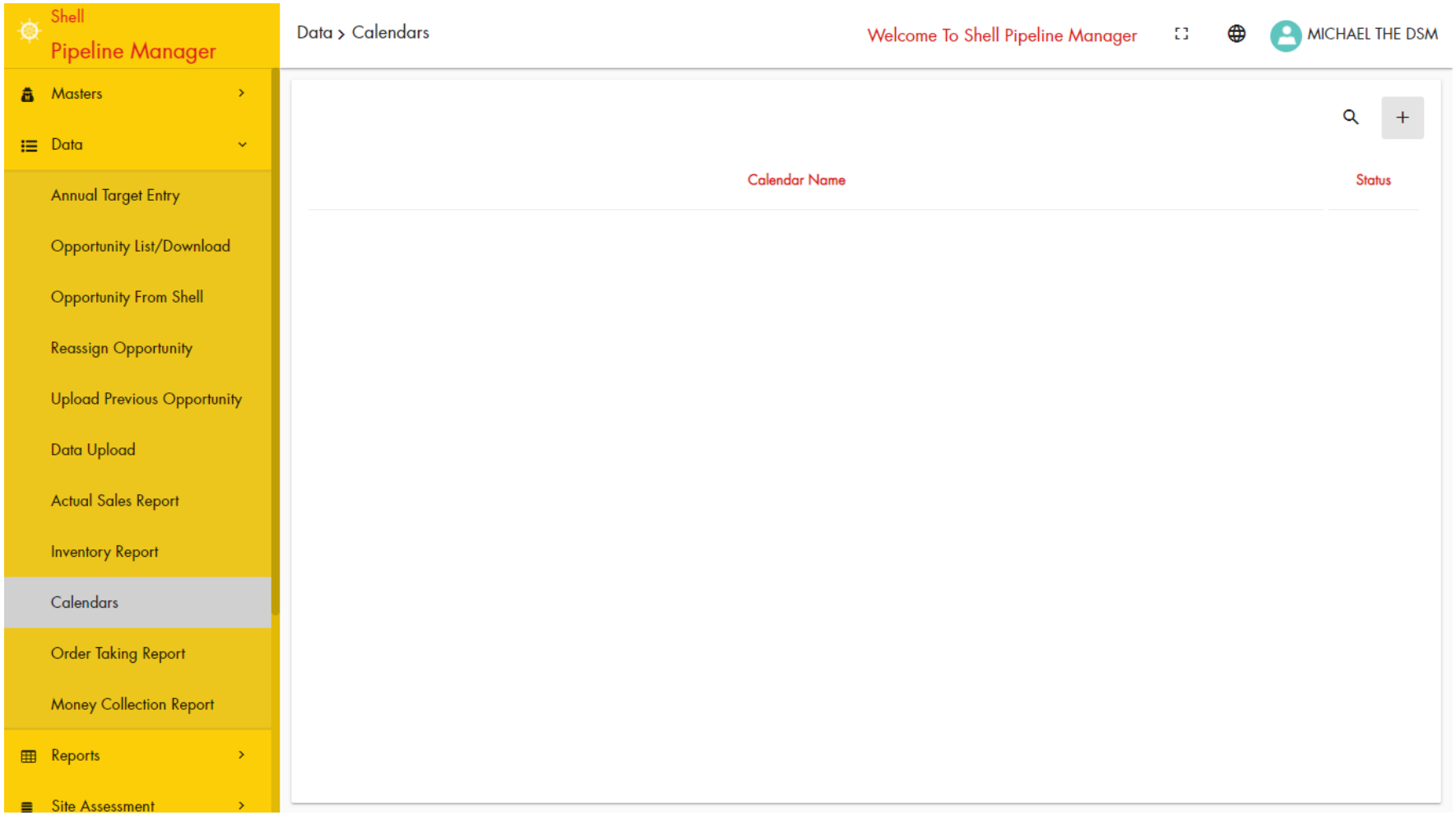
Data : Calendars



Notes:

- DSM can add their calendar here by clicking the add button on the top right corner.
- The system currently supports the following calendars iCloud, Google, Outlook, Exchange and Office 365.
- Once they have added a calendar they can enable or disable the calendar by changing the status.
- One-way push from the Sales Channelto other calendars only
- $2 will be charged for each calendar.

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Data : Money Collection Report

Notes:

- Clicking on the plus icon can enter the details of a customer's payments.
- There are 3 modes of payment namely, cash, cheque and credit.
- Select the payment for "Credit" or "Cash" or "Cheque" mode, and enter the details which are mandatory fields.
- The entered collection report will be displayed.
- User can edit or delete the report and a date filter is also available.

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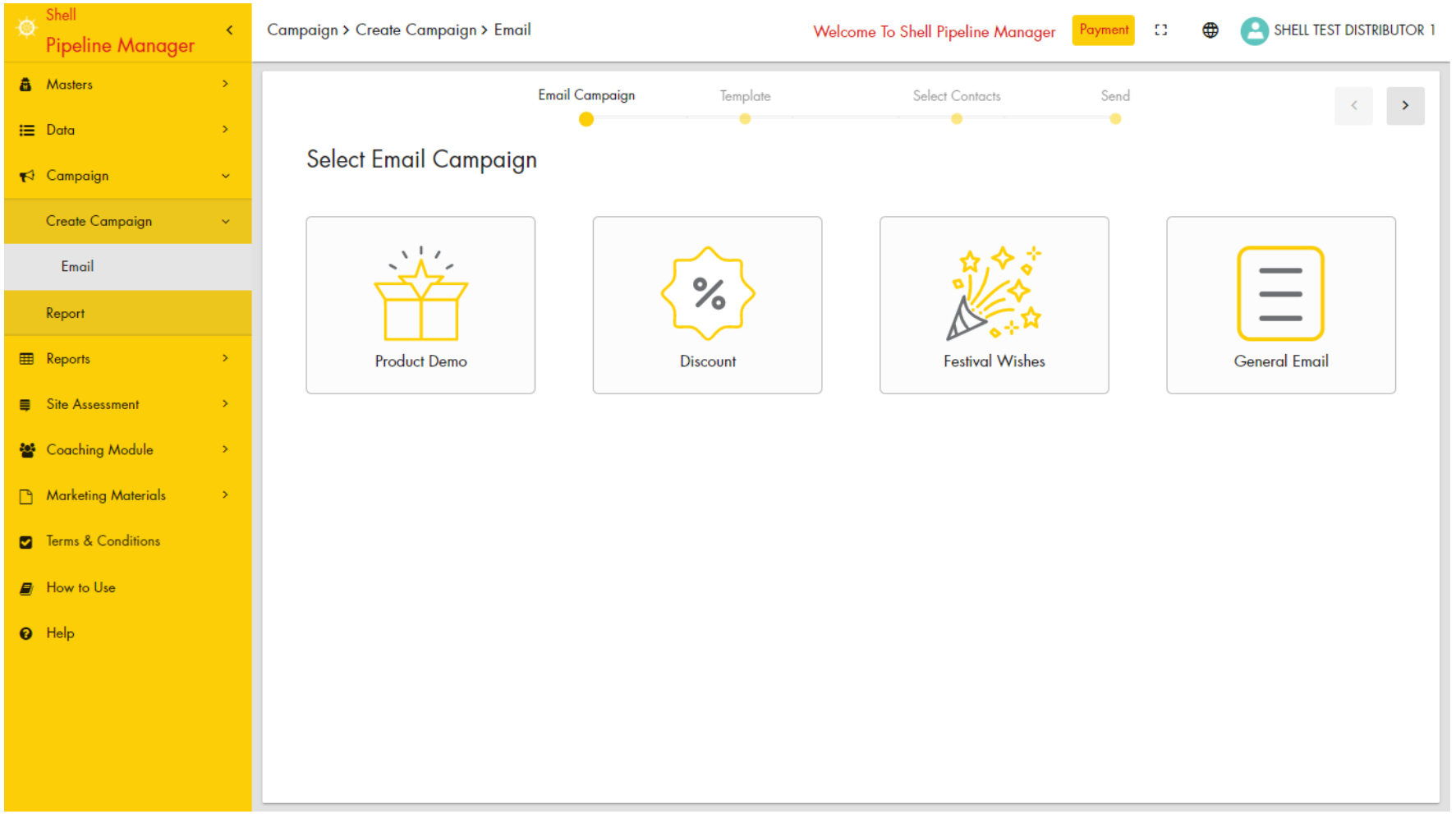
Campaign: Create Campaign - Email



Notes:

- A Distributor user can create an email campaign using the template here.

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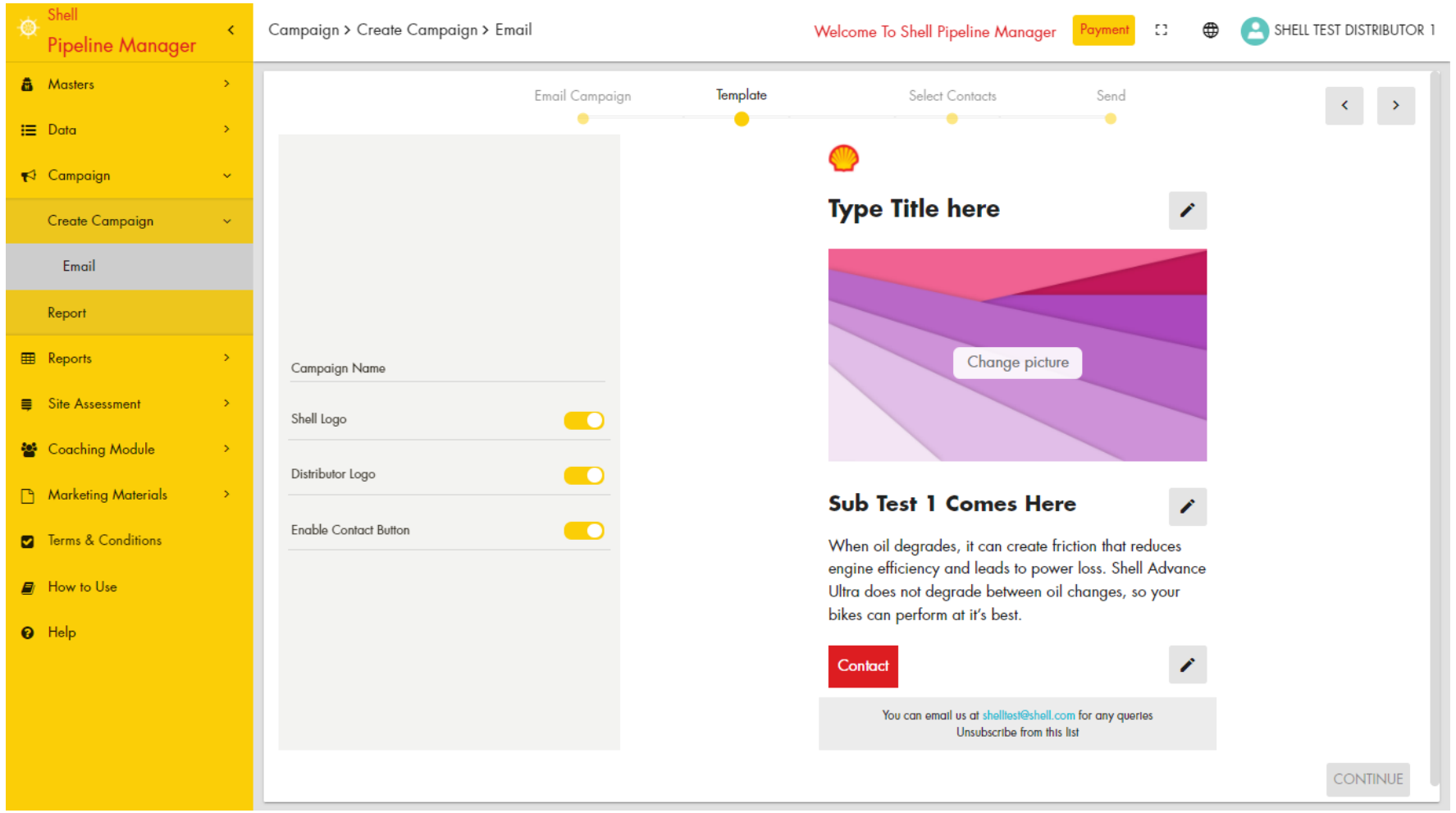
Campaign: Create Campaign - Email



Notes:

- The Content , Title, Picture, the user needs can be added here.
- All the fields are mandatory
- If a user needs to send a message with a logo, an icon that can be disabled is available.
- To proceed to the next process, click the Continue button.

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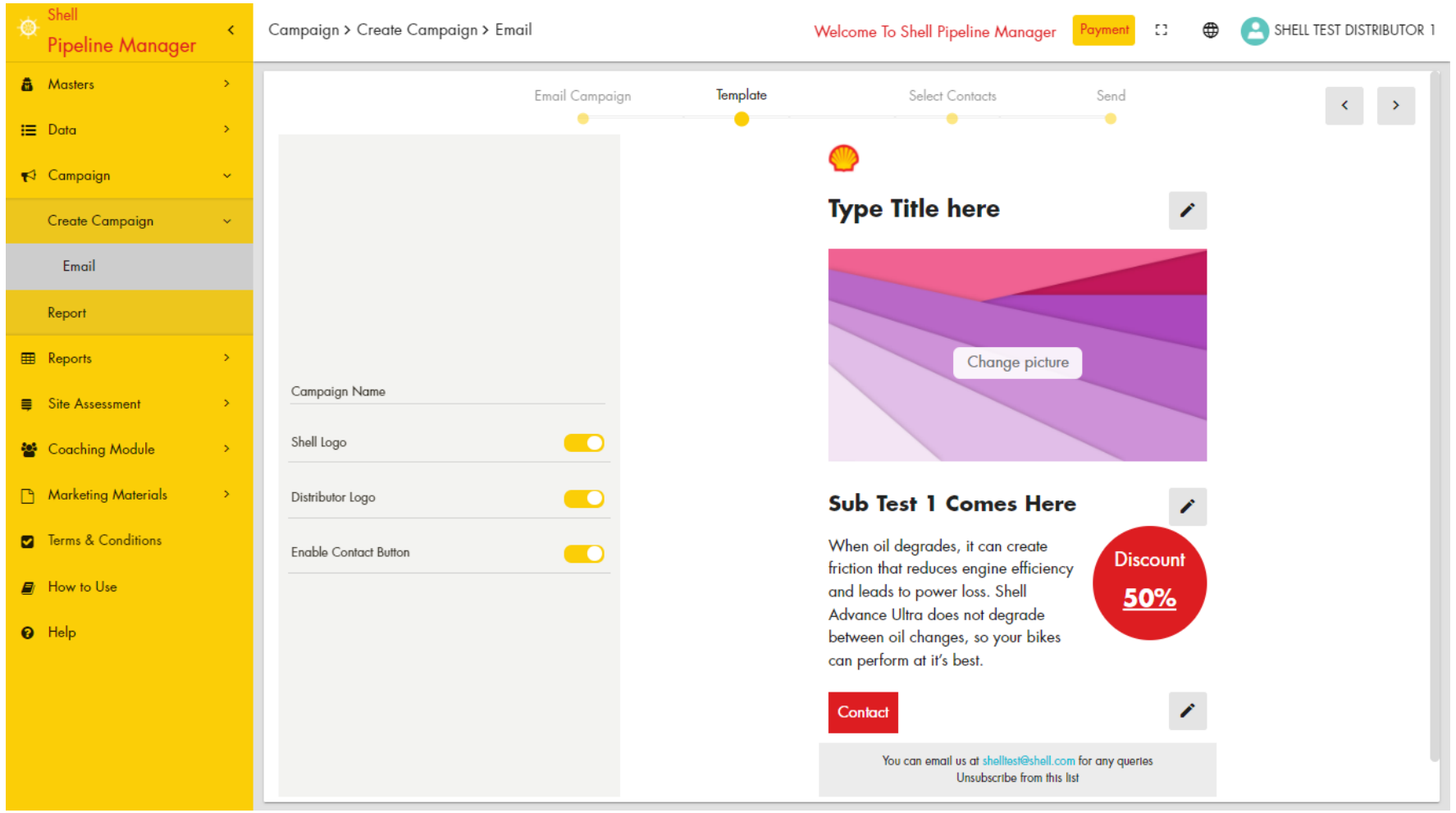
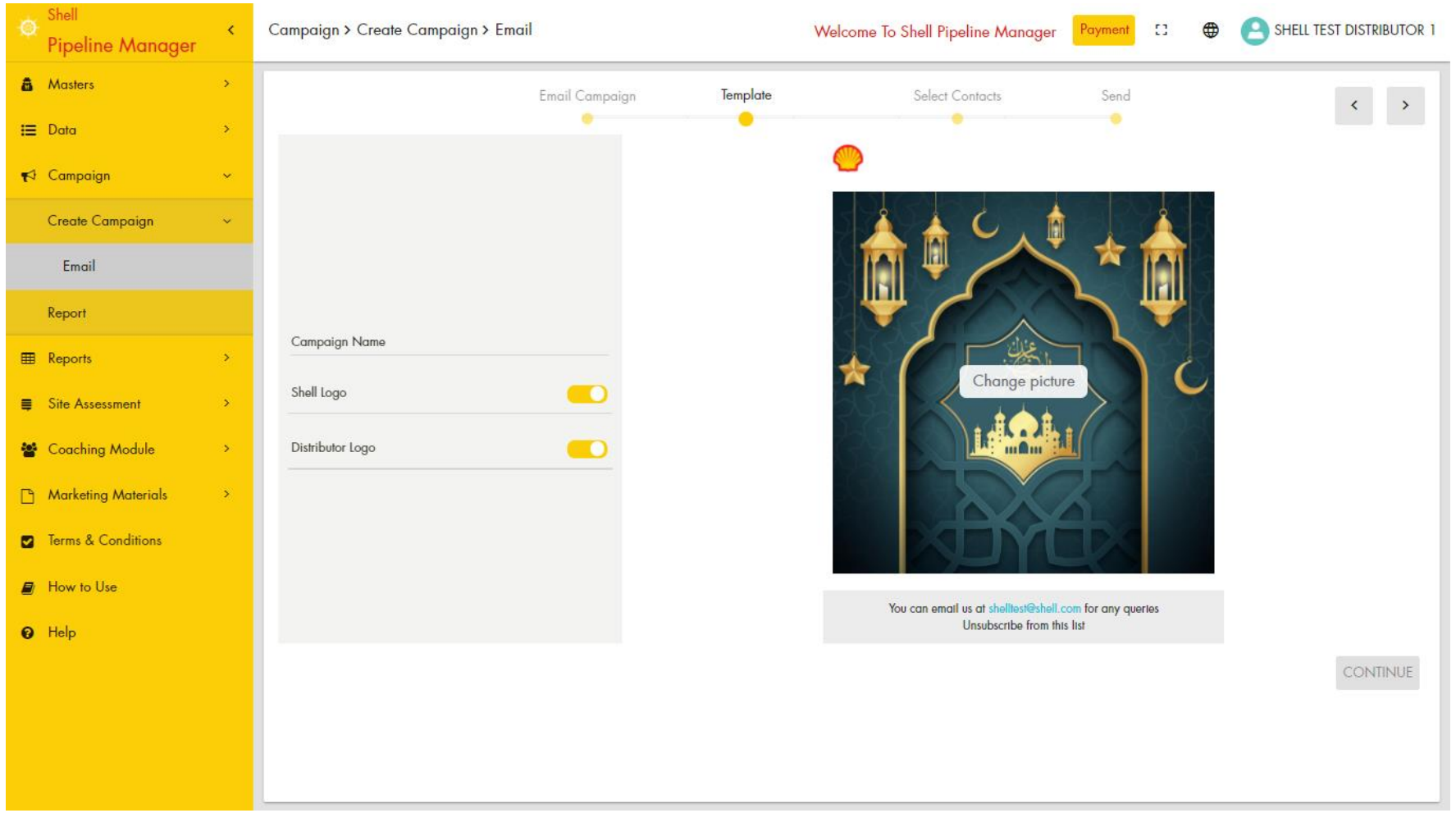
Campaign: Create Campaign - Email



Notes:

- Same as Product demo user can send mail for Discount Product also.

Campaign: Create Campaign - Email



Notes:

- In the Same way Product demo user can send mail for Festival Wishes.

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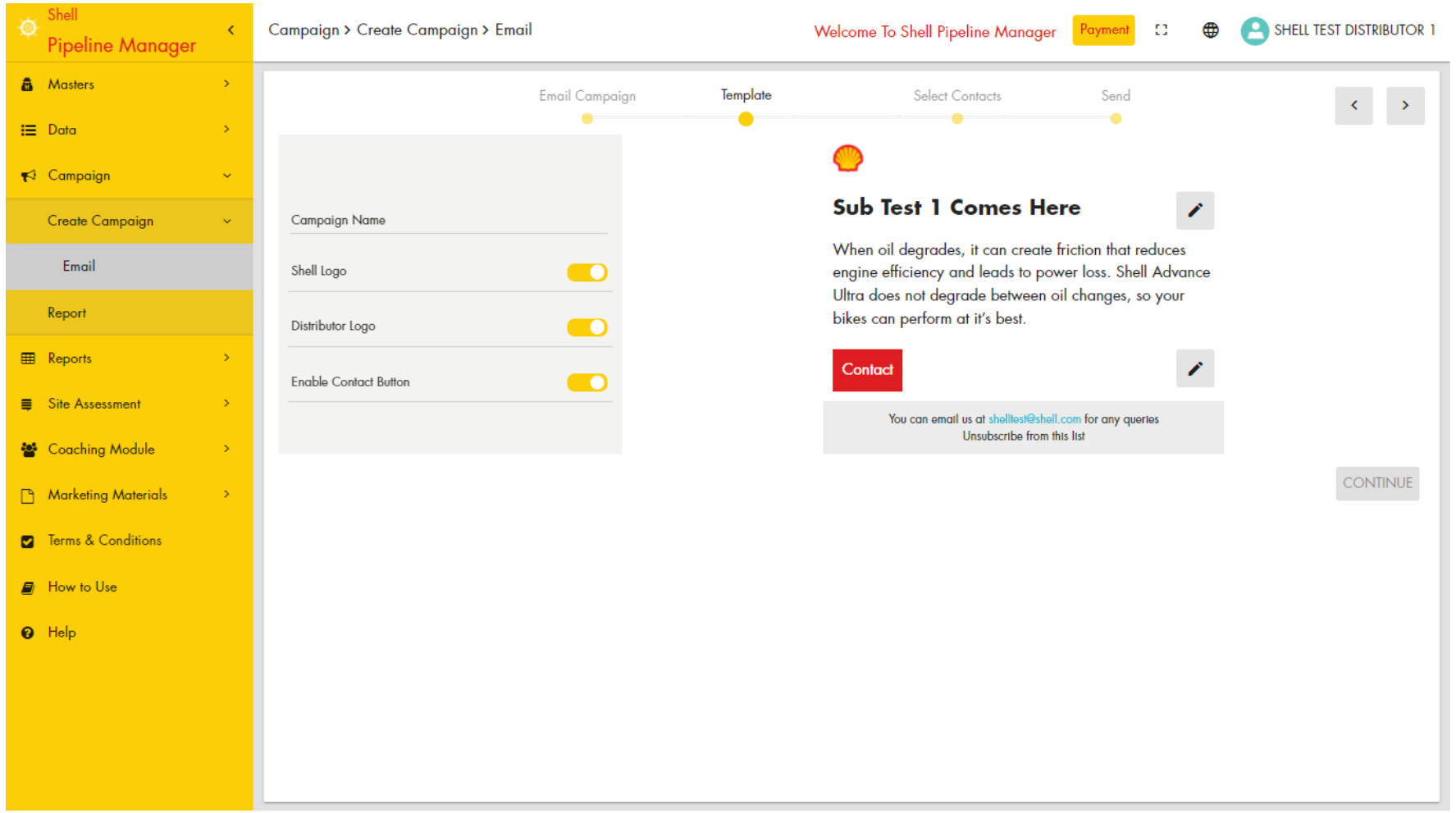
Campaign: Create Campaign - Email



Notes:

- In the same way Product demo user can send mail for General Email.

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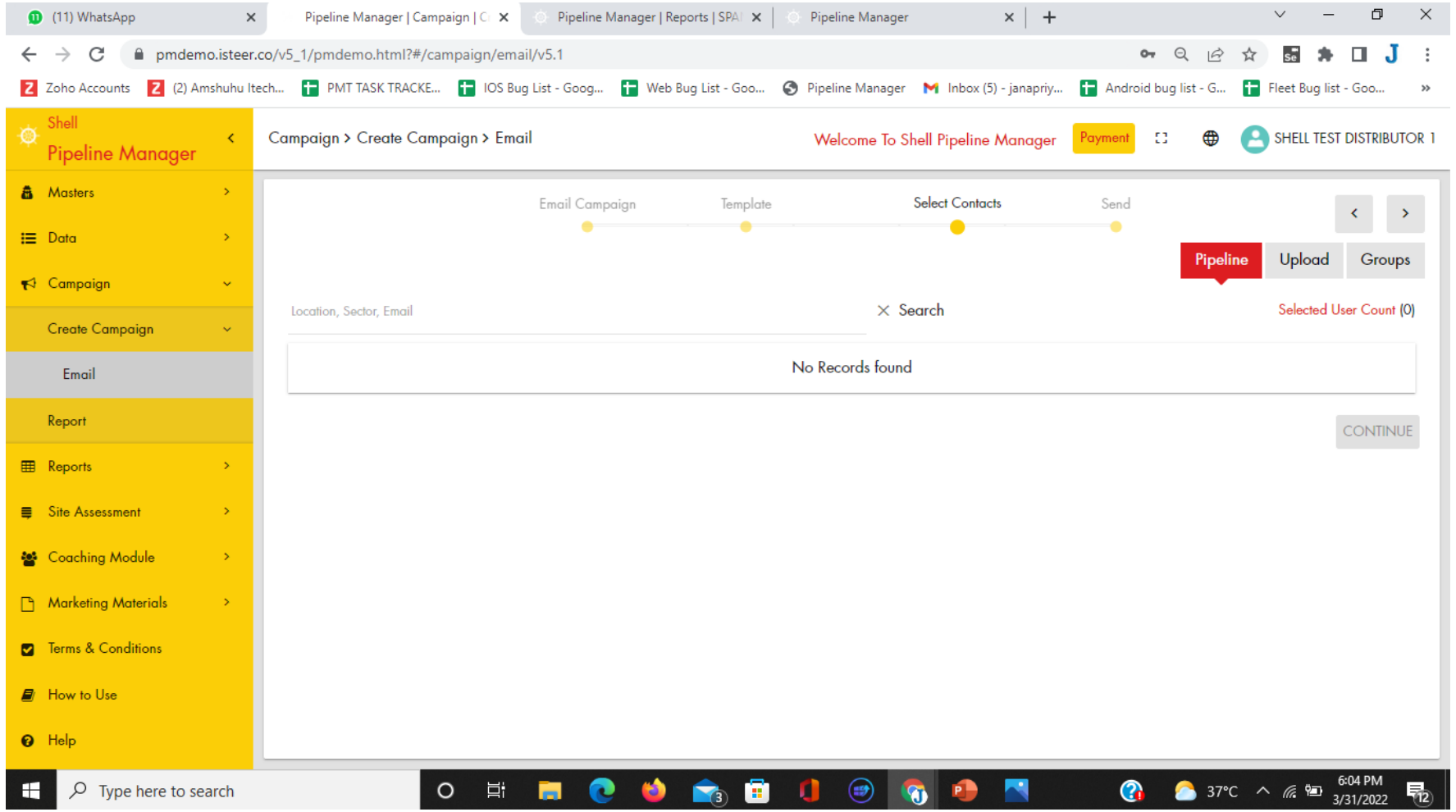
Campaign: Create Campaign - Email



Notes:

- Customers who chose an email campaign and clicked on the action icon will be listed here, along with their email address.

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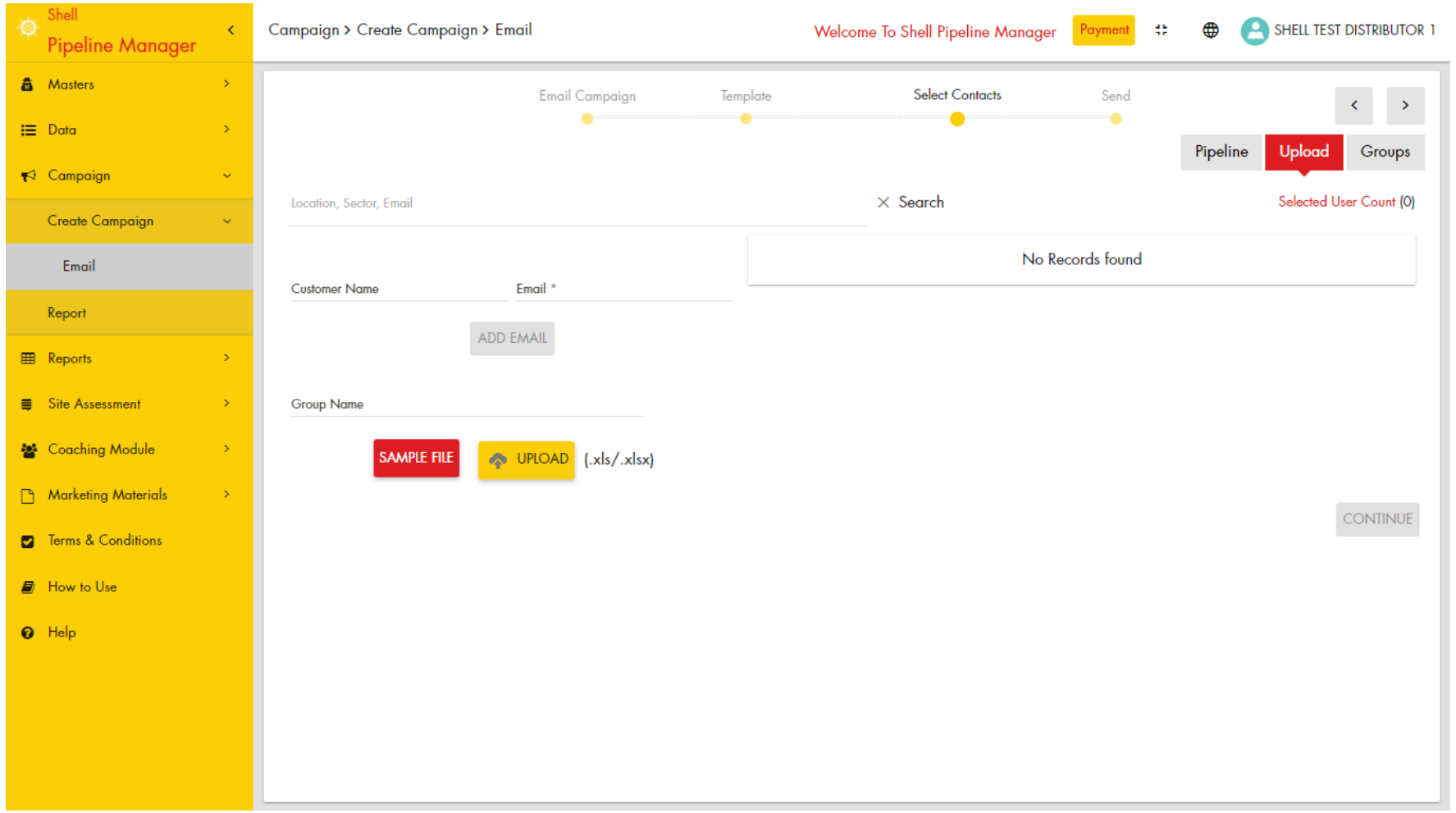
Campaign: Create Campaign - Email



Notes:

- A user can select an email to send.
- User can choose either one customers or can upload multiple customer with the help of a sample file.
- New customers who are not in the pipeline can upload and send email with help of a sample file.

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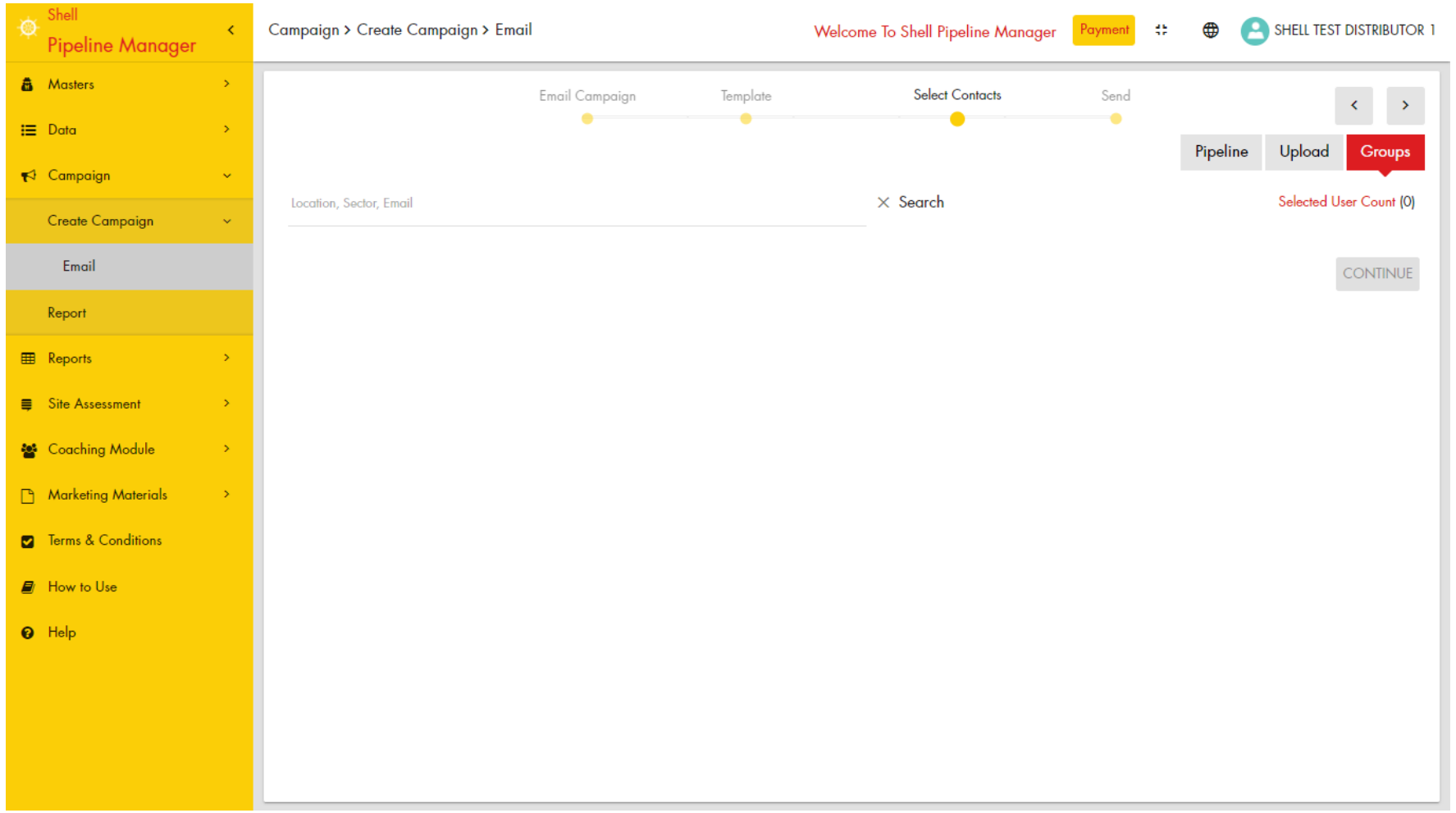
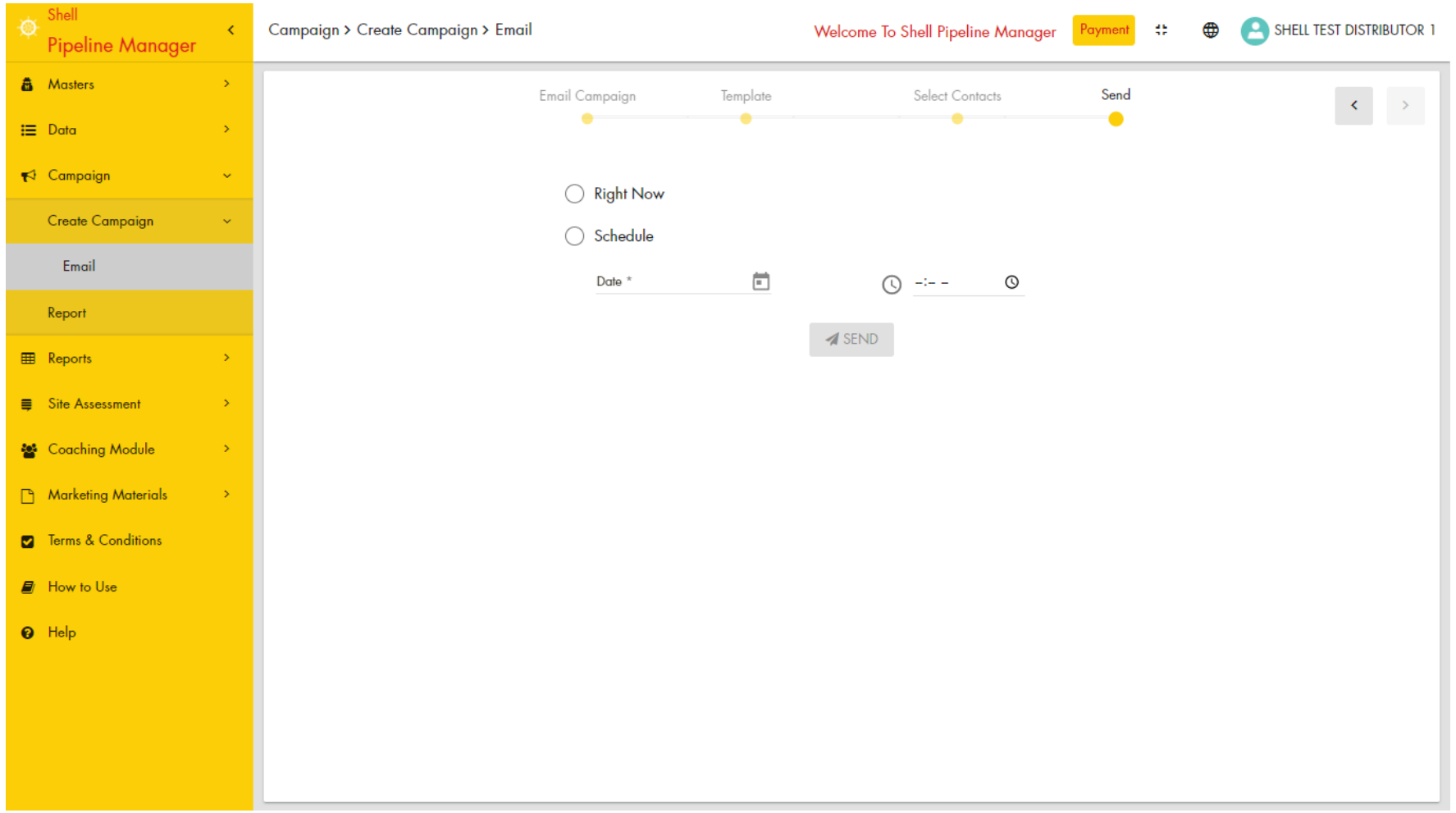
Campaign: Create Campaign - Email



Notes:

- The uploaded customers or selected customers in Upload will be shown in Groups Tab

Campaign: Create Campaign - Email



Notes:

- By clicking "Right Now" will send email immediately
- Click on "Schedule" to send an email at the selected date and time.
- The email will sent every 15 mins. If a user has sent email once after the 15 minutes cron run, it will be sent to the customers.

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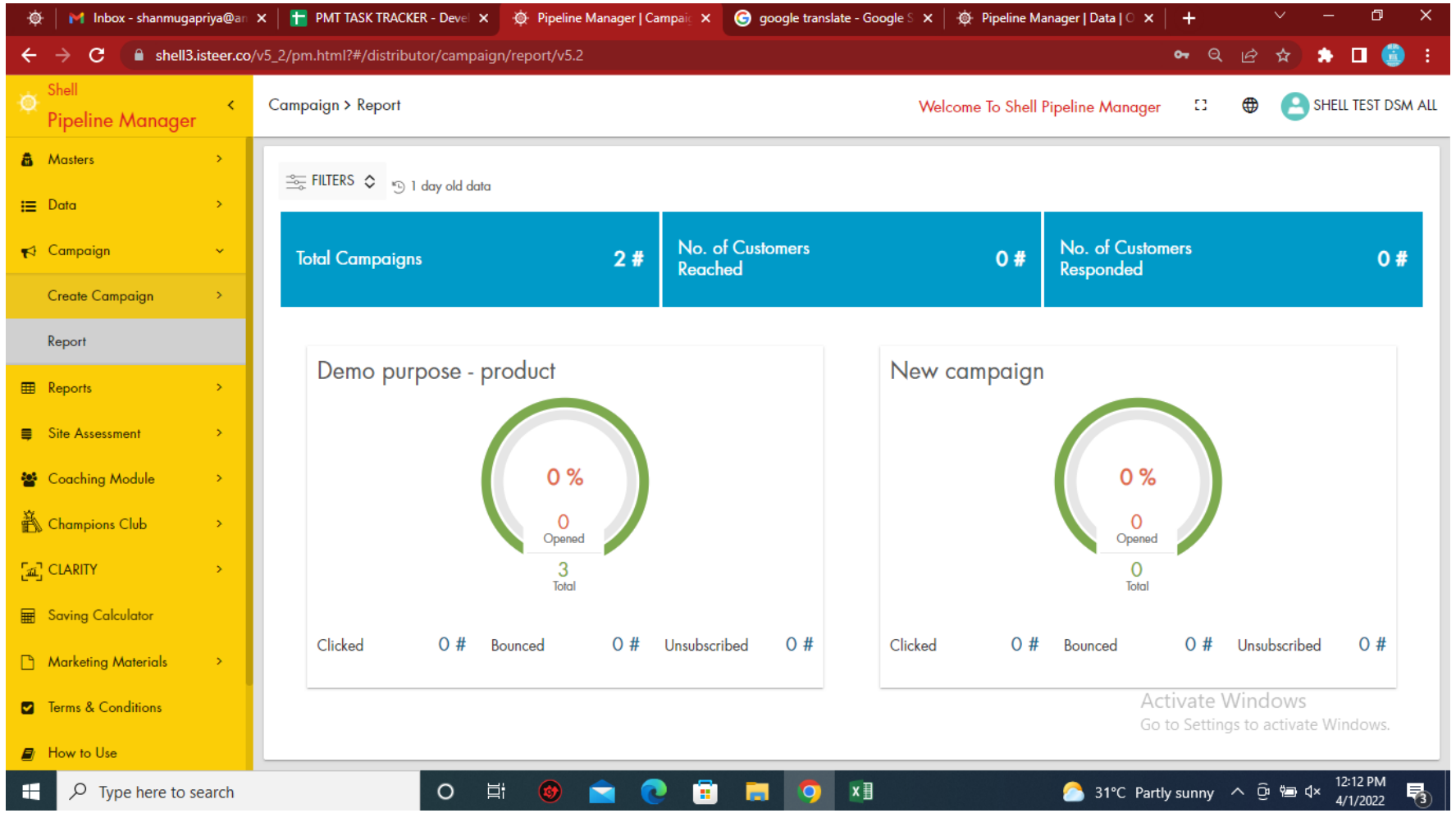
Campaign: Create Campaign - Email



Notes:

- A user can view an overall report of campaign emails like this:
- Total campaign -> Overall Count
- No. of customers Reached -> count of total customers mail has reached
- No. of customers responded -> client response count
- Opened -> Mail open count
- No. of clicked count -> which customers Mark as read.

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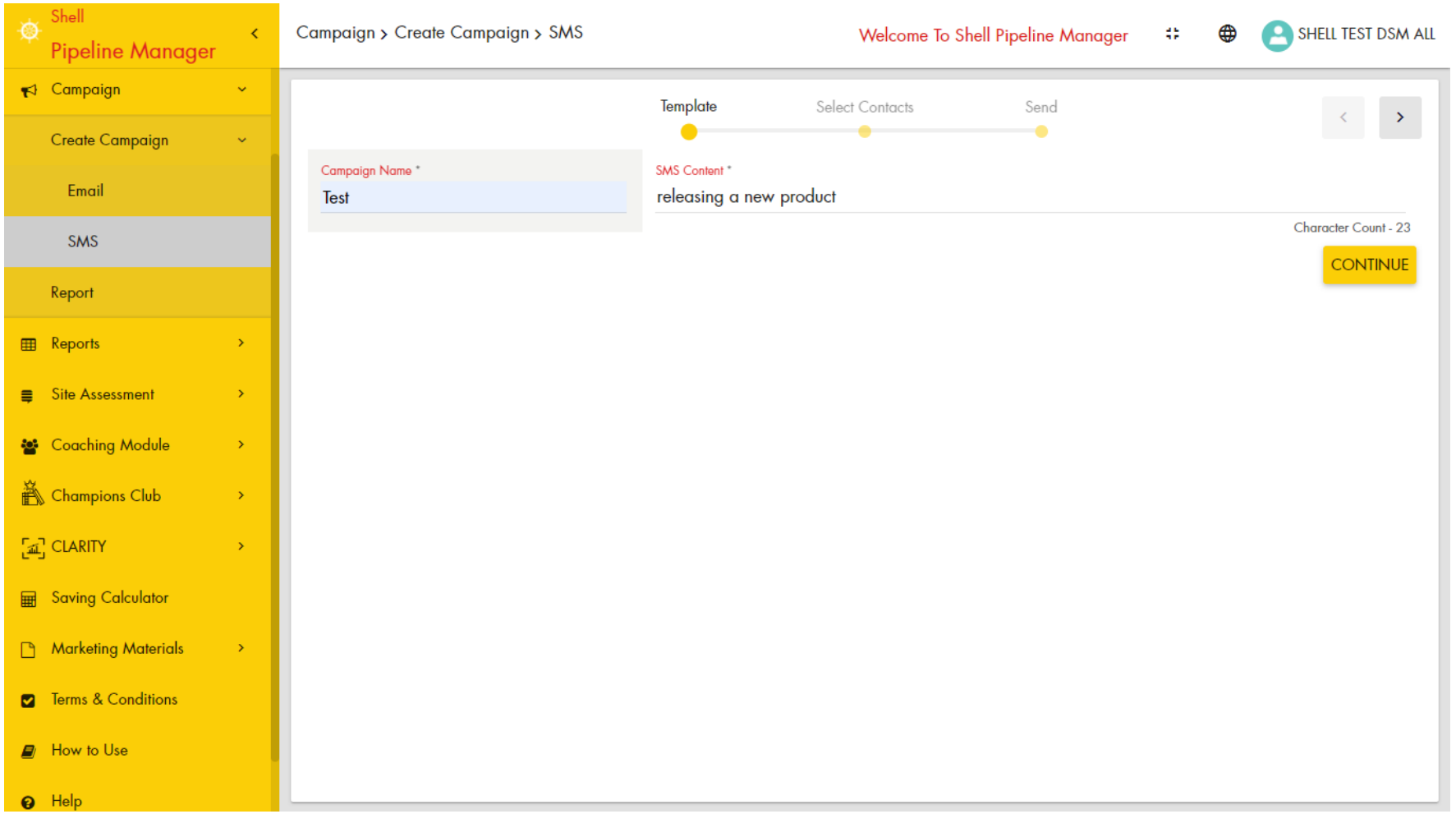
Campaign: Create Campaign - SMS



Notes:

- Users can send SMS campaigns in the same way that they can send email campaigns.
- The template will be as per the screenshot.

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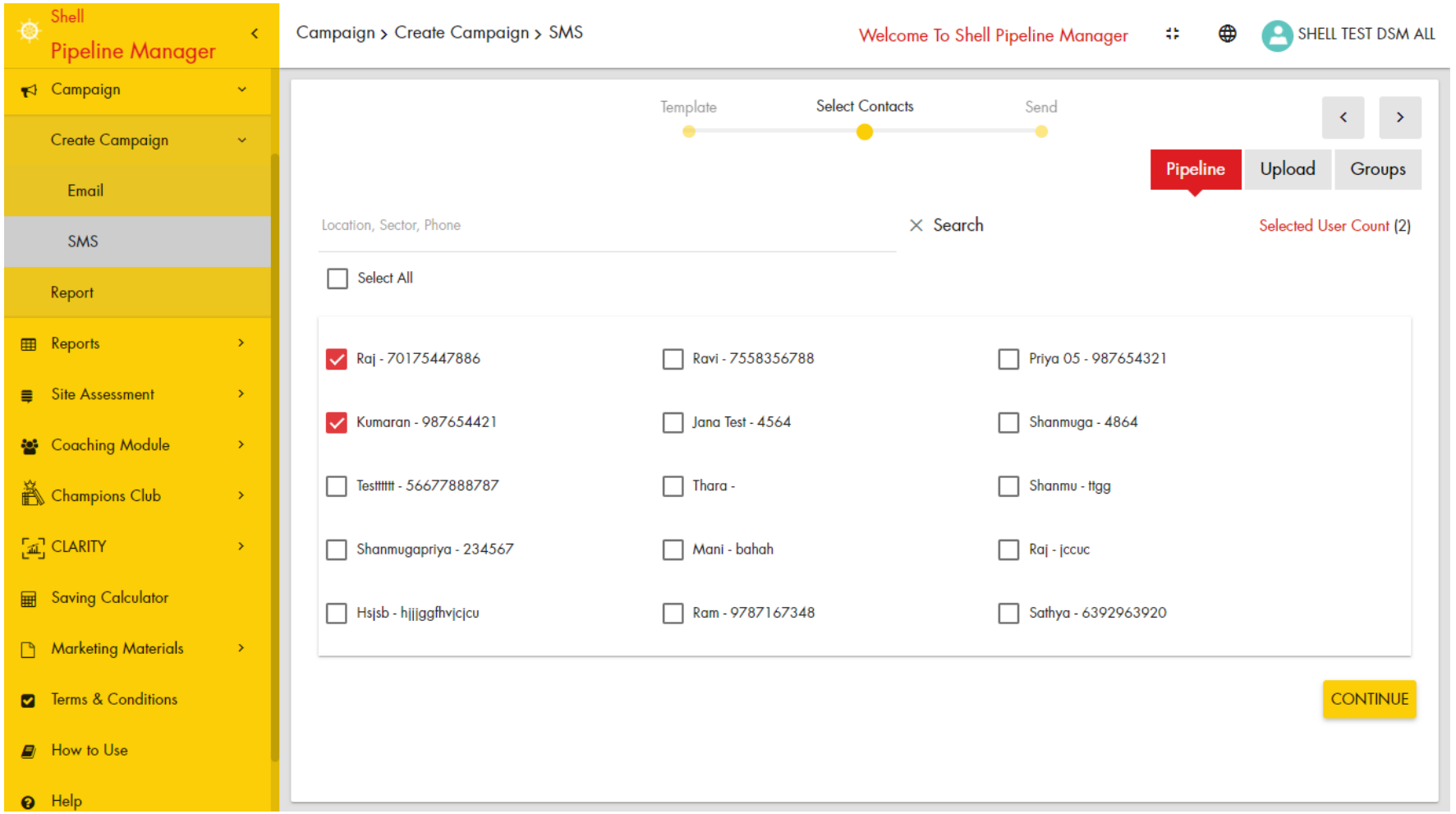
Campaign: Create Campaign - SMS



Notes:

- Similarly to an email campaign, a user can select a customer to send SMS to based on Pipeline, Upload, and Groups

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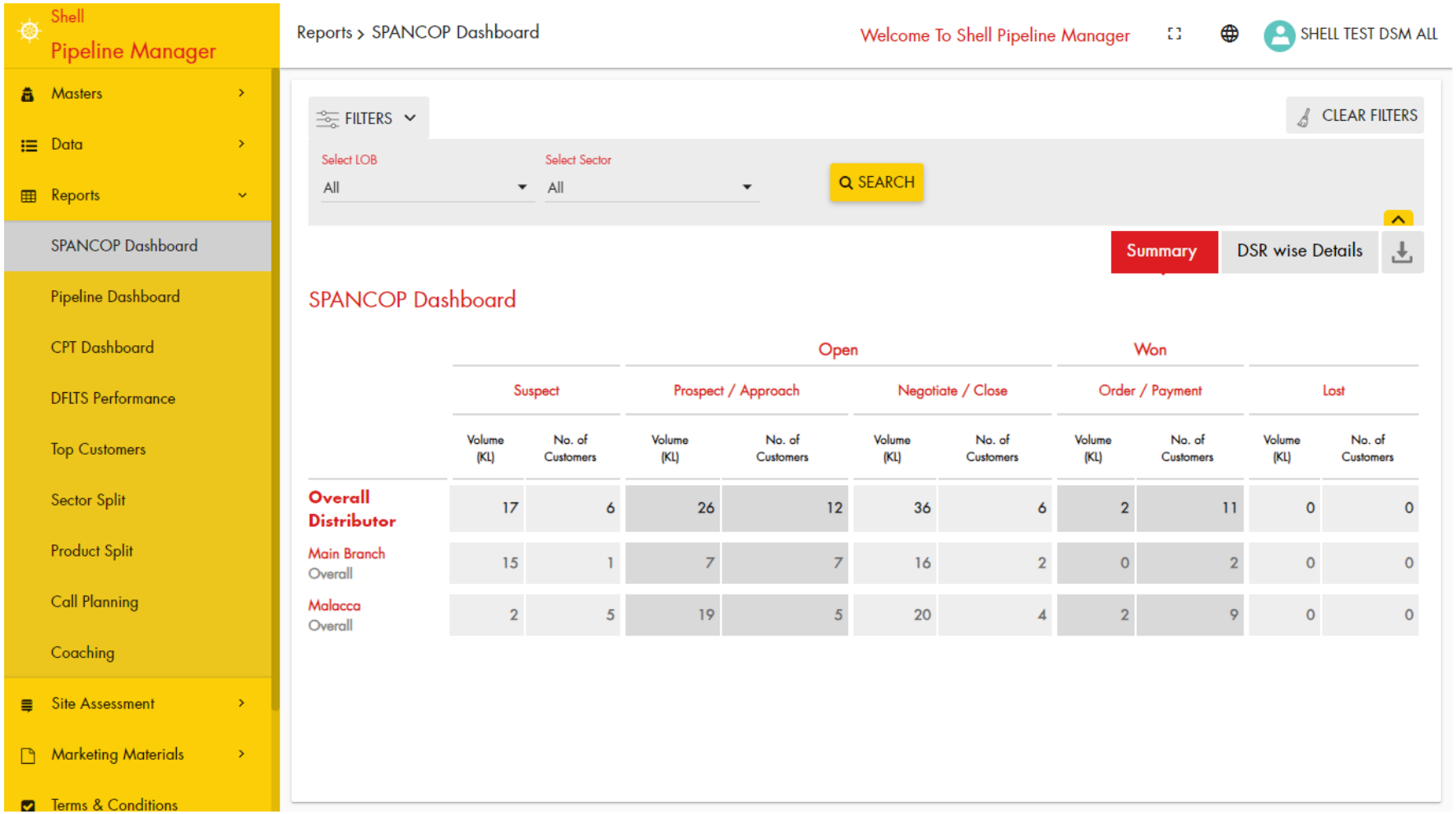
Reports : SPANCOP Dashboard - Summary



Notes:

- DSM can view the Volume and No. Of Customers in SPANCOP Stage here.
- The data is displayed branch wise.
- Click on "DSR wise details" to see the data of the DSR in detail.
- A user can use a filter to see sector and LOB-based data.
- Users can download the report in Excel and PDF format by using the Download symbol.

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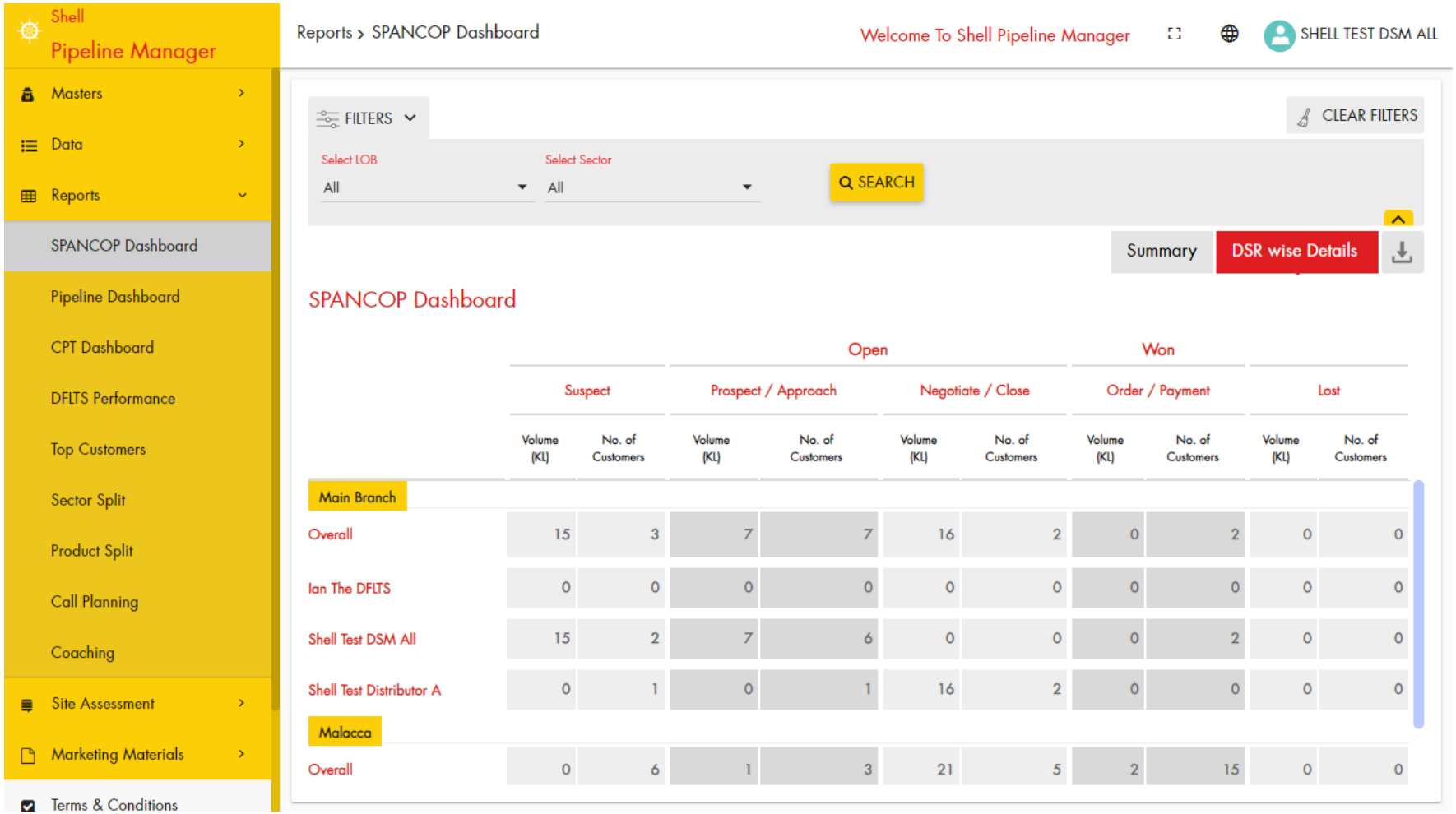
Reports : SPANCOP Dashboard - DSR wise Details



Notes:

- The detailed report screen for the "DSR Wise Details".

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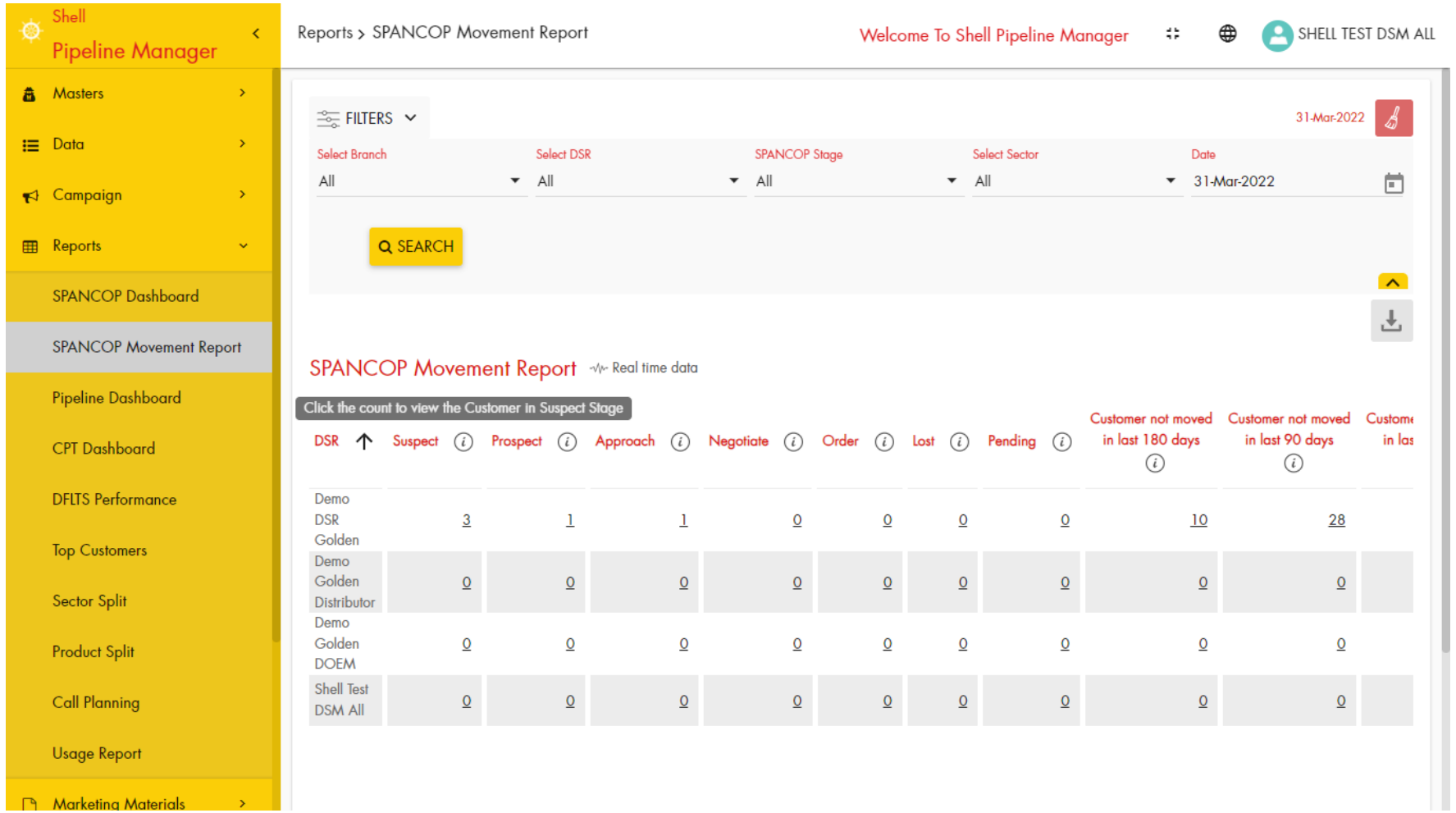
Reports : SPANCOP Movement Report



Notes:

- A Distributor user can view the DSR level of customer movement on SPANCOP Stages in real time.
- Customers who have not moved in the last 180, 90, or 30 days can be viewed by a user.
- If the user has kept the cursor on the (i) icon, information about each stages will be shown in tool tip.
- Based on the filters, the report will be shown
- Date will be displayed as the default current date data.

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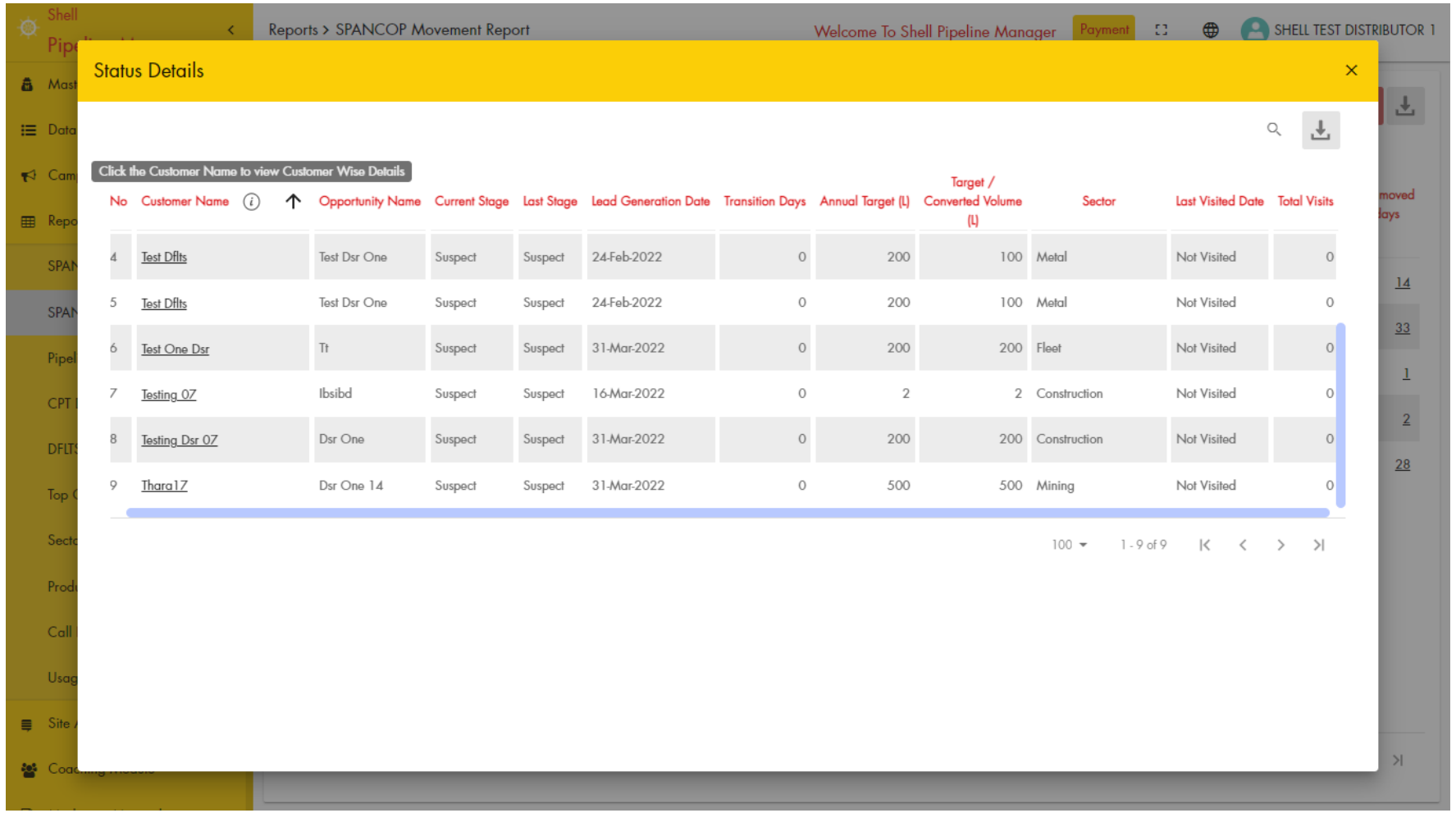
Reports : SPANCOP Movement Report



Notes:

- To view a detailed report of a customer, click on the customer's name
- All the current stages, last stges, lead generation date, transition days, volume, last visit date, and total number of visits can be viewed in detail.
- A user can be able to download the Status Details report

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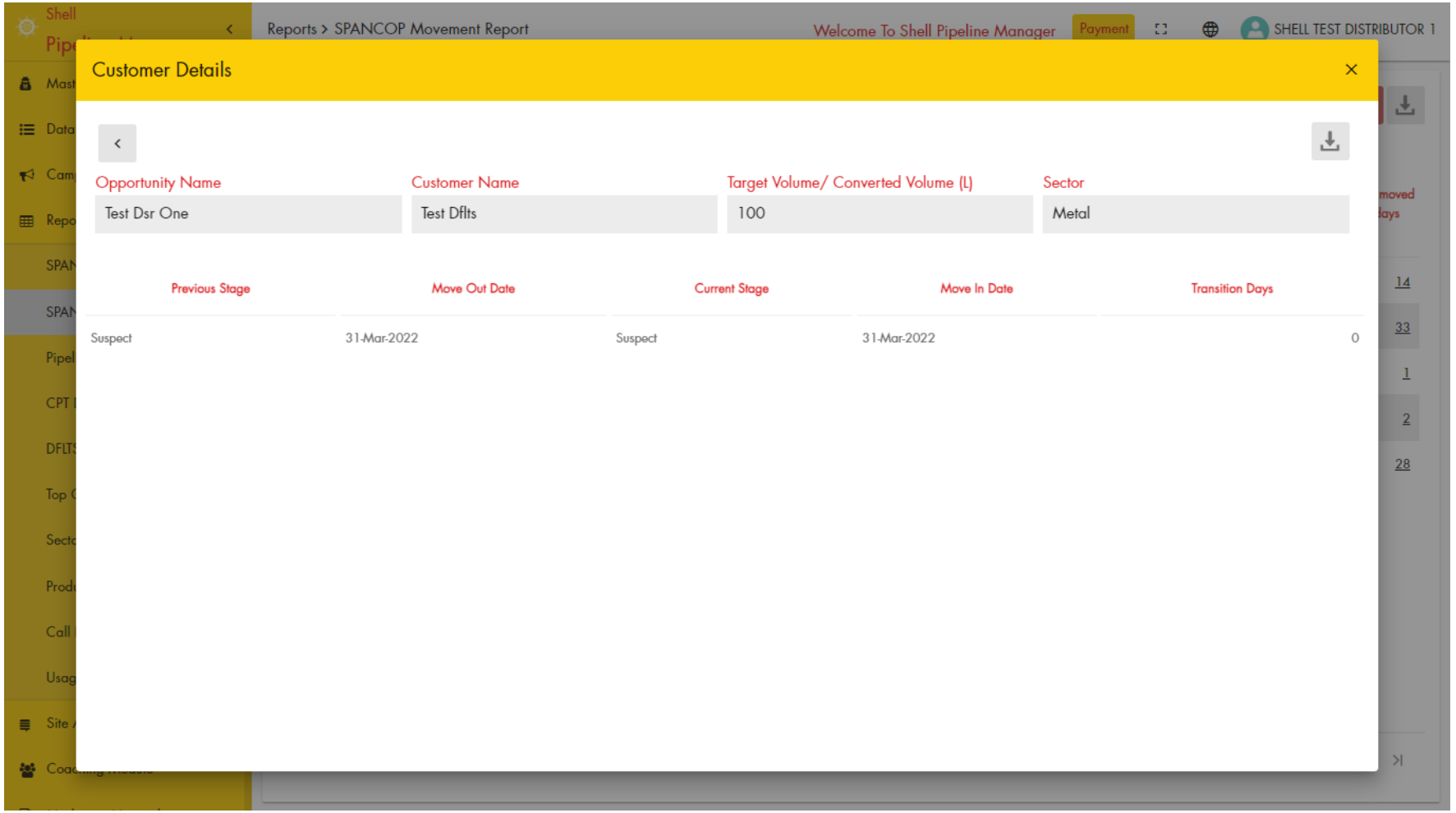
Reports : SPANCOP Movement Report



Notes:

- This is the Customer detail screen of each lead.
- The user will be able to download the report.
- Clicked on the back button it takes to the previous screen.

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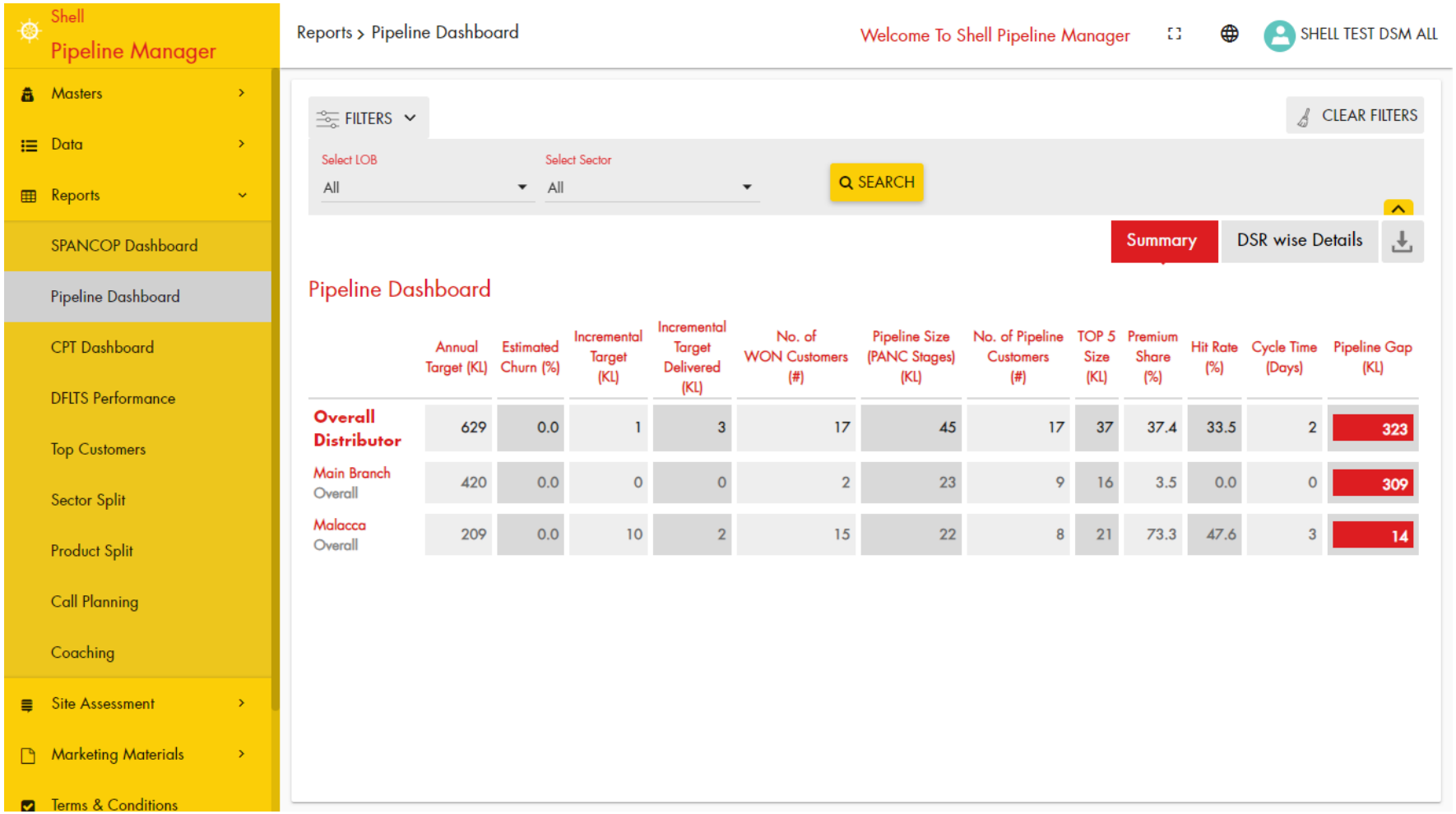
Reports : Pipeline Dashboard - Summary



	Annual Target (KL)	Estimated Churn (%)	Incremental Target (KL)	Incremental Target Delivered (KL)	No. of WON Customers (#)	Pipeline Size (PANC Stages) (KL)	No. of Pipeline Customers (#)	TOP 5 Size (KL)	Premium Share (%)	Hit Rate (%)	Cycle Time (Days)	Pipeline Gap (KL)
Overall Distributor	629	0.0	1	3	17	45	17	37	37.4	33.5	2	323
Main Branch Overall	420	0.0	0	0	2	23	9	16	3.5	0.0	0	309
Malacca Overall	209	0.0	10	2	15	22	8	21	73.3	47.6	3	14

Notes:

- DSM can view the Annual Target, Estimated Churn, Incremental Target, Incremental Target Delivered, No. of WON Customers, Pipeline Size, No, of Pipeline Customers, Top 5, Premium %, Hit Rate, Cycle Time, and Pipeline Gap here.
- The data is displayed branch wise.
- Click on DSR wise details to see the data of the DSR in detail.

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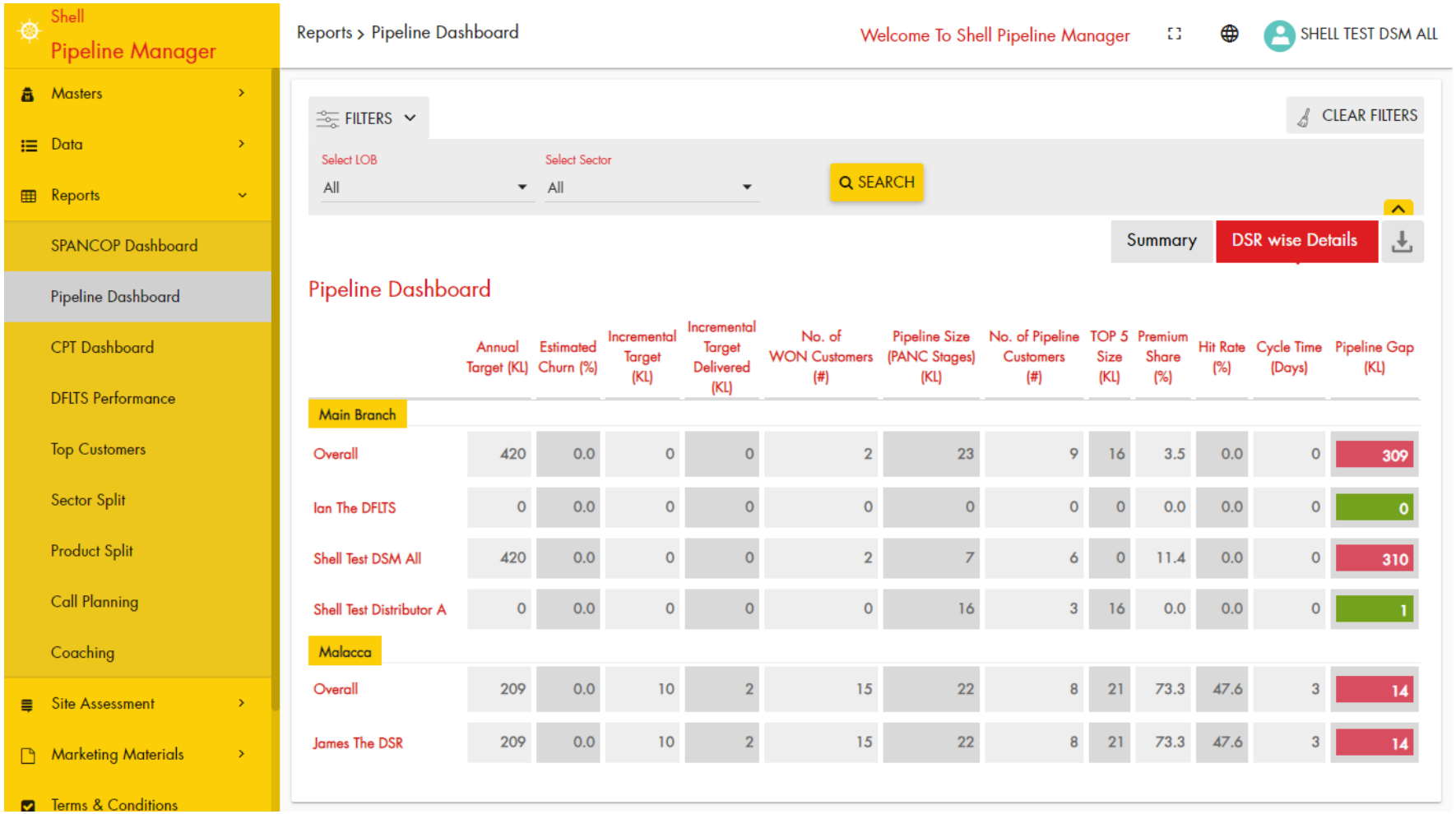
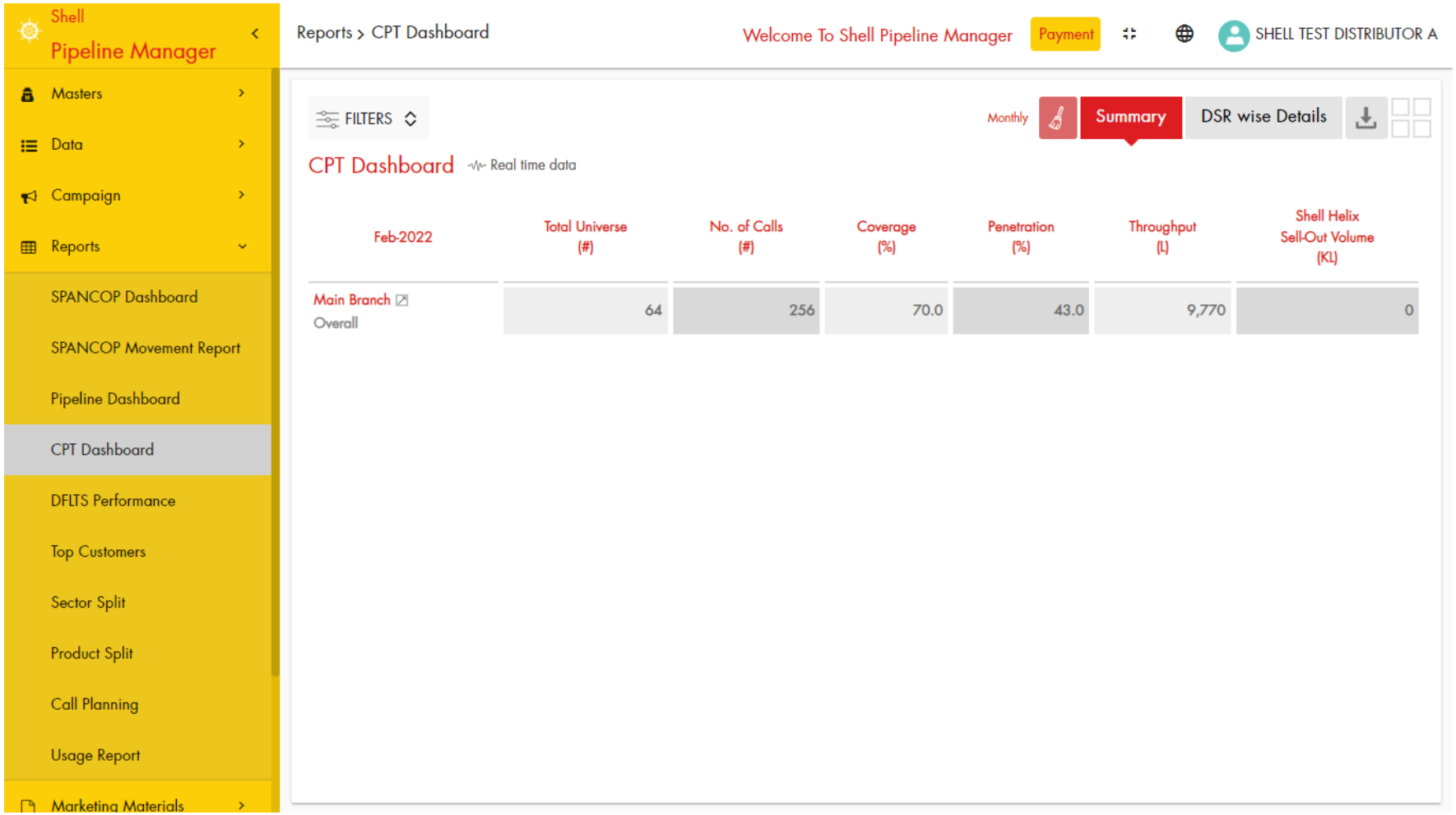
Reports : Pipeline Dashboard – DSR wise Details



Notes:

- Detailed report screen for the "DSR wise Details".
- Users can use filters to see sector and LOB-based data.
- Users can download the report in Excel and PDF format by using the Download symbol.

Reports : CPT Dashboard - Summary



Notes:

- CPT Dashboard contains the details of Coverage, penetration, Throughput, No. of calls, Total Universe, and Shell Helix Sell-Out Volume.
- The data is displayed branch wise.
- Click "DSR Wise Details" to see the data of the DSR in detail.
- Select Monthly or Quarterly to view CPT based on monthly or quarterly.

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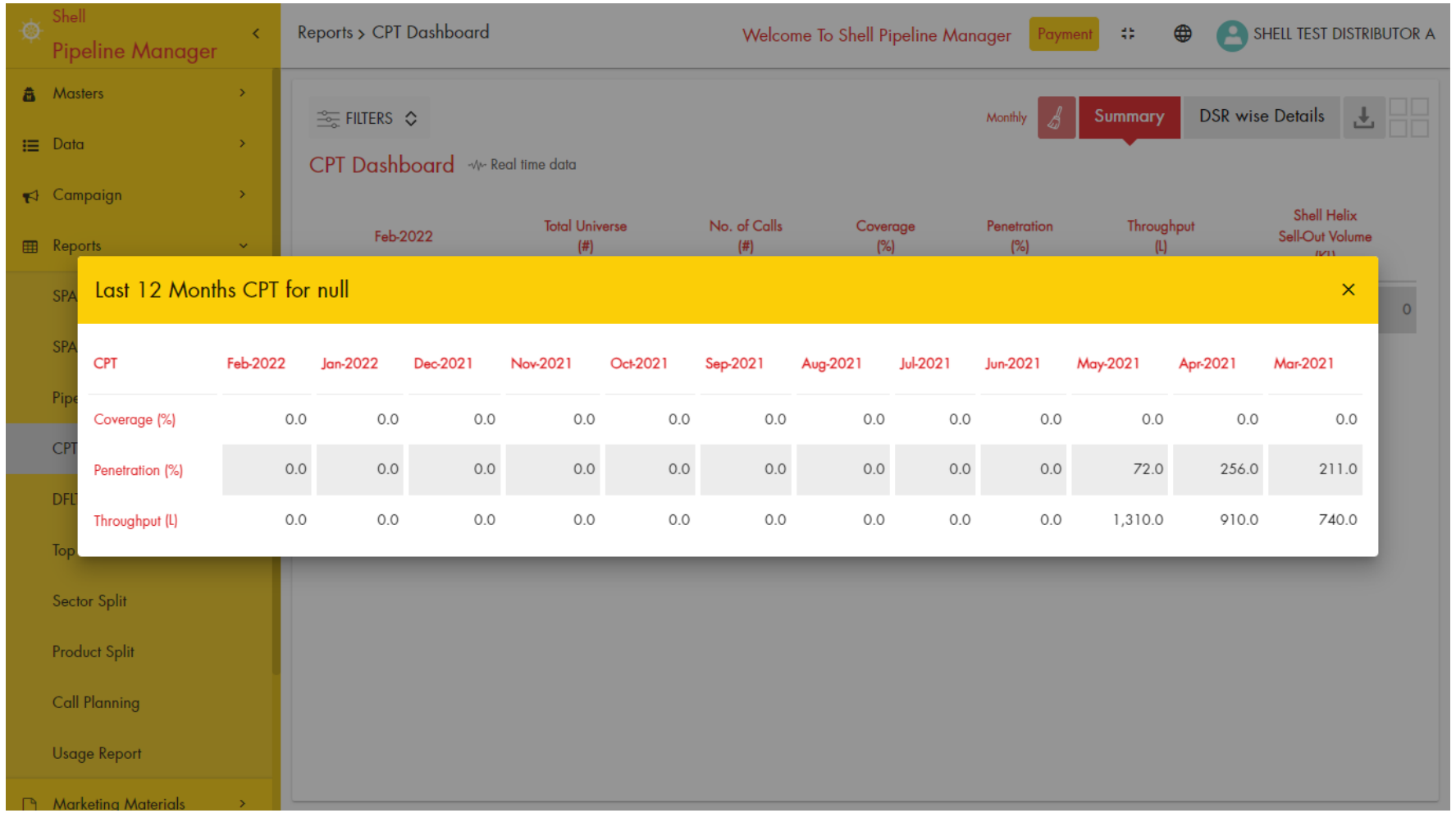
Reports : CPT Dashboard - Summary



CPT	Feb-2022	Jan-2022	Dec-2021	Nov-2021	Oct-2021	Sep-2021	Aug-2021	Jul-2021	Jun-2021	May-2021	Apr-2021	Mar-2021
Coverage (%)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Penetration (%)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	72.0	256.0	211.0
Throughput (L)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1,310.0	910.0	740.0

Notes:

- Click on the branches to get a branch wise CPT report.
- Additionally user can view CPT based on individual users.
- The data includes the last 12 months of CPT for the main branch.
- DSM can see the month-wise data and can also filter the quarterly data for the particular DSR with a particular Branch.

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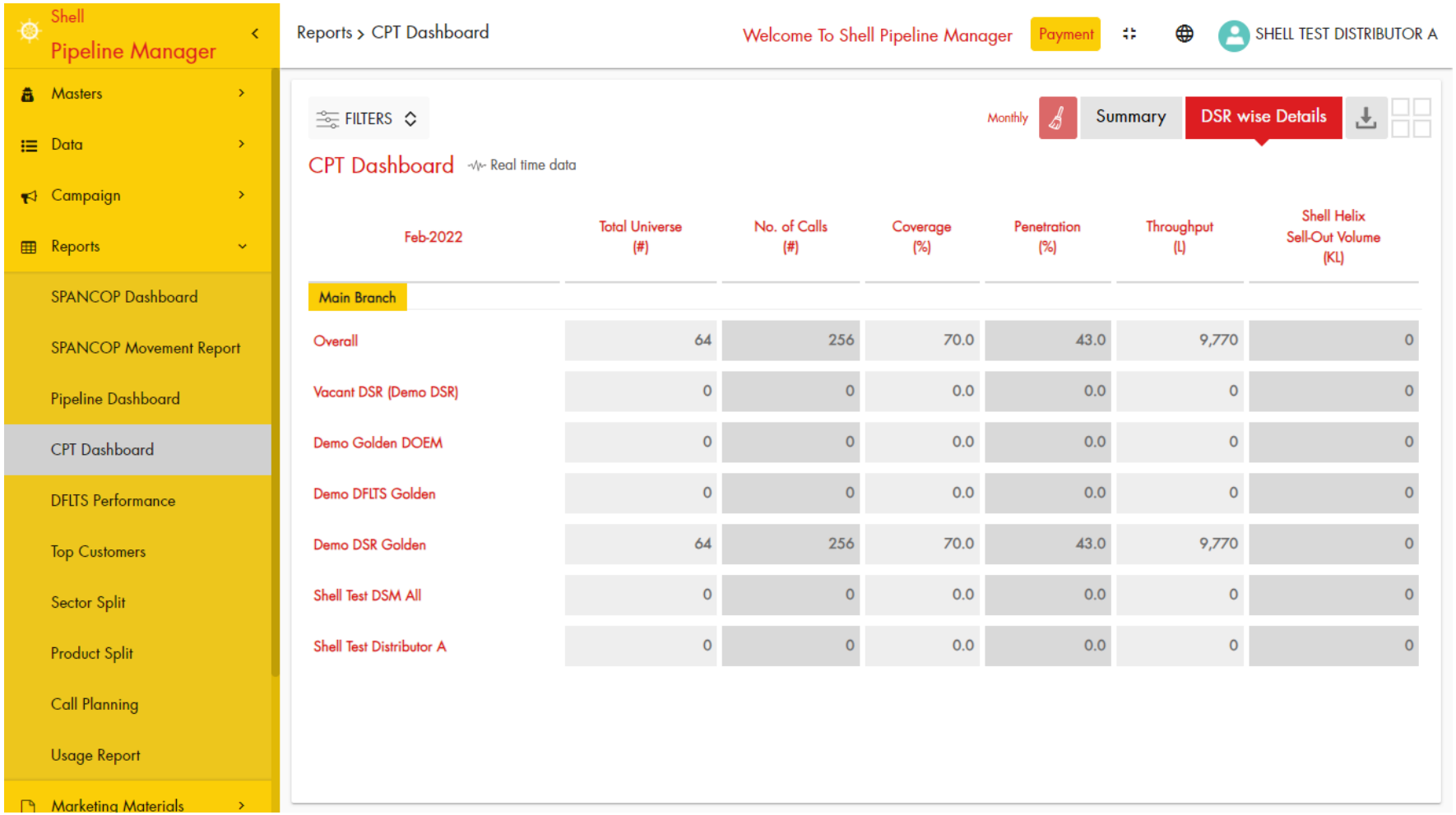
Reports : CPT Dashboard - DSR wise Details



Feb-2022	Total Universe (#)	No. of Calls (#)	Coverage (%)	Penetration (%)	Throughput (L)	Shell Helix Sell-Out Volume (KL)
Main Branch						
Overall	64	256	70.0	43.0	9,770	0
Vacant DSR (Demo DSR)	0	0	0.0	0.0	0	0
Demo Golden DOEM	0	0	0.0	0.0	0	0
Demo DFLTS Golden	0	0	0.0	0.0	0	0
Demo DSR Golden	64	256	70.0	43.0	9,770	0
Shell Test DSM All	0	0	0.0	0.0	0	0
Shell Test Distributor A	0	0	0.0	0.0	0	0

Notes:

- CPT Dashboard contains the details of Coverage, penetration, Throughput, No. of calls, Total Universe, and Shell Helix Sell-Out Volume.
- Clicking on DSR Wise Details will show CPT reports based on individual users.
- Users can use filters to see sector and LOB-based data.
- Users can download the report in Excel and PDF format by using the download symbol.

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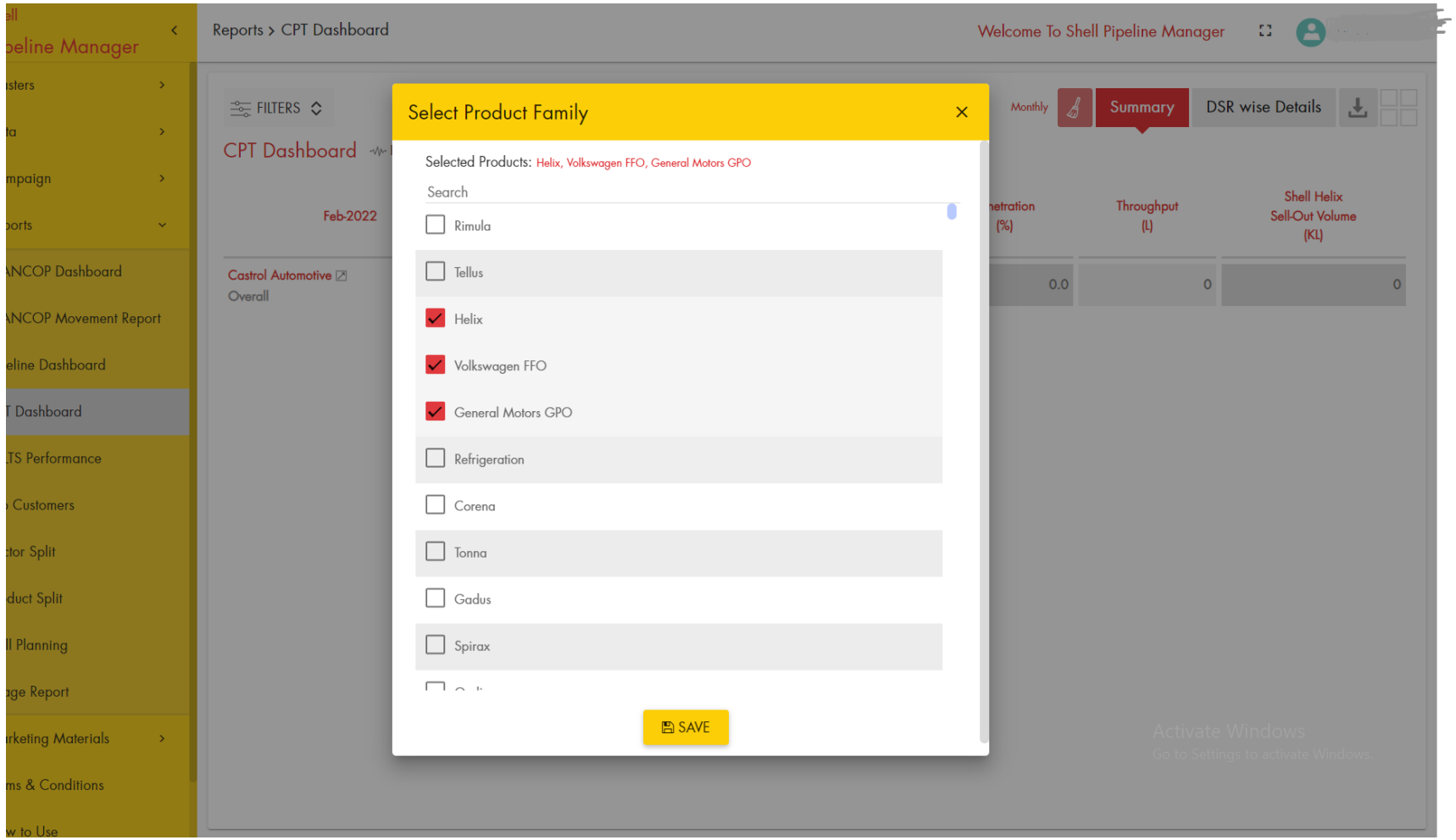
Reports : CPT Dashboard - DSR wise Details



Notes:

- By clicking the product icon, a user can be able to selecta maximum of three products to view the sell out volume.
- Selected product volume will be shown in the CPT dashboard

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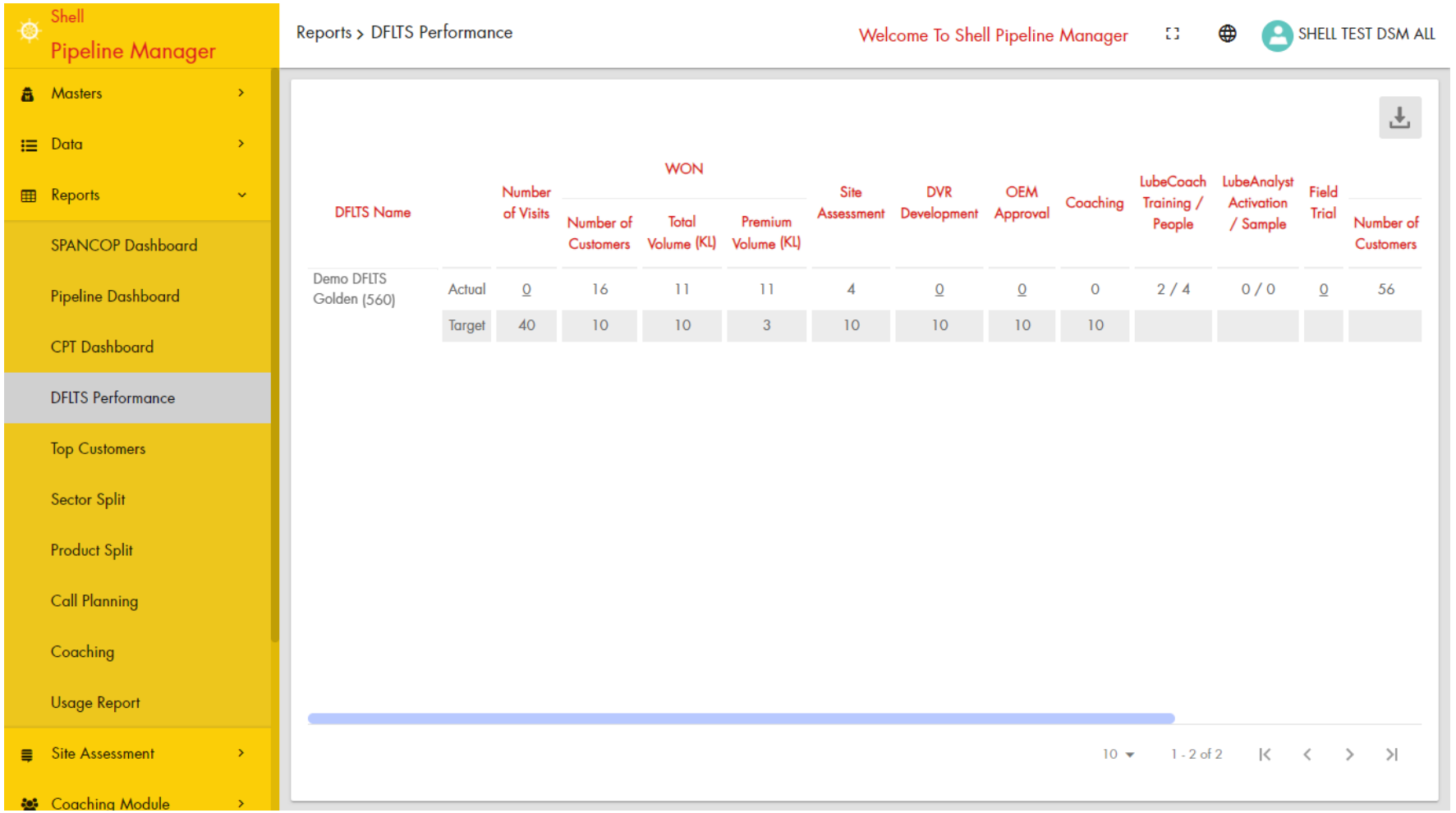
Reports : DFLTS Performance



Notes:

- "DFLTS performance" includes the following information: DFLTS Name, No.of Visits, WON Customers details, Site Assessment, DVR Development , OEM Approval ,Coaching, Lube Coach Training, Lube Analyst Activation, Field Trial, No.of . Customers.
- DSM can view the details branch wise and brand wise using the filters.

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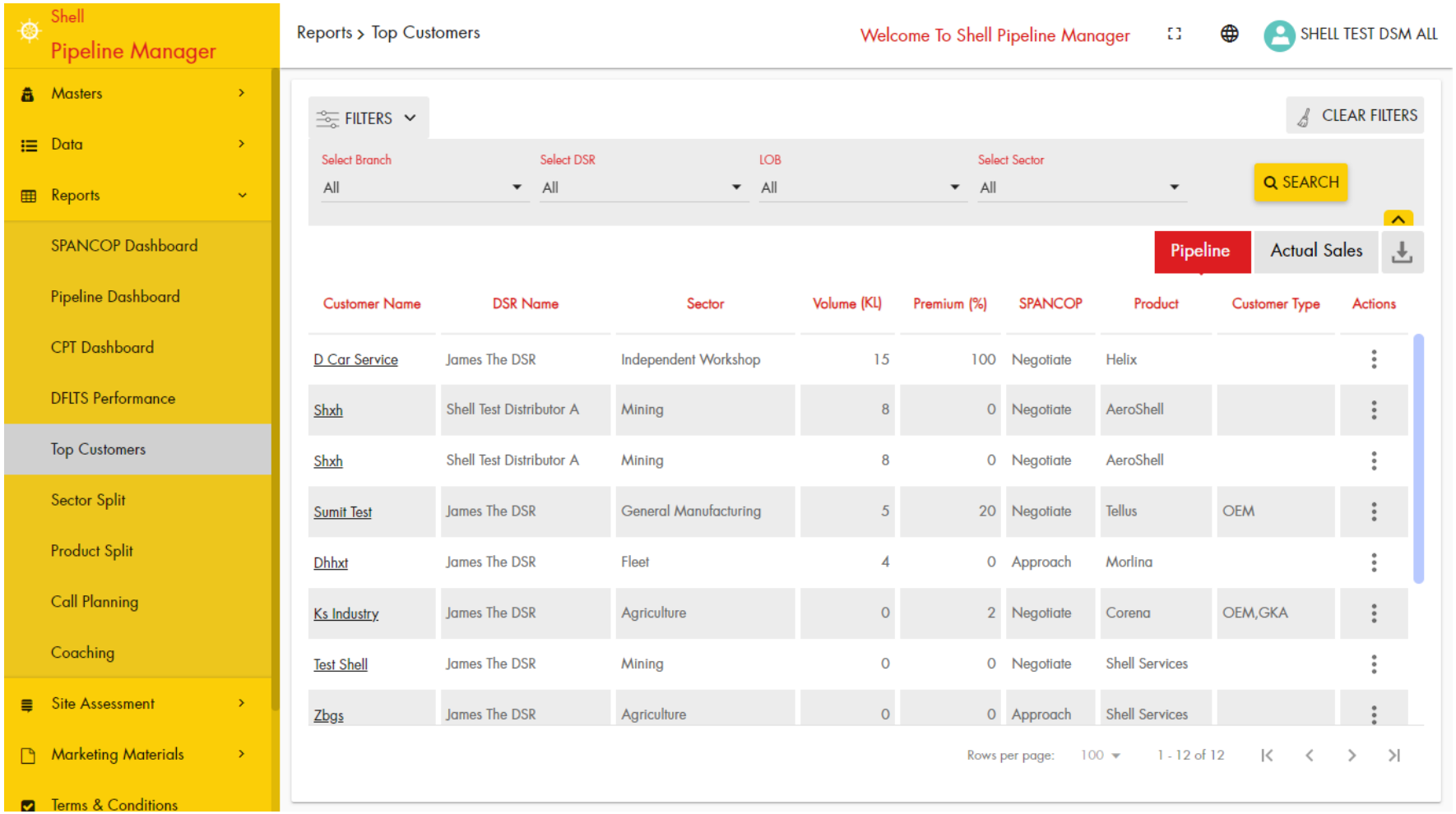
Reports : Top Customers - Pipeline



Notes:

- "Top Customers" contains details like Customer Name, DSR Name, Sector, Volume, SPANCOP, Product, Premium, Customer Type, and Actions for Pipeline.
- Users can use filters to view Branch, DSR, LOB, and Sector based data.
- Even if the top customers have the sustainability product enabled, it will be displayed.
- Click on any opportunity to view a detailed report screen regarding that opportunity.
- Users can download the report in Excel and PDF format by using the Download symbol.

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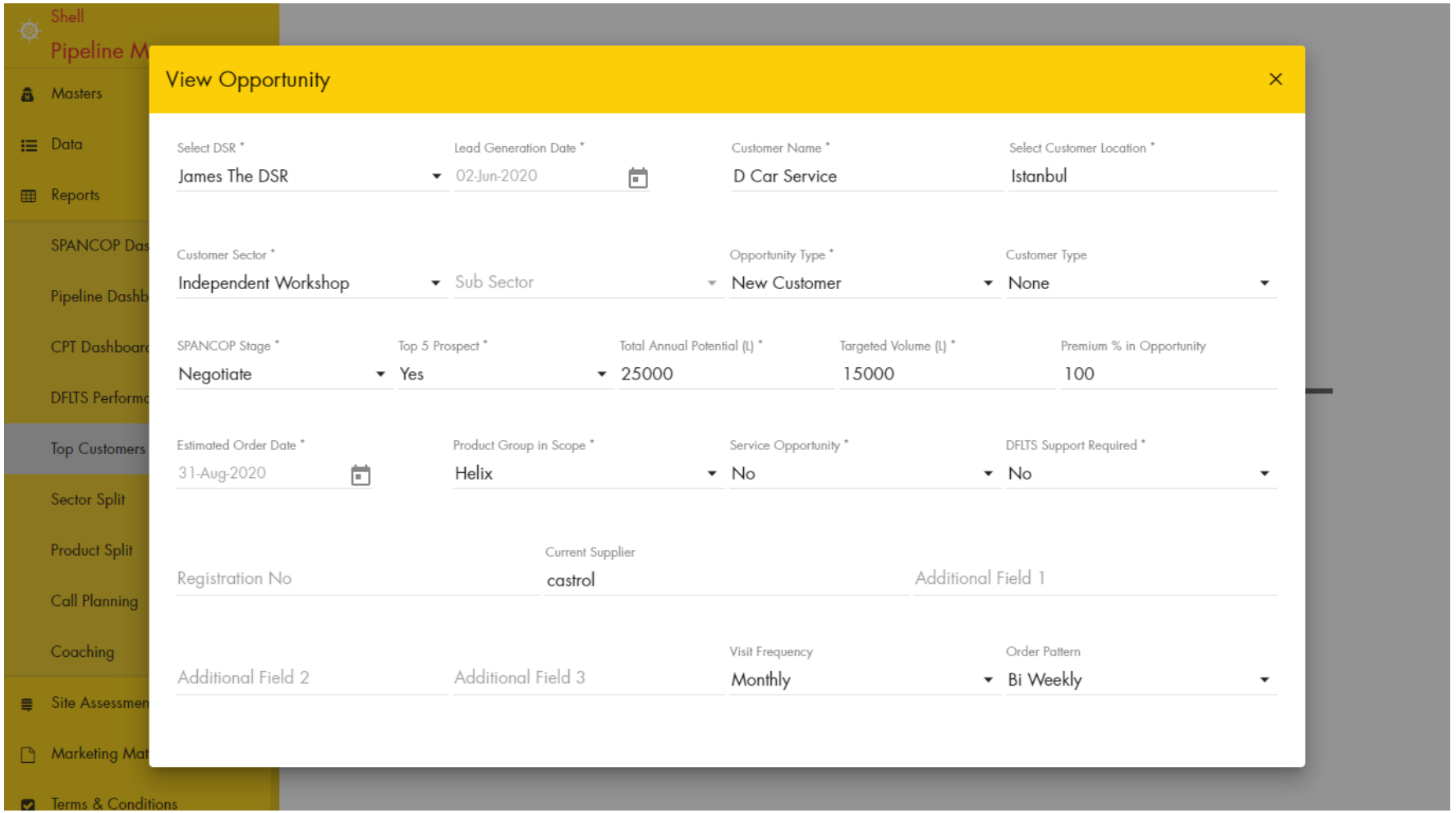
Reports : Top Customers - Pipeline



Notes:

- The detailed report screen for the selected opportunity.
- DSM can only view these details; they can't edit them.

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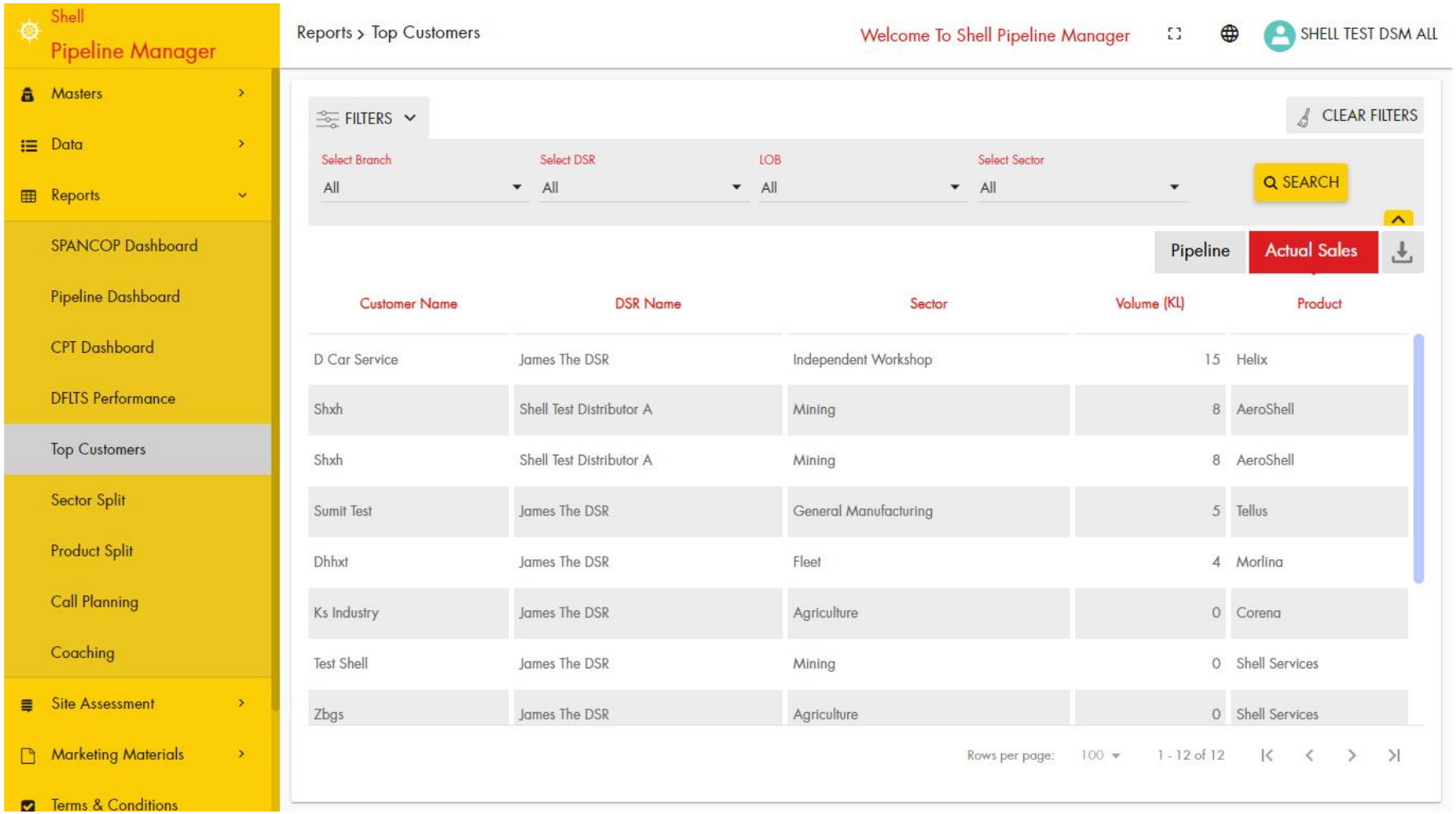
Reports : Top Customers – Actual Sales



Notes:

- The "Top 5 Customer "contains details like Customer Name, DSR Name, Sector, Volume, Product for Actual sales.
- Users can use filters to view Branch, DSR, LOB, and Sector-based data.
- Users can download the report in Excel and PDF format by using the Download symbol.

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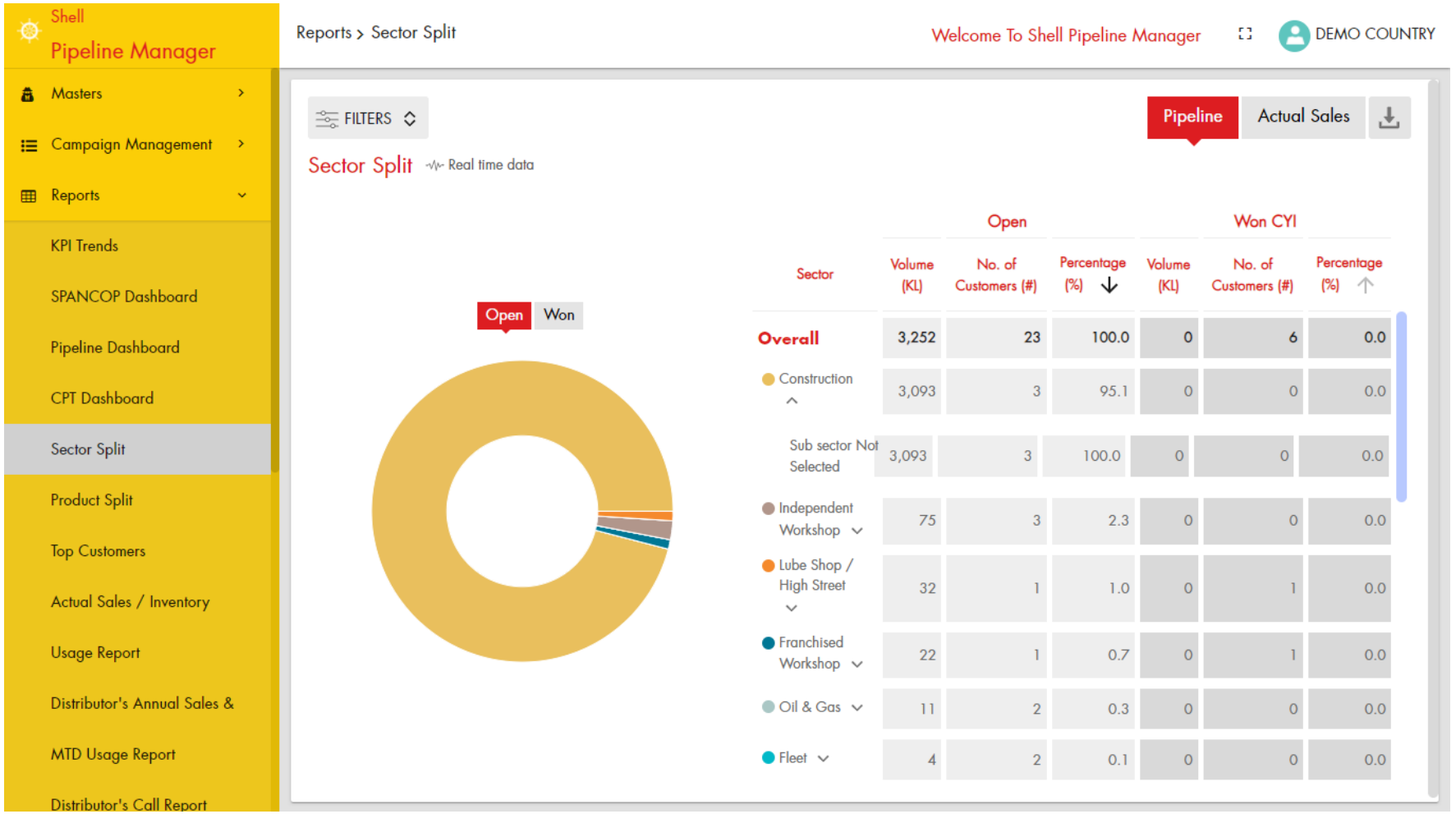
Reports : Sector Split - Pipeline



Notes:

- Sector Split contains the reports about the information about each sector, subsector, volume, no. of customers.
- DSM can see the sector and subsector report through the Pie chart view.
- Users can see sector split for Pipeline and Actual sales.
- User can also use filter to see the Branch, DSR, Product, and SPANCOP level sector report.
- User can download sector split in excel and PDF by using download symbol.

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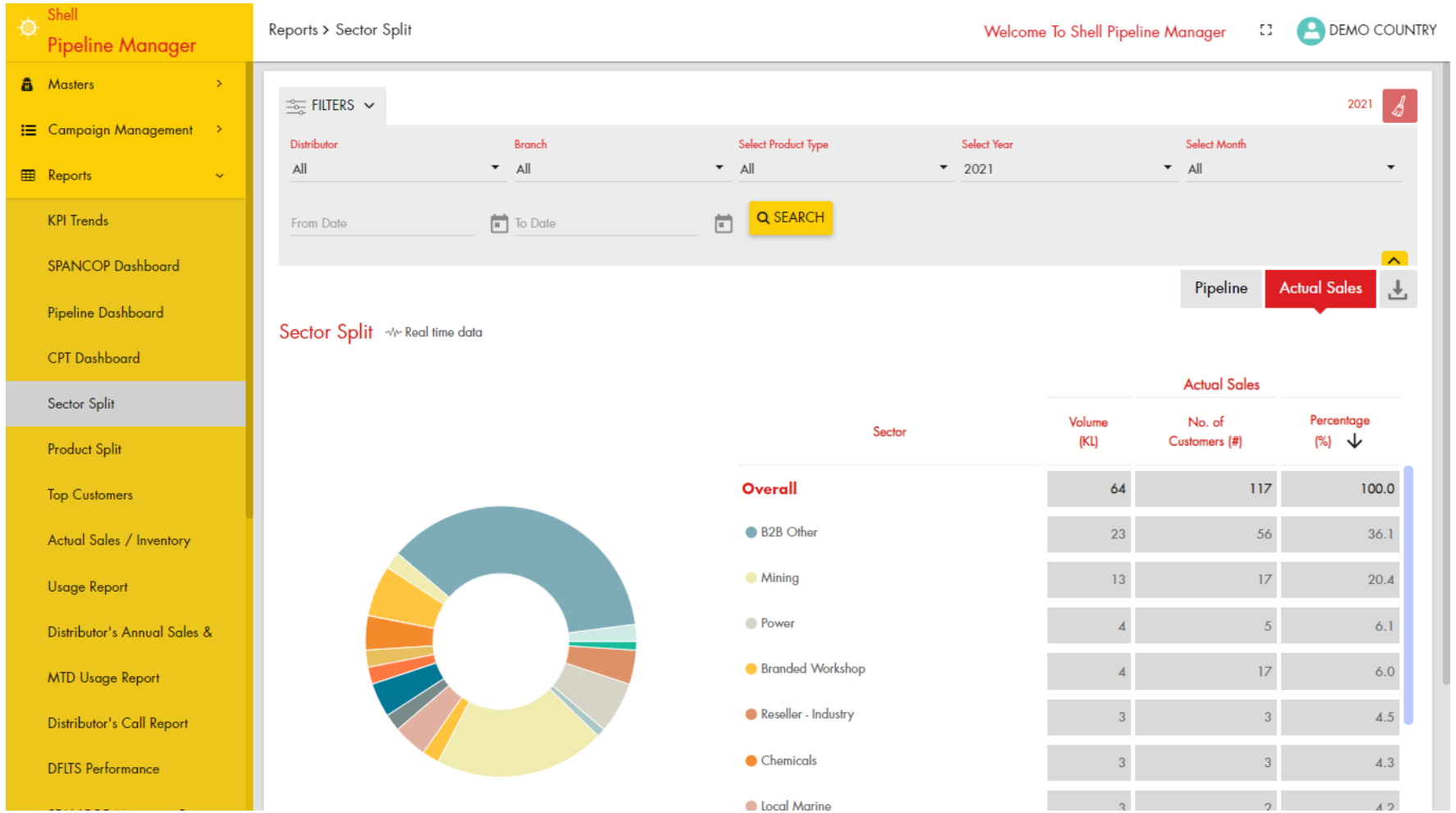
Reports : Sector Split - Actual Sales



Notes:

- Sector Split based on Actual sales will be displayed here.
- Filter the Product Type as Sustainability Products, to view the Sustainability sector report in Actual sales.

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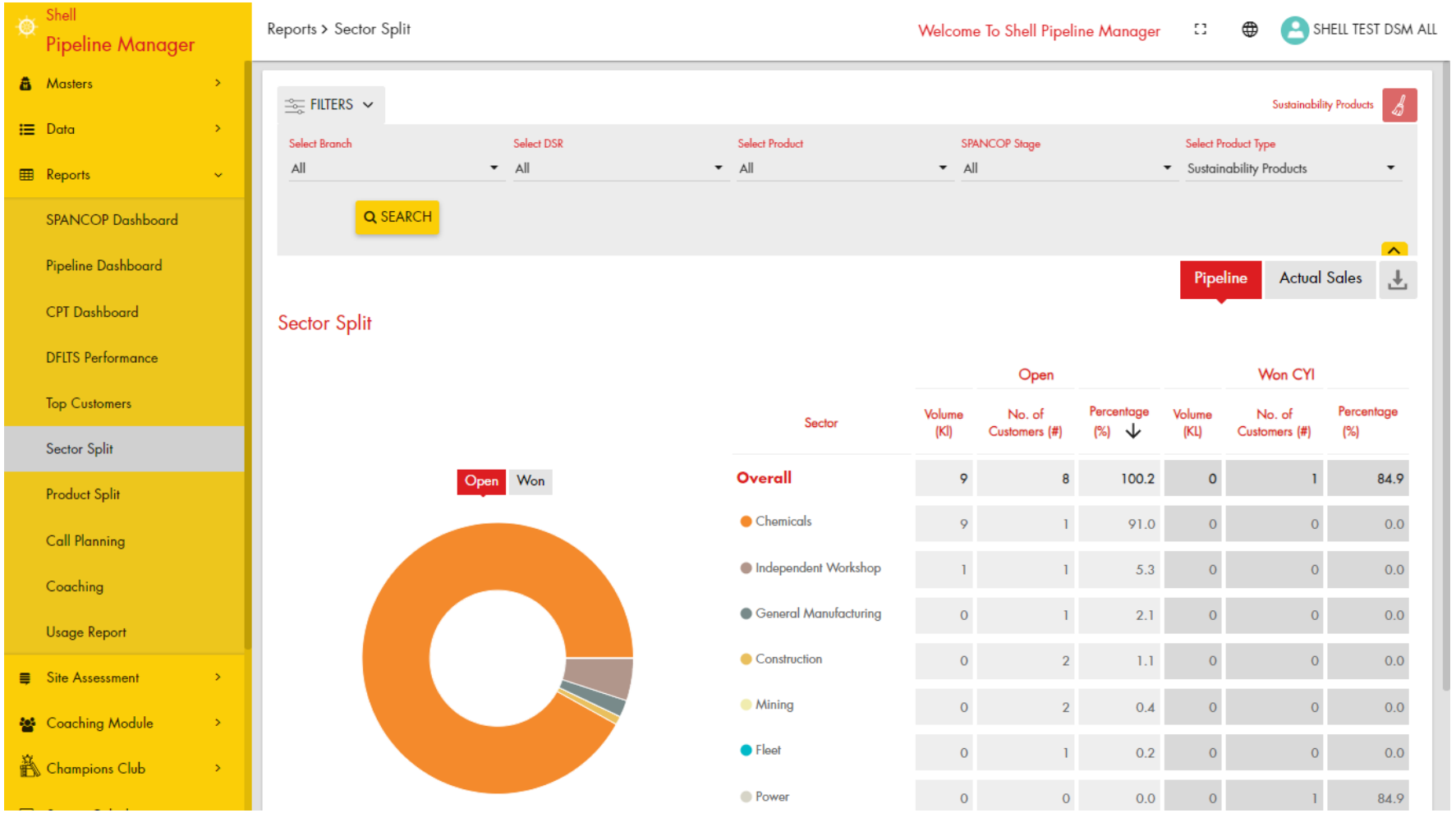
Reports : Sector Split – Sustainability Product



Notes:

- The Sustainability Products will be shown in Sector split.
- Filter the Product Type as Sustainability Products, to view the Sustainability sector report.

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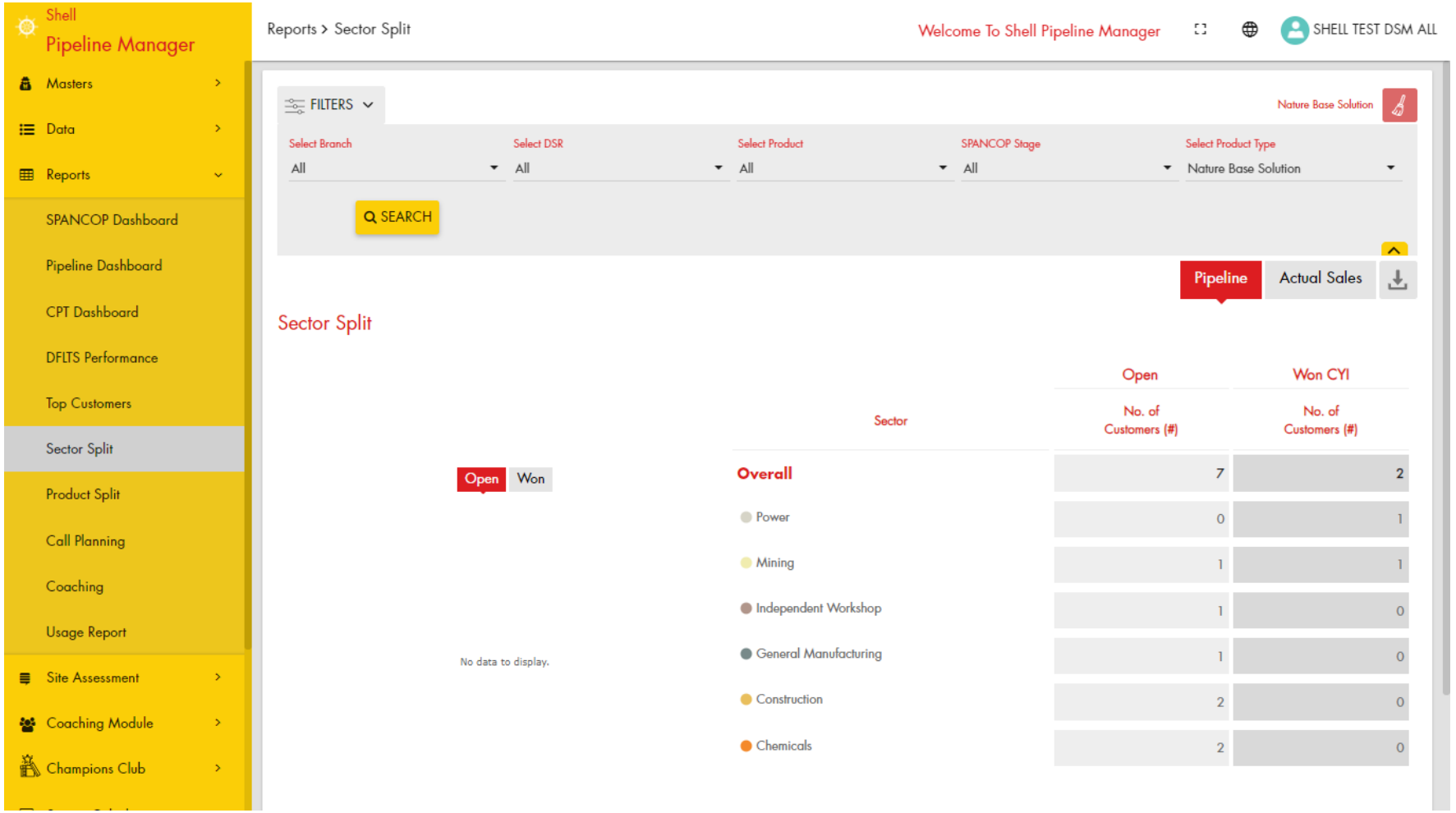
Reports : Sector Split - NBS



Notes:

- Filter the Nature Base Solution in both Pipeline and Actual sales to see the customer count of the sector in NBS.

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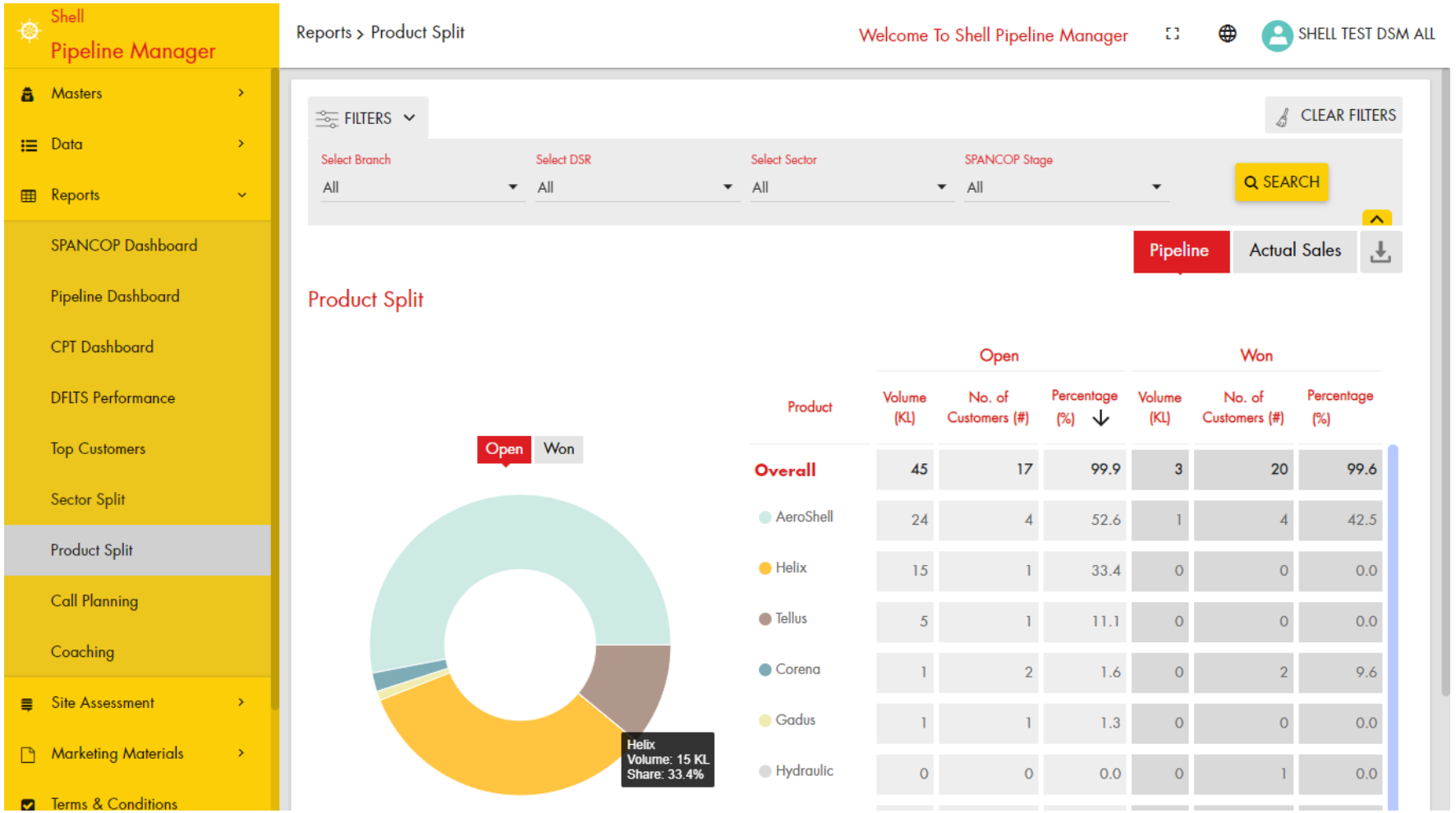
Reports : Product Split - Pipeline



Notes:

- Product Split contains reports containing information about the volume of each product.
- DSM can see the sector report through the Pie chart view.
- Users can see Product split for Pipeline and actual sales.
- DSM can also use filters to see the Branch, DSR, Sector, and SPANCOP level sector reports.
- Users can download sector split in Excel and PDF format by using the download symbol.

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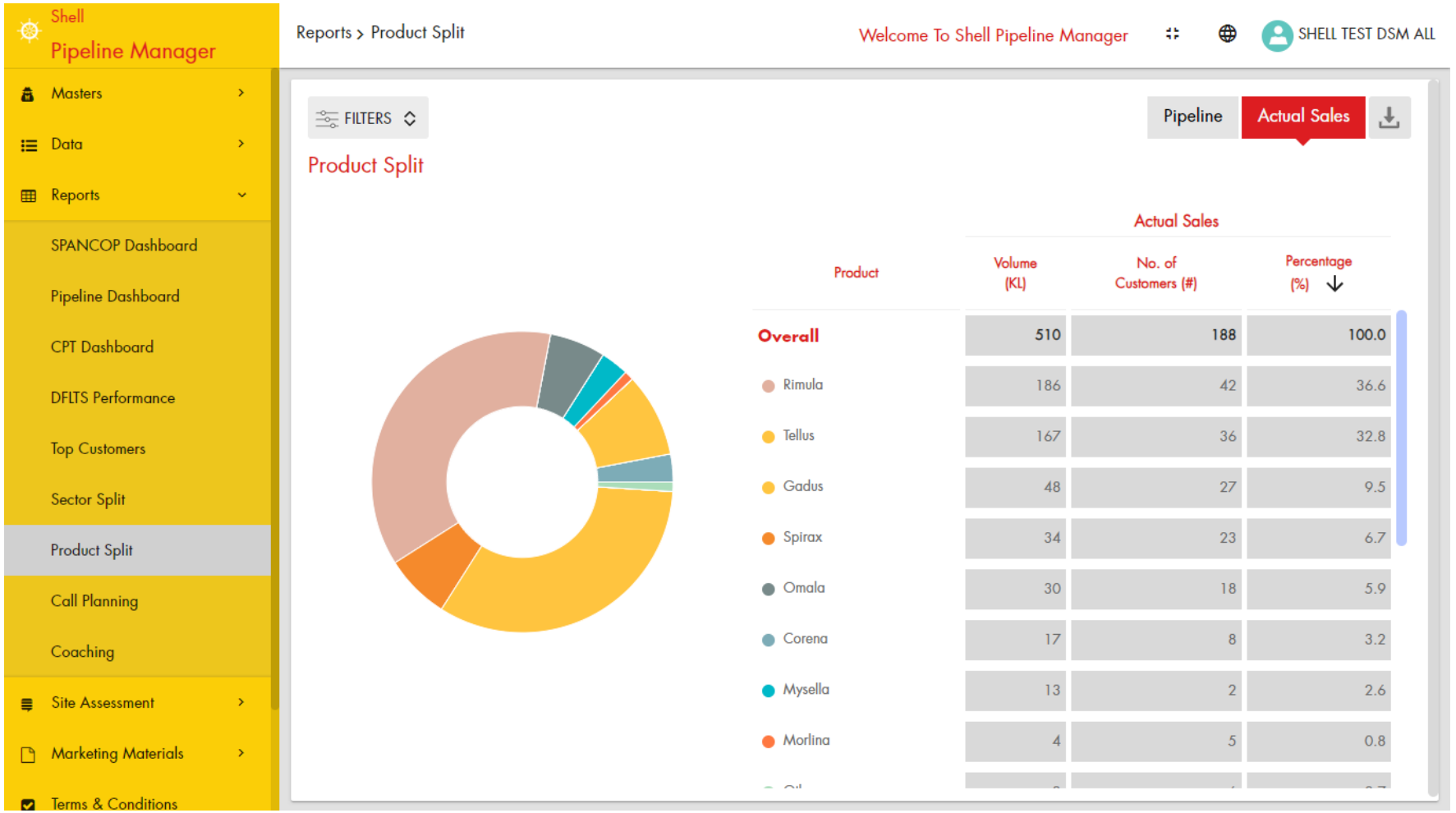
Reports : Product Split - Actual Sales



Notes:

- Product Split based on Actual Sales will be displayed here.

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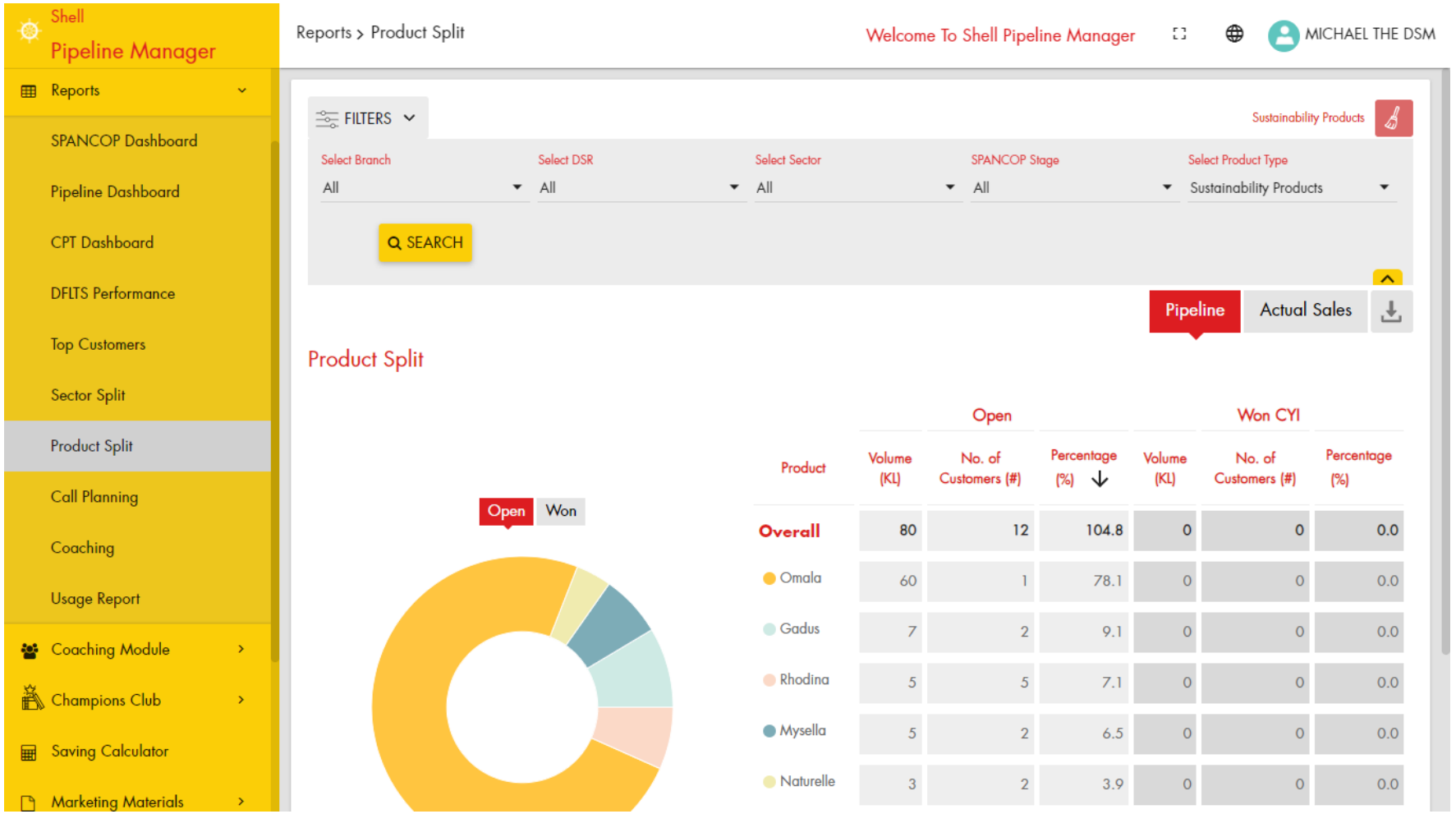
Reports : Product Split - Actual Sales



Notes:

- The Sustainability Products will be shown in the Product split.
- To view the sustainability product report, filter the product type as "Sustainability Products.
- It is displayed in both pipeline and Actual sales

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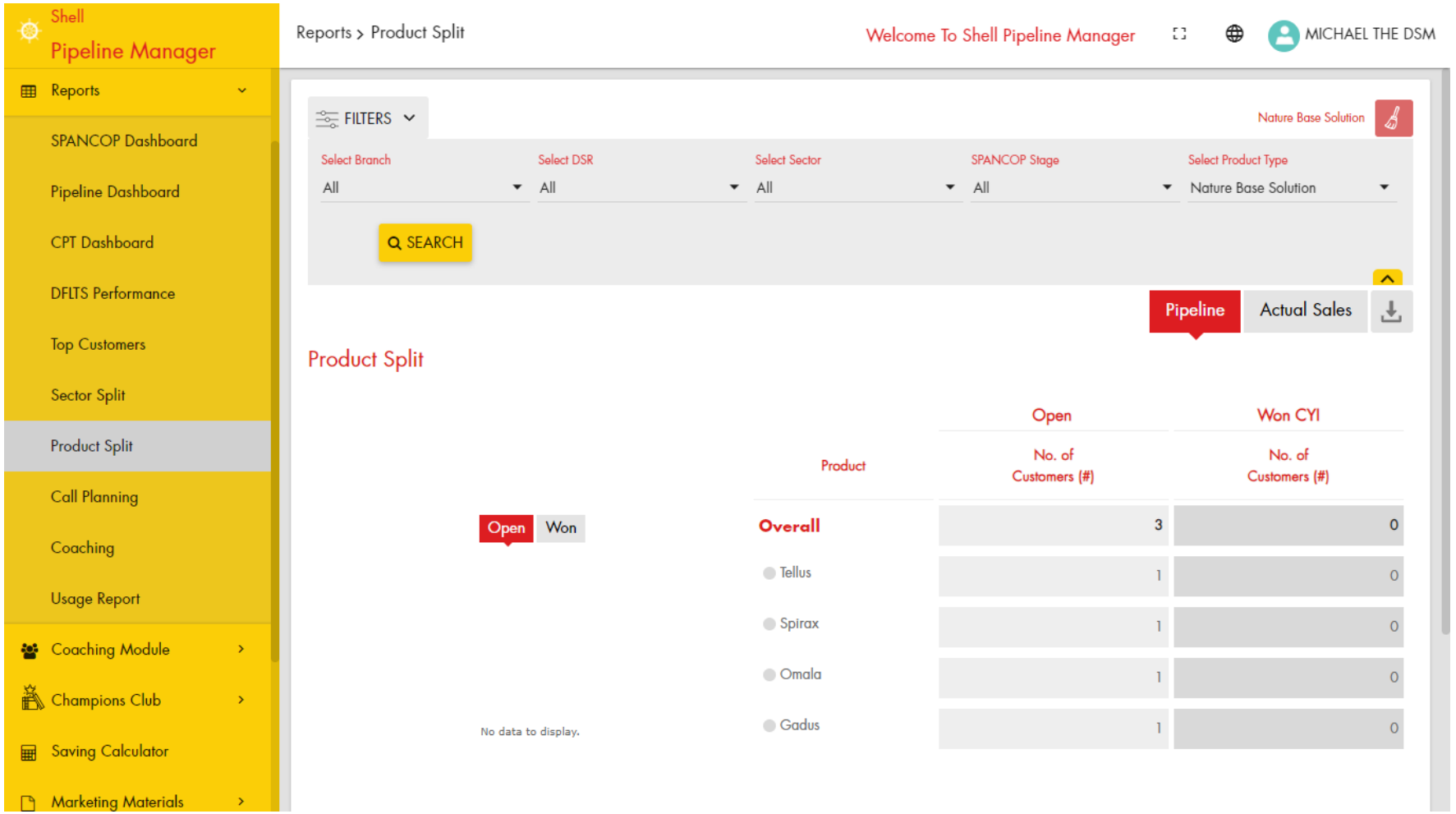
Reports : Product Split - Actual Sales



Notes:

- Filter as "Nature Base Solution" in both Pipeline and Actual sales to see the customer count of the Product in NBS.

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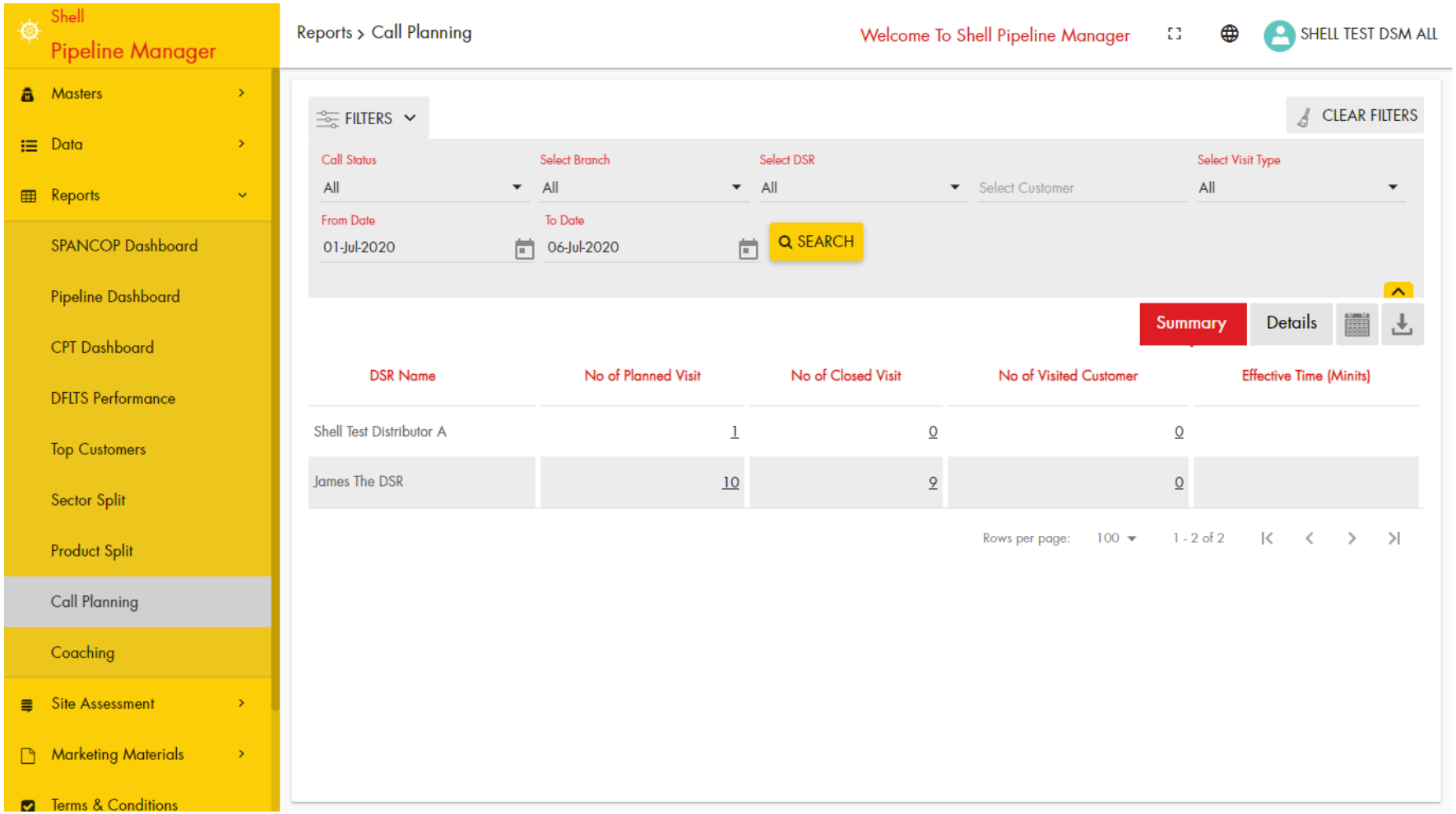
Reports : Call Planning - Summary



Notes:

- Call Planning summarises the visit reports of DSR.
- They include data like No. of Planned Visit(visits planned by DSR), No. of closed Visit(visits entered and closed by DSR), No. of . Visited Customer (Customer visited by DSR), Effective time(Average of time DSR spent with the customer during a visit).
- Click on Planned visit to view Planned calls.

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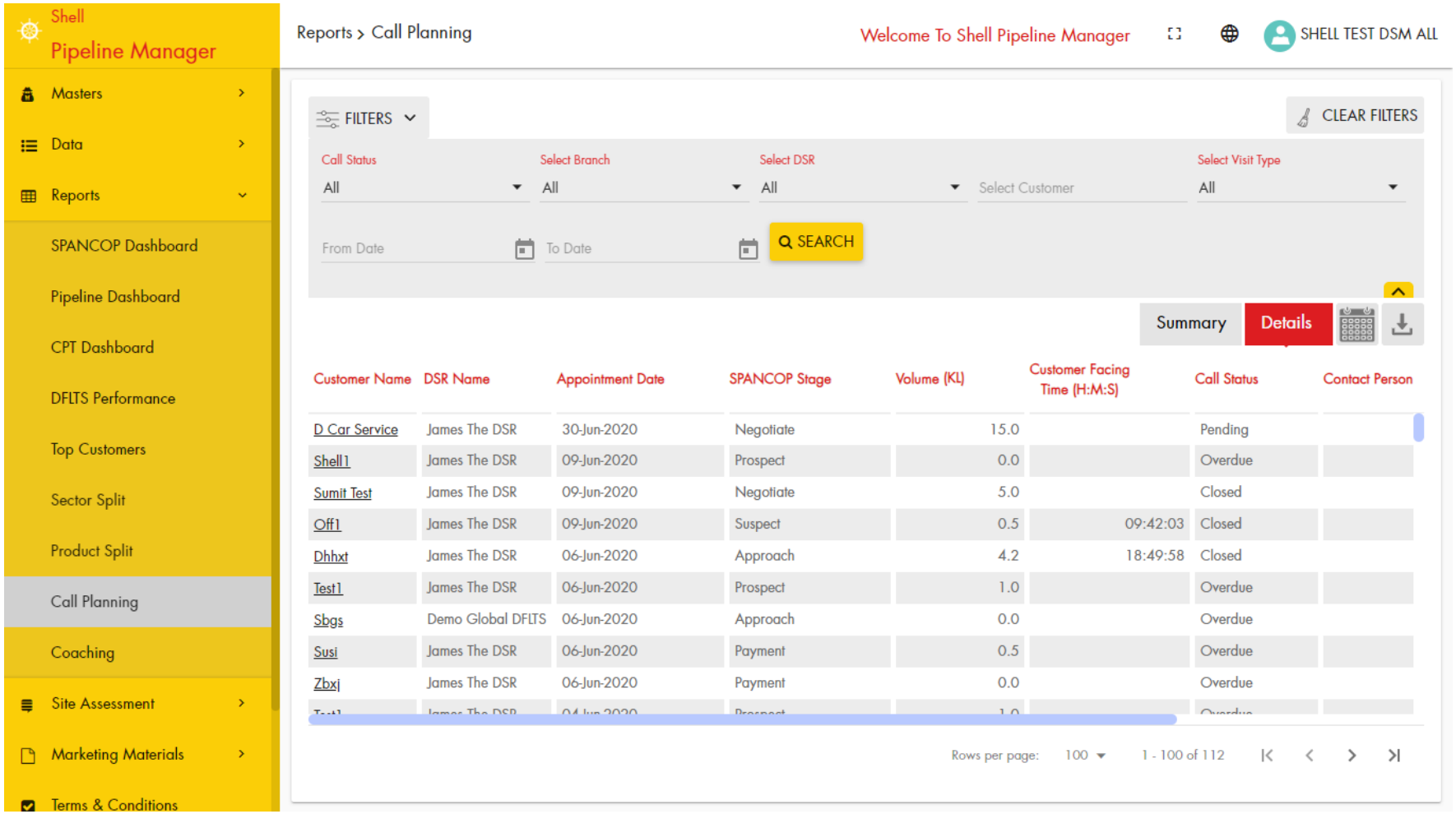
Reports : Call Planning - Details



Notes:

- DSM can view Call Planning reports here.
- DSM can use filters like from date, to date, branch, DSR name customer name, and visit type.
- Click on Customer's name to view the detailed screen of an Opportunity.
- DSM can download the reports in Excel and PDF format.

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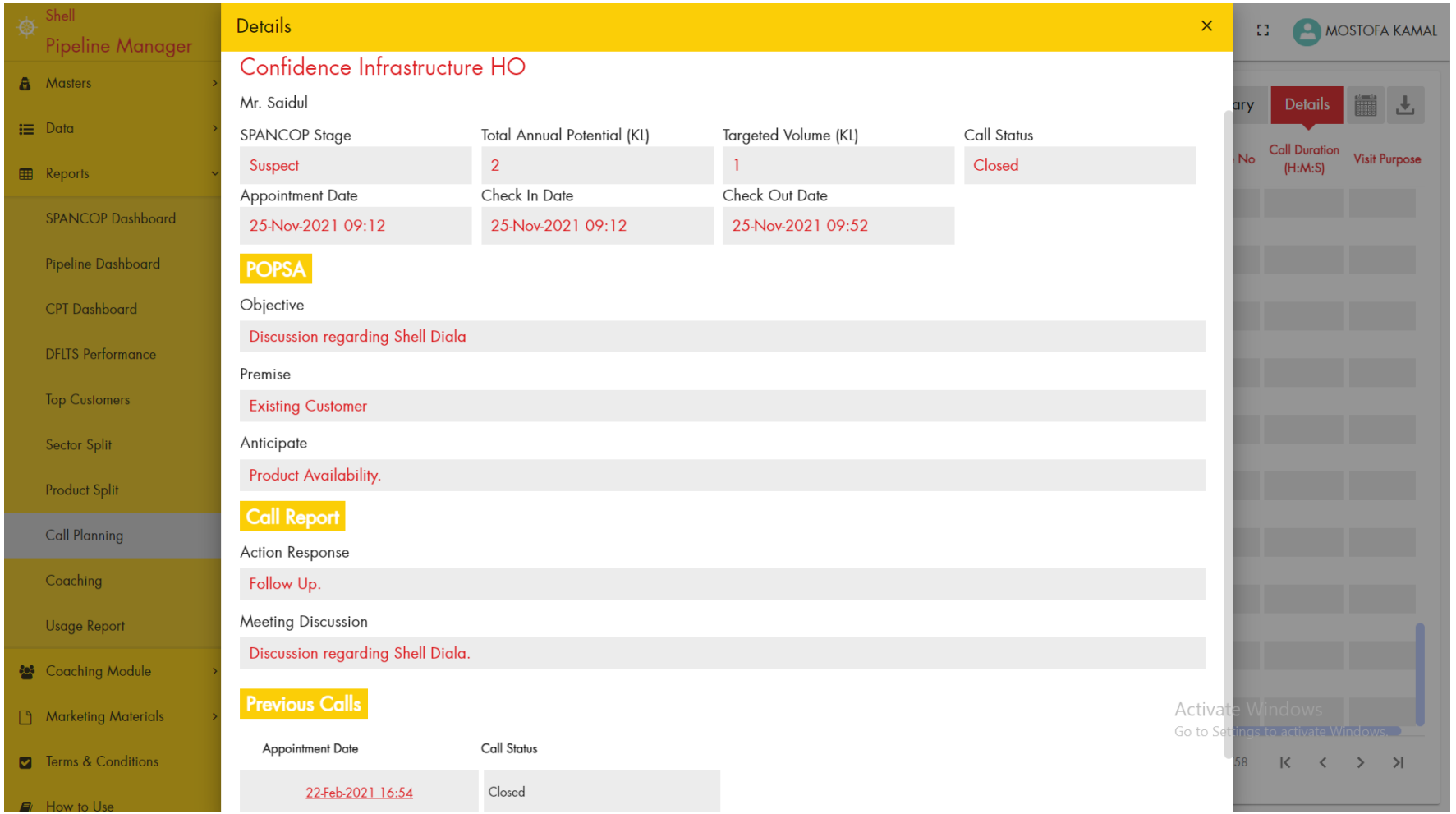
Reports : Call Planning - Details



Notes:

- Detailed Report screen for the selected opportunity.

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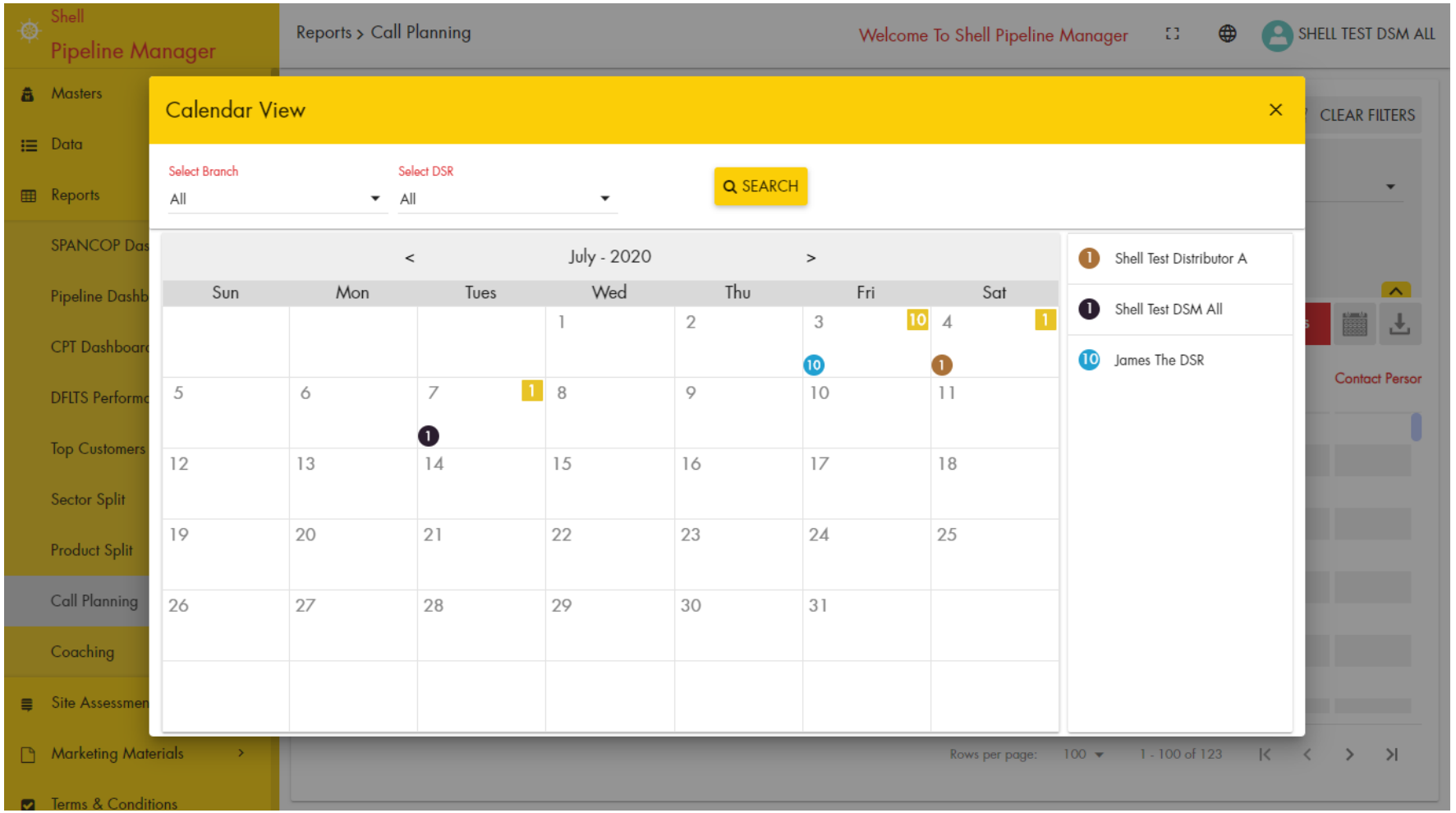
Reports : Call Planning - Calendar



Notes:

- The Calendar view contains call planning details for DSR and DFLTS .
- Each user is assigned a color code.
- If DSR creates a call plan, then the call plan will appear on that date with his respected colour in the calendar.
- Click on the coloured circle inside any date to see the detailed report.

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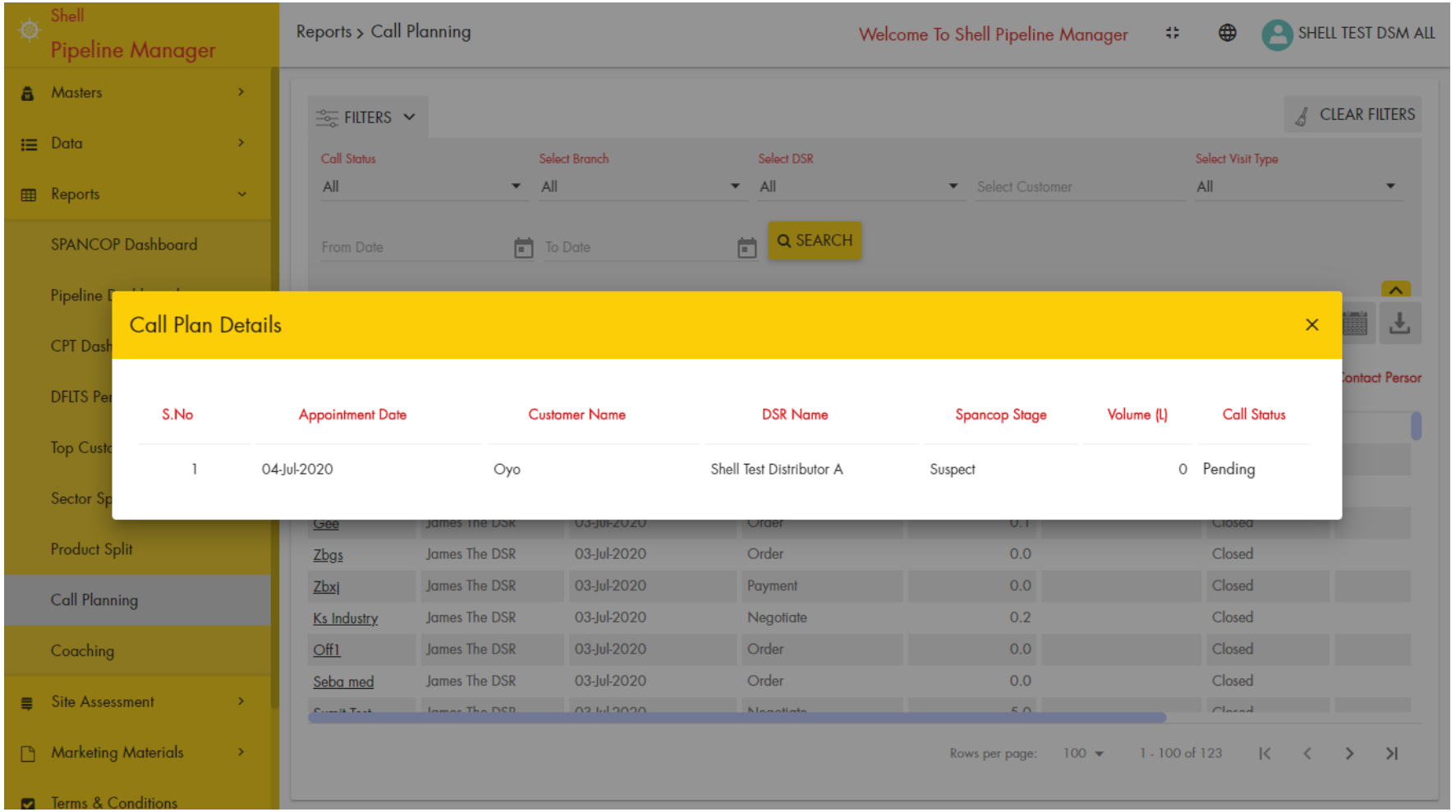
Reports : Call Planning



Notes:

- Detailed call plan report screen for the selected user.
- Click on the Call status of a call plan to see a detailed report.

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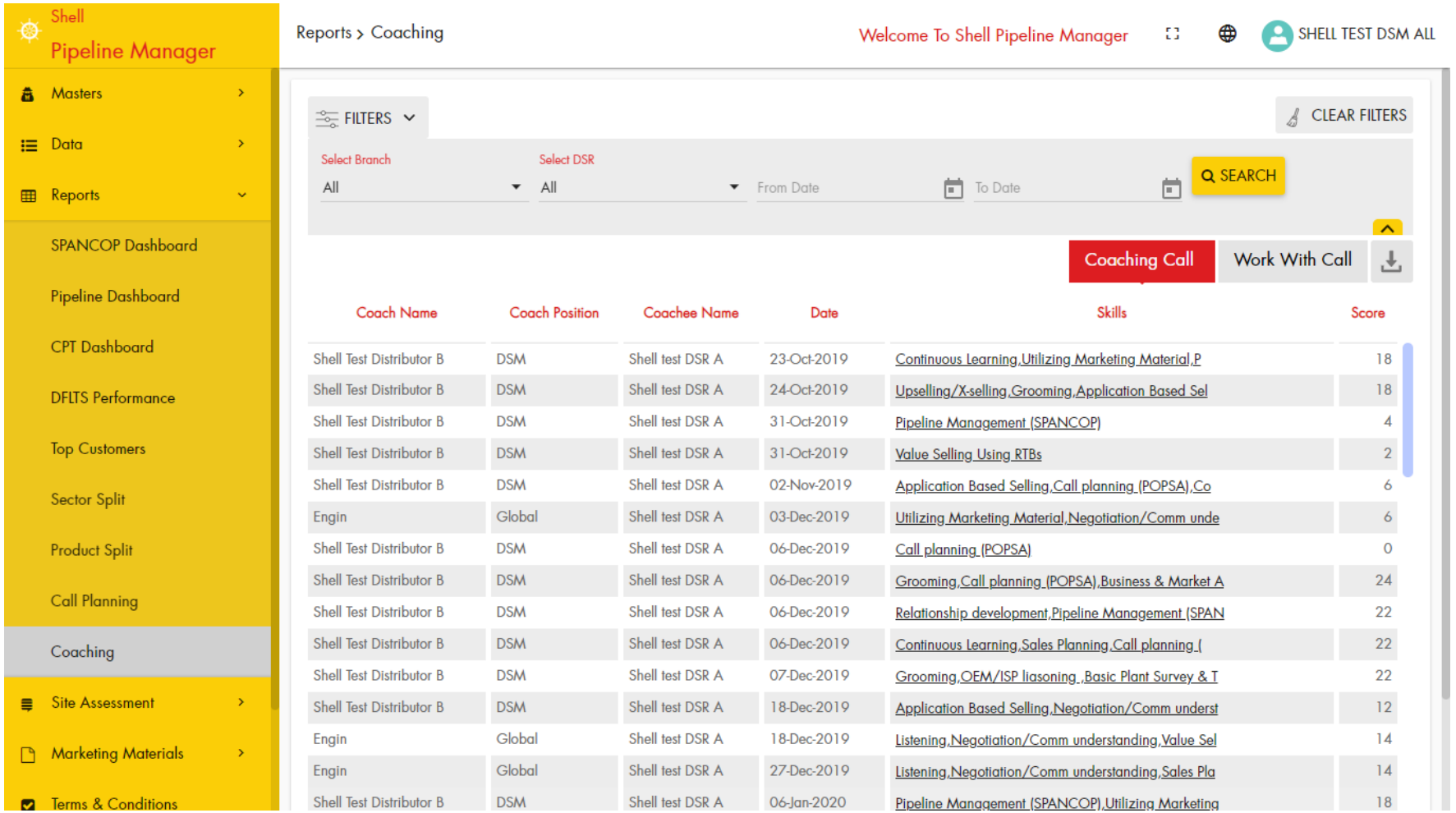
Reports : Coaching - Coaching Call



Coach Name	Coach Position	Coachee Name	Date	Skills	Score
Shell Test Distributor B	DSM	Shell test DSR A	23-Oct-2019	Continuous Learning,Utilizing Marketing Material,P	18
Shell Test Distributor B	DSM	Shell test DSR A	24-Oct-2019	Upselling/X-selling,Grooming,Application Based Sel	18
Shell Test Distributor B	DSM	Shell test DSR A	31-Oct-2019	Pipeline Management (SPANCOP)	4
Shell Test Distributor B	DSM	Shell test DSR A	31-Oct-2019	Value Selling Using RTBs	2
Shell Test Distributor B	DSM	Shell test DSR A	02-Nov-2019	Application Based Selling,Call planning (POPSA),Co	6
Engin	Global	Shell test DSR A	03-Dec-2019	Utilizing Marketing Material,Negotiation/Comm unde	6
Shell Test Distributor B	DSM	Shell test DSR A	06-Dec-2019	Call planning (POPSA)	0
Shell Test Distributor B	DSM	Shell test DSR A	06-Dec-2019	Grooming,Call planning (POPSA),Business & Market A	24
Shell Test Distributor B	DSM	Shell test DSR A	06-Dec-2019	Relationship development,Pipeline Management (SPAN	22
Shell Test Distributor B	DSM	Shell test DSR A	06-Dec-2019	Continuous Learning,Sales Planning,Call planning,(	22
Shell Test Distributor B	DSM	Shell test DSR A	07-Dec-2019	Grooming,OEM/ISP liasoning ,Basic Plant Survey & T	22
Shell Test Distributor B	DSM	Shell test DSR A	18-Dec-2019	Application Based Selling,Negotiation/Comm underst	12
Engin	Global	Shell test DSR A	18-Dec-2019	Listening,Negotiation/Comm understanding,Value Sel	14
Engin	Global	Shell test DSR A	27-Dec-2019	Listening,Negotiation/Comm understanding,Sales Pla	14
Shell Test Distributor B	DSM	Shell test DSR A	06-Jan-2020	Pipeline Management (SPANCOP),Utilizing Marketing	18

Notes:

- DSM can view the Coaching call report here.
- For the Coaching call to appear here, it needed to be added from the mobile using the Sales Channelmobile app by their DSR's / DSM.
- Users can use filters to view Branch, DSR and Date wise data.
- Click skills to view details of the Coaching call.
- Users can download the report in Excel and PDF format using download symbol.

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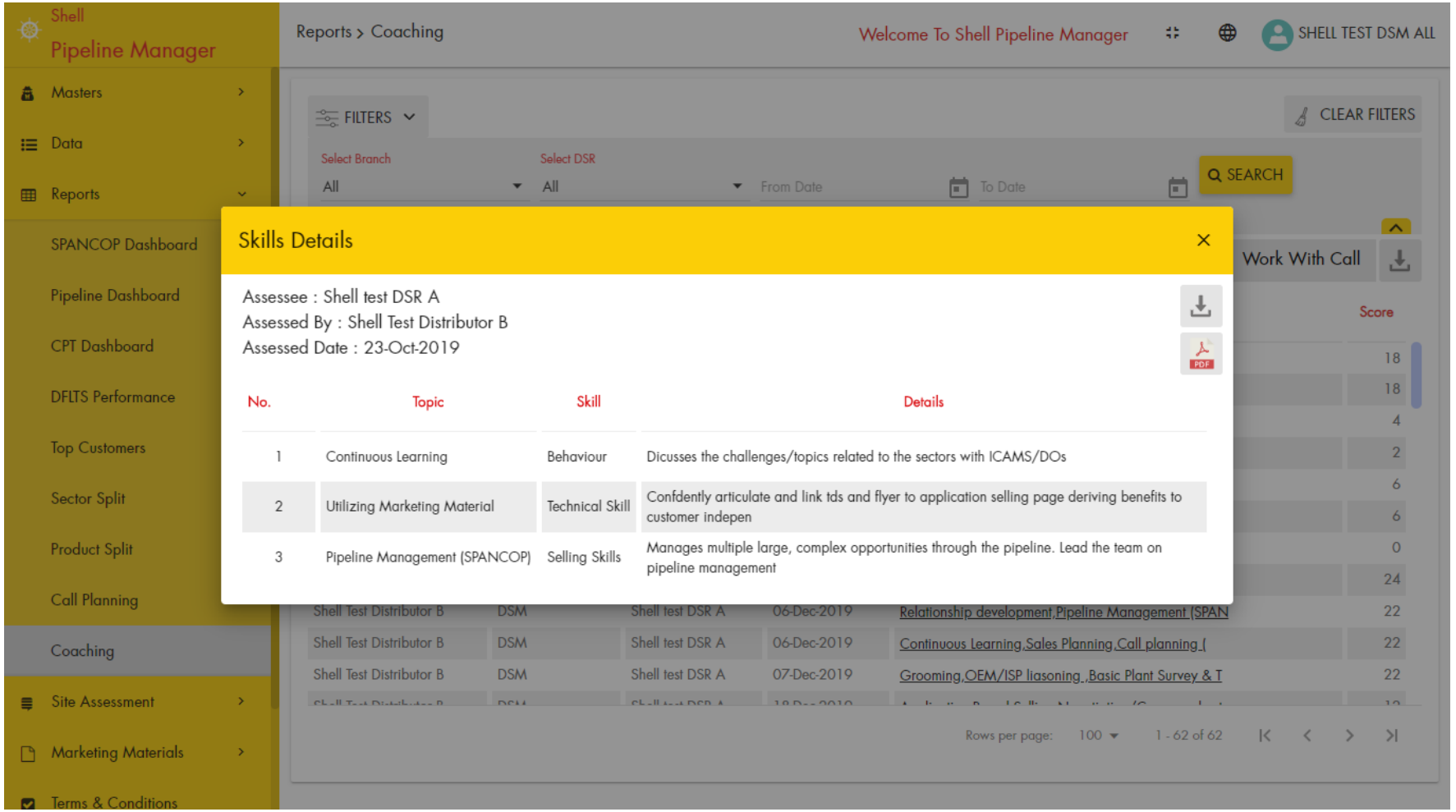
Reports : Coaching – Coaching Call



Notes:

- A Detailed report for selected skills.
- Users can download the details of the skill in PDF format.

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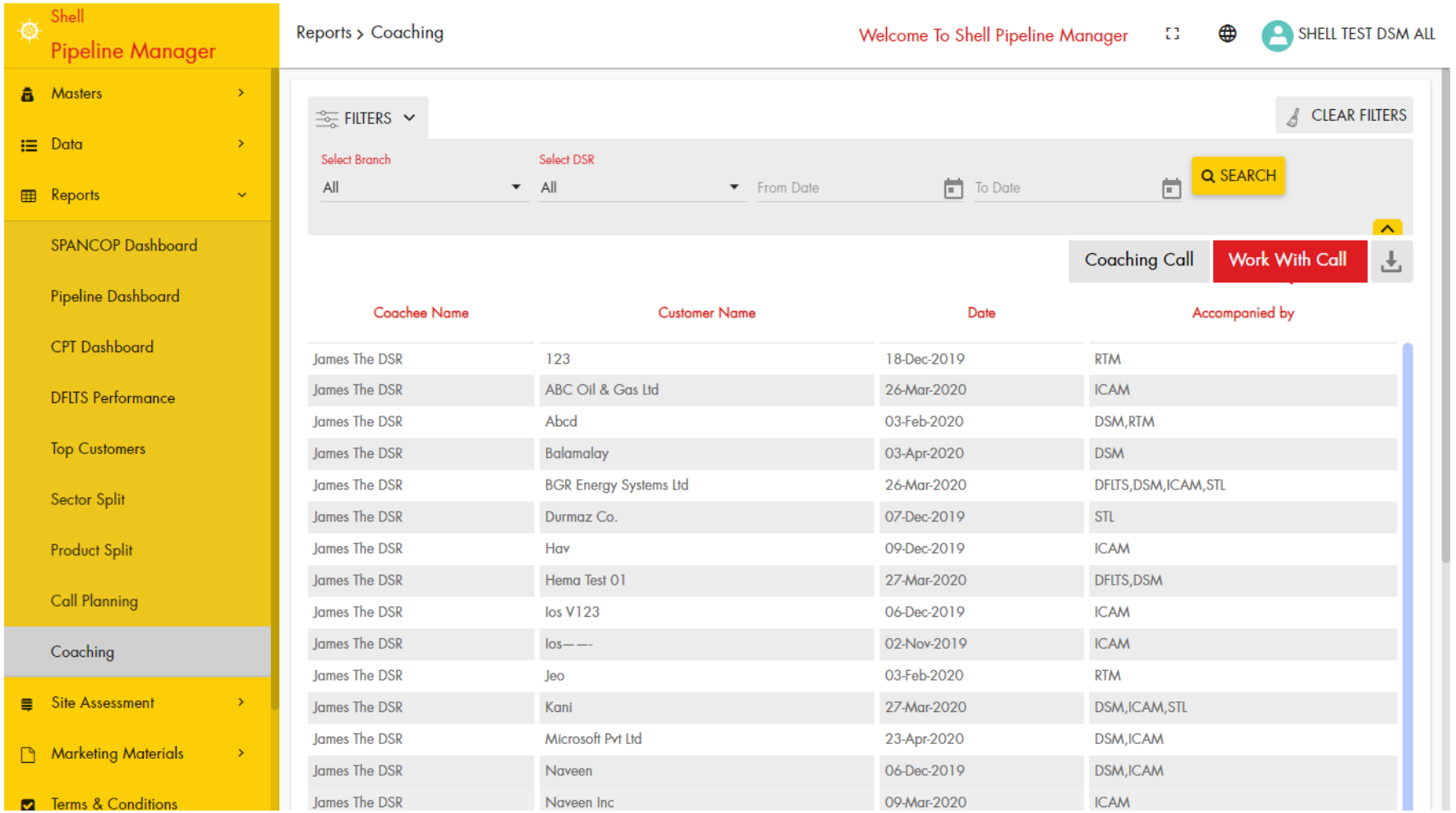
Reports : Coaching – Work With Call



Notes:

- DSM can view "Work with Call" reports here.
- A user can use a filter to view Branch, DSR, and Date wise data.
- User can download reports in Excel and PDF format using the download symbol.

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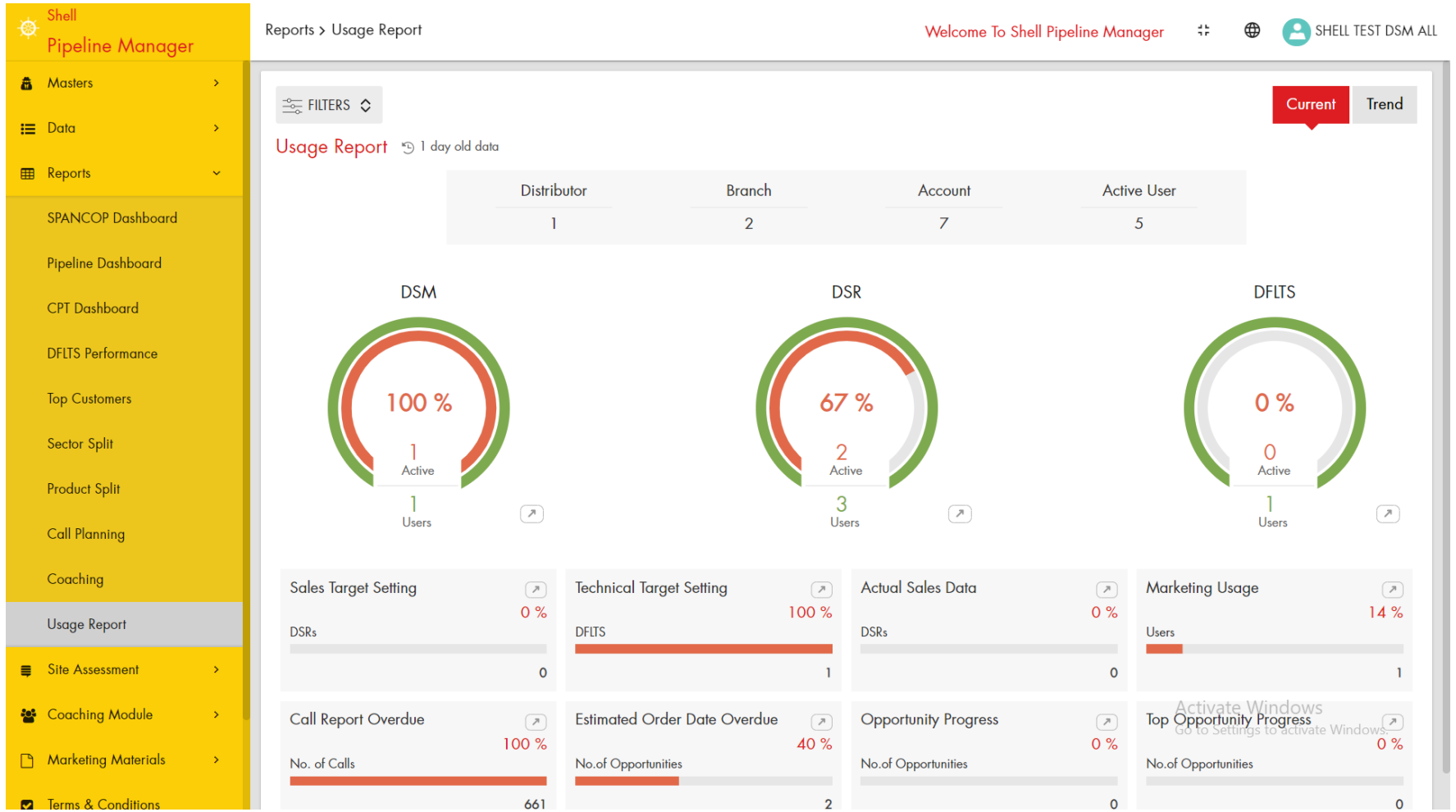
Masters : Usage Report - Current

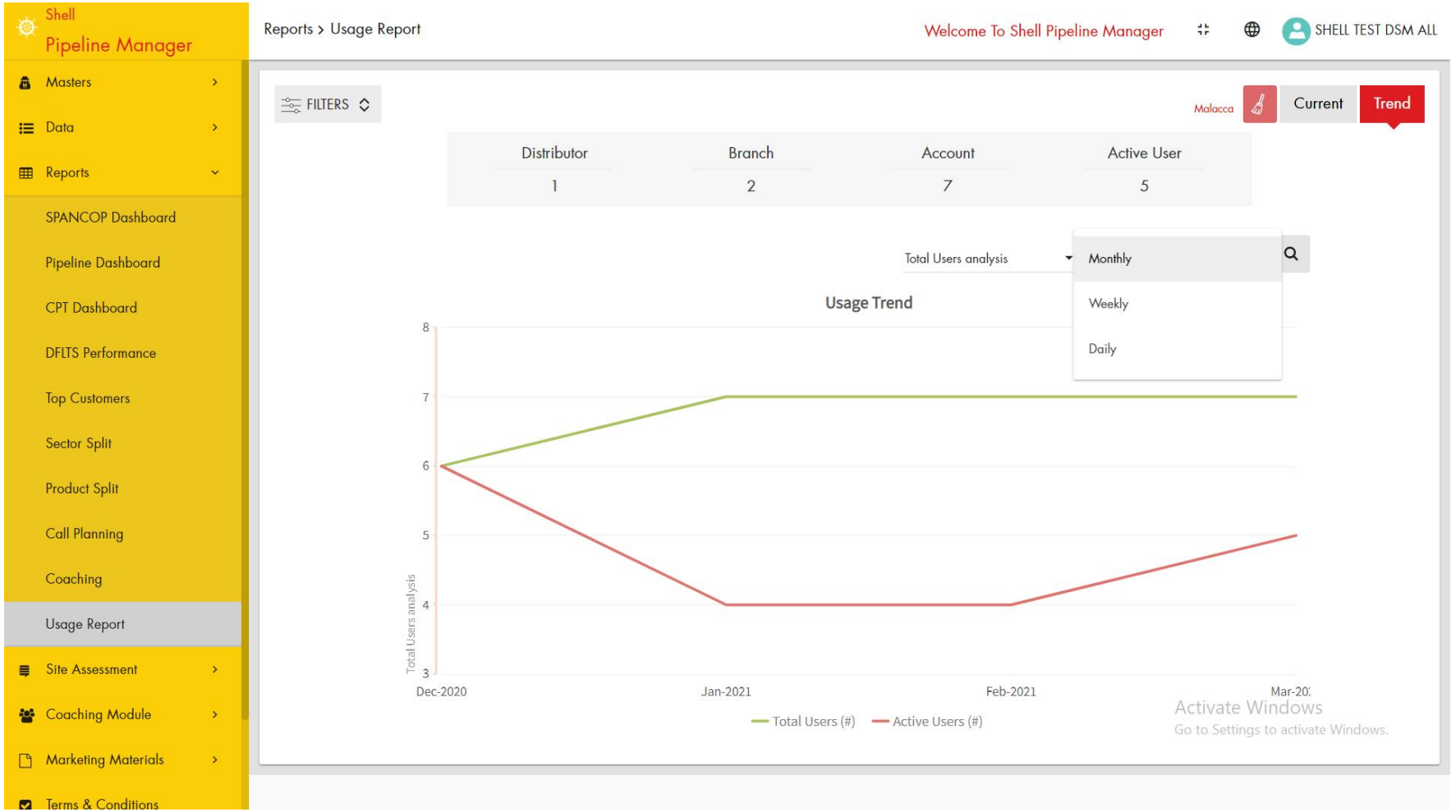


Notes:

- DSM can track the usage of the Sales ChannelTool by the DSM, DSR, DFLTS by Usage Report.
- The Usage Report provides details like last login date, Sales Target Setting, Technical Target Setting, Actual Sales Data, Marketing Usage, Call Report Overdue, Estimated order date overdue, Opportunity progress, and Top opportunity Progress.
- By clicking an arrow button the user can be able to see a detailed view of the menu.
- The YTD, MTD and WTD is available in the filter

Activate Windows
Go to Settings to activate Windows.

Reports : Usage Report - Trend



Notes:

- DSM can track the Sales ChannelTool usage by DSM, DSR, and DFLTS by Trend.
- DSM can view User's details on a monthly, weekly, and daily basis.

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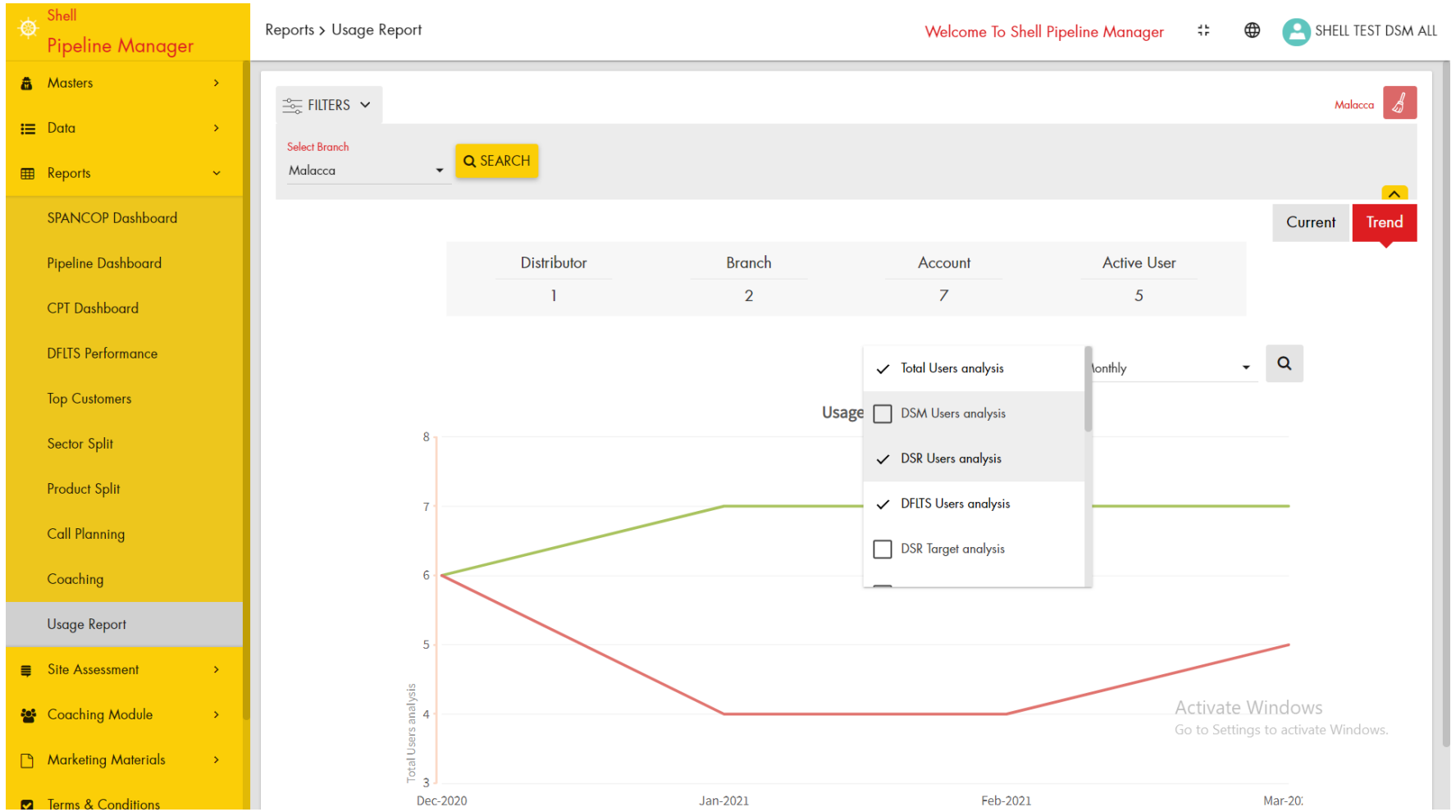
Reports: Usage Report - Trend



Notes:

- DSM can be able to filter out various user analyses by clicking on the Total Users analysis.

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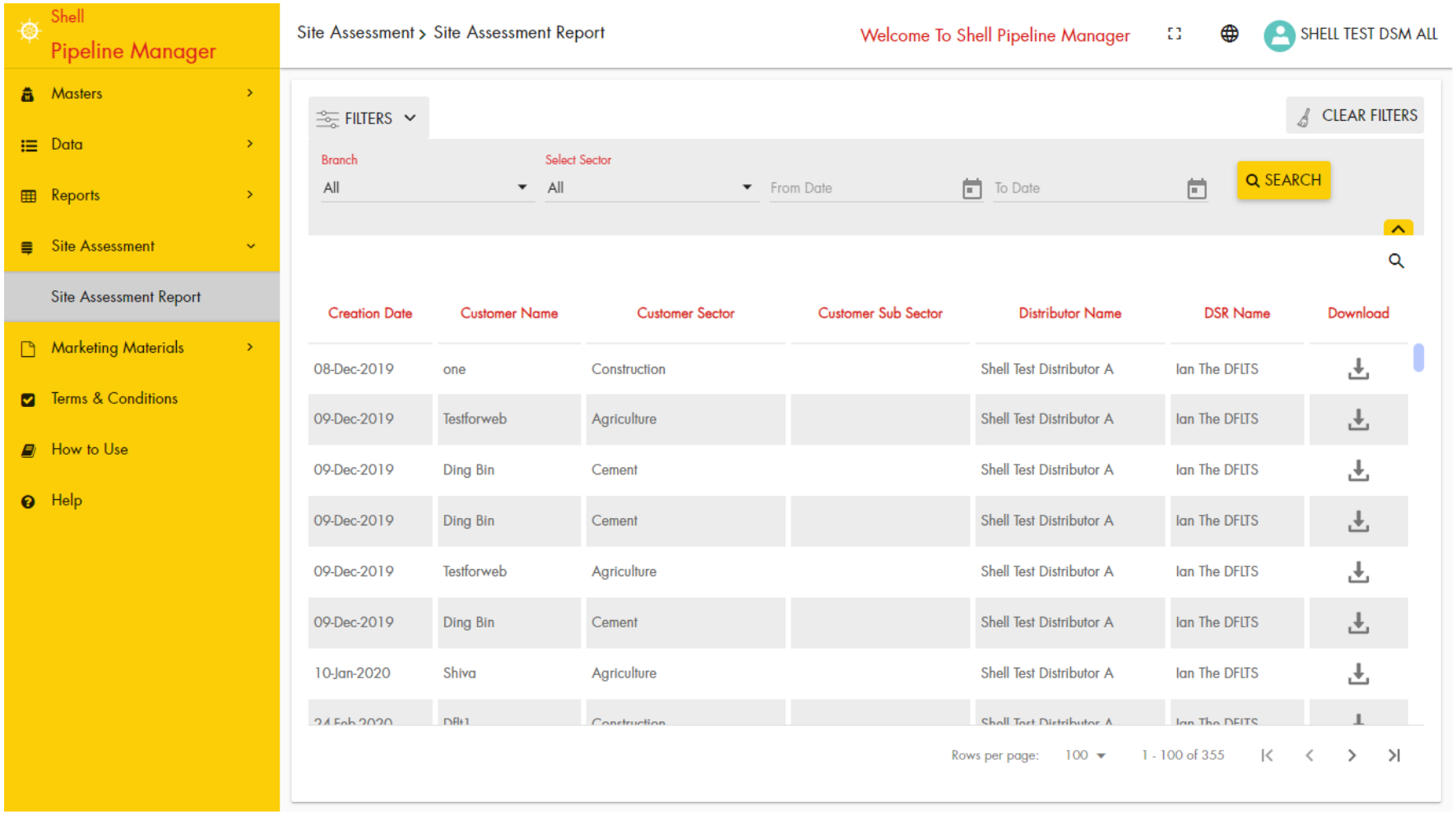
Site Assessment - Site Assessment Report



Notes:

- DSM can view the site assessment report here.
- The Site Assessment report contains details of the Creation date, Customer Name, Customer Sector, Distributor Name, DSR Name, and Download.
- Users can use filters to view Distributor, Branch, and Sector-wise Site Assessment report.
- The Site Assessment Report also includes a date filter.
- Users can download the Site Assessment Report in PDF.

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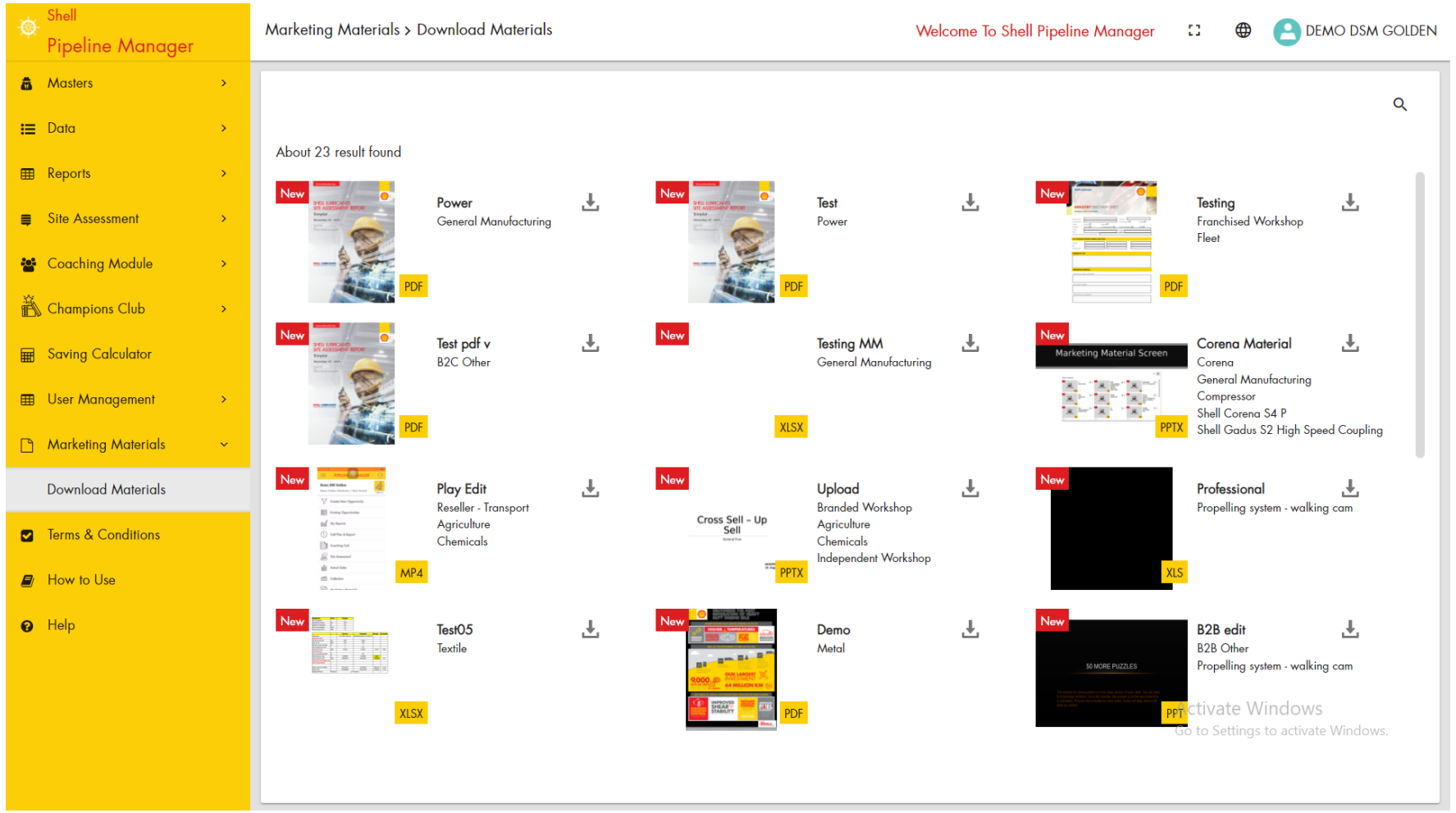
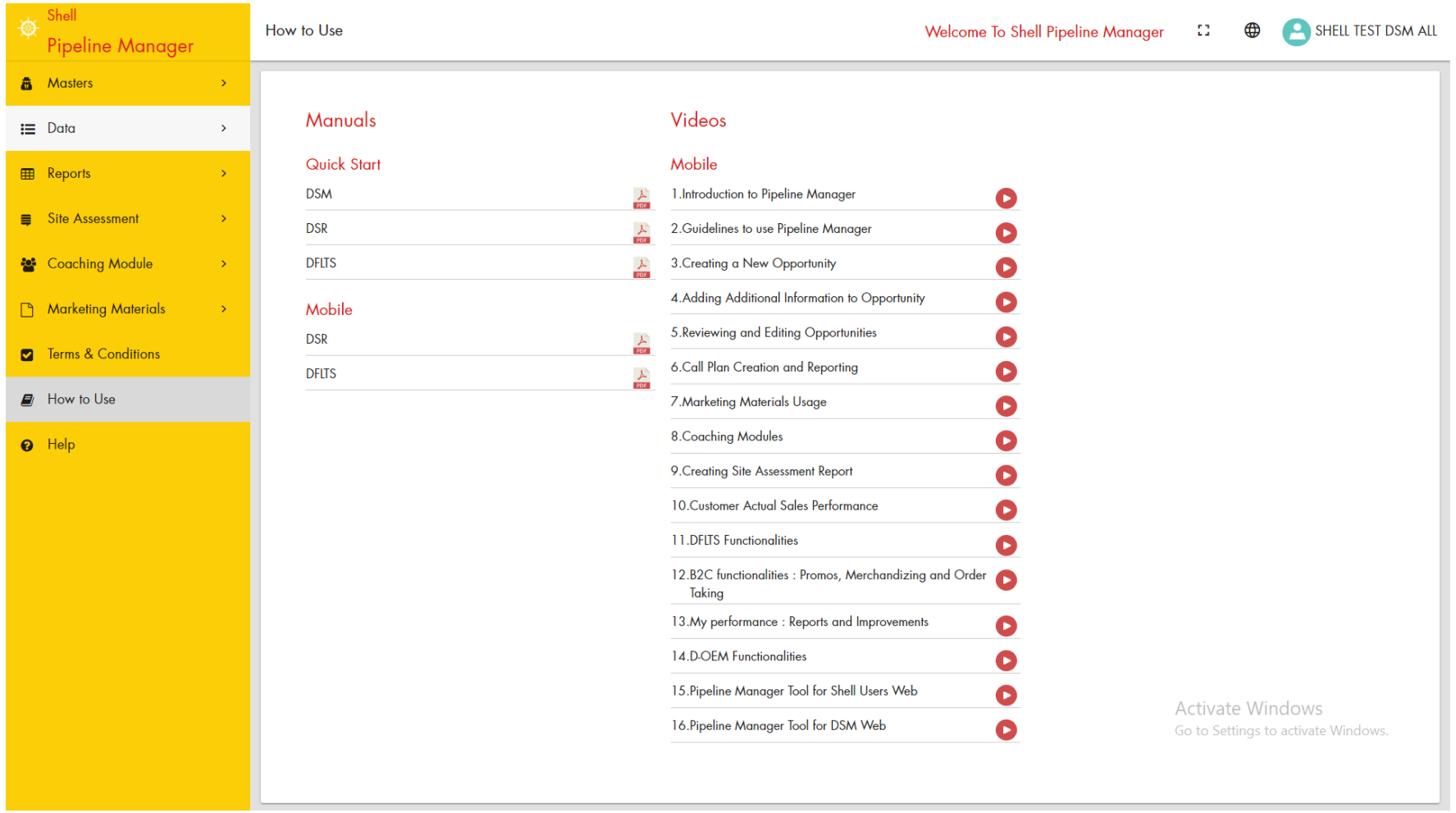
Marketing Materials : Download Materials



Notes:

- The uploaded material will be listed here.
- User can search based on the sector, product and application.
- DSM can download the documents based on their preference.
- Only.pdf,.ppt,.docx,.mpeg,.mpg ,.xls,.xlsx, and MP4 files are supported.

How to Use



Notes:

- "How to Use" contains details like manuals of Sales Channelfor both the Web and Mobile app in PDF and Videos.
- Users can get a Quick start for the Web and Mobile in PDF format.

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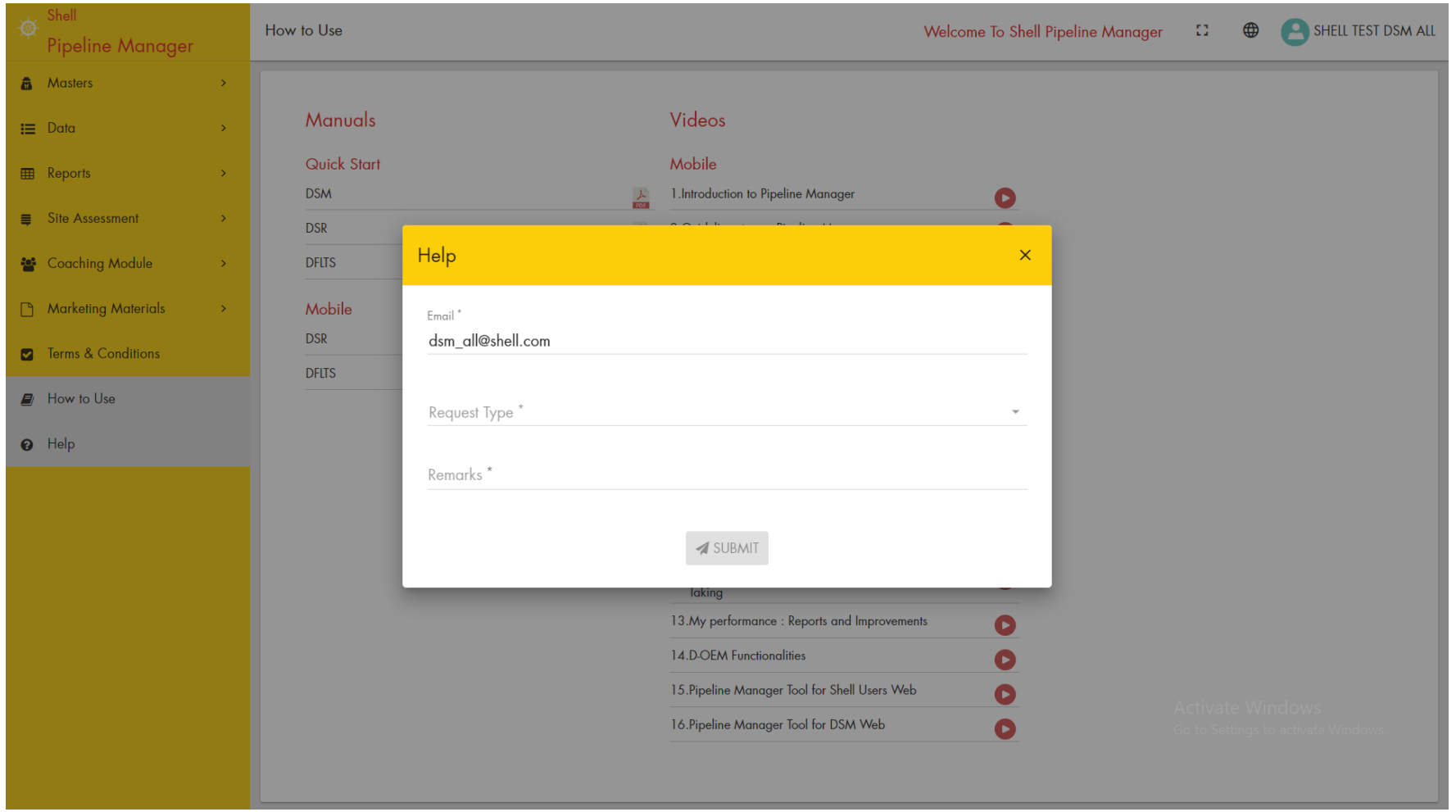
Help



Notes:

- A "Help" pop-up will open once the user clicks on the help menu.
- The user's email ID will be auto-filled.
- A user can choose between a variety of request types like Data, login, Training, Change Requests.
- After filling out the mandatory fields and clicking submit, a ticket will be added to the system and the user will receive an auto-generated email.

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