



# Sales Channel– DSM Quick Start

Version 5.1

**Amshuhu iTech Solution Pvt. Ltd**  
Vendor

# 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.

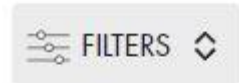
- Click to Add New



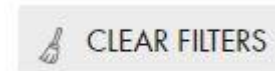
- Click to Edit



- 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.

# 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



# Dashboard

iSteer Sales Channel

Welcome To iSteer Sales Channel

SHELL TEST DSM ALL

1 day old data

Select Branch: All | Select DSR: All | LoB: All | Tier: All | SEARCH

Annual Target	0 KL	PY Annual Actual	0 KL	Incremental Target	0 KL	Incremental Target Delivered	0%	Gap to Target YTD	0 KL
	0 #		0 #		0 #				

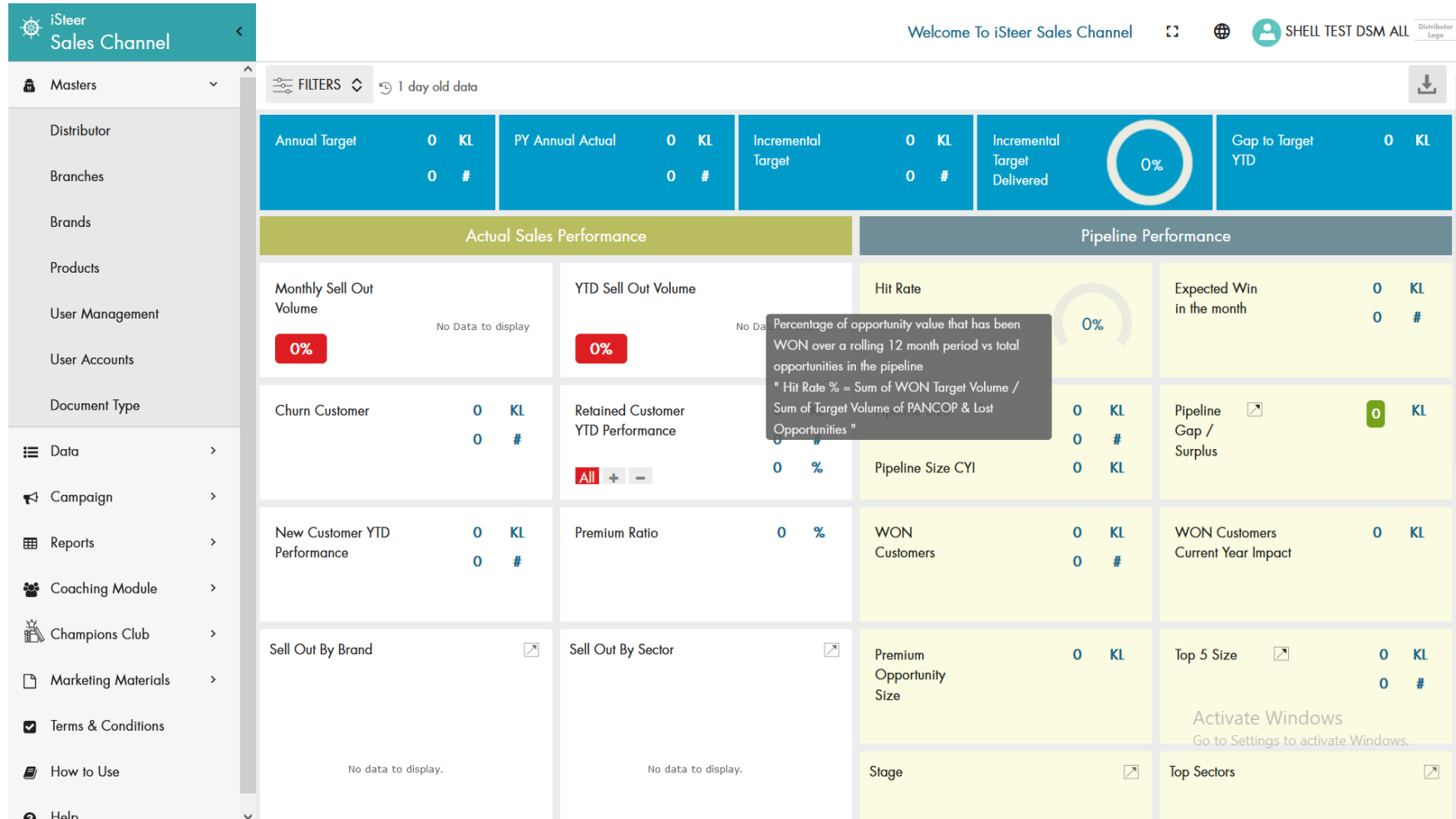
Actual Sales Performance				Pipeline Performance			
Monthly Sell Out Volume	No Data to display			YTD Sell Out Volume	No Data to display		
	0%				0%		
Churn Customer	0 KL	0 #		Retained Customer YTD Performance	0 KL	0 #	
					0 %		
New Customer YTD Performance	0 KL	0 #		Premium Ratio	0 %		
Sell Out By Brand				Sell Out By Sector			
				Premium Opportunity Size	0 KL		
				WON Customers	0 KL	0 #	
				WON Customers Current Year Impact	0 KL		
				Top 5 Size	0 KL	0 #	

Activate Windows  
Go to Settings to activate Windows.

## 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.

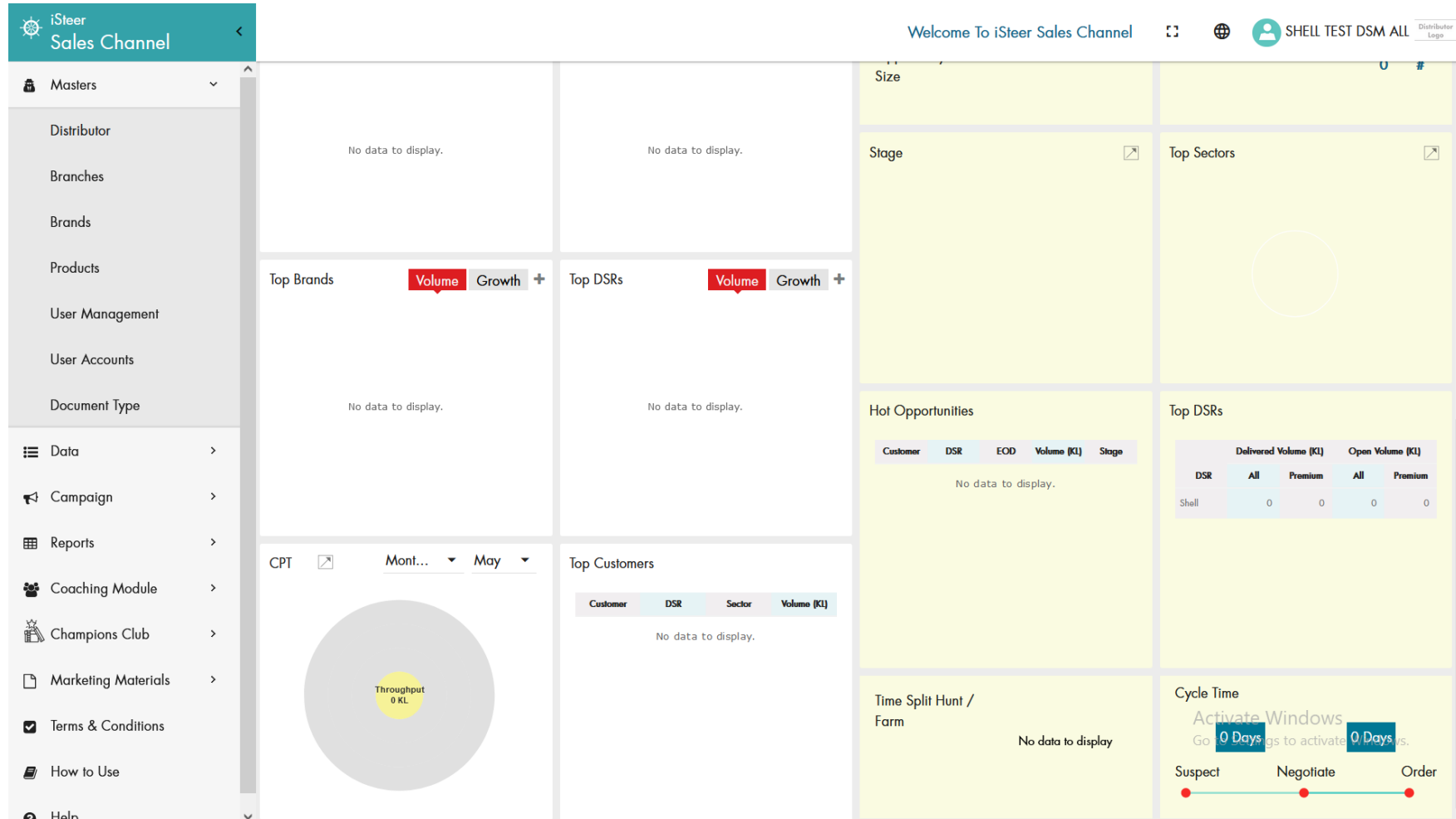
# Dashboard



**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.

# Dashboard

iSteer Sales Channel

Welcome To iSteer Sales Channel

DEMO DSM

Masters

FILTERS 1 day old data

Distributor	Annual Target	0 KL	PY Annual Actual	0 KL	Incremental Target	0 KL	Incremental Target Delivered	%	Gap to Target YTD	0 KL	
Branches	0 #		0 #		0 #						
User Management	Actual Sales Performance					Pipeline Performance					
User Accounts	Monthly Sell Out Volume		YTD Sell Out Volume			Hit Rate		Expected Win in the month			
Document Type	0		0			%		0 KL			
SKU List	0		0					0 #			
Data	Churn Customer		Retained Customer YTD Performance		Pipeline Size		Pipeline Gap / Surplus		0 KL		
Campaign	0 KL		0 KL		0 KL		0 #		0 KL		
Reports	0 #		0 #		0 #		0 #		0 #		
Marketing Materials	New Customer YTD Performance		Premium Ratio		WON Customers		WON Customers Current Year Impact		0 KL		
Terms & Conditions	0 KL		0 %		0 KL		0 KL		0 KL		
How to Use	0 #				0 #		0 #		0 #		
Help	Sell Out By Brand		Sell Out By Sector		Premium Opportunity Size		Top 5 Size		0 KL		
	0		0		0 KL		0 #		0 #		
							Activate Windows		Go to Settings to activate Windows.		
					Stage		Top Sectors				

## 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.

# Dashboard

The dashboard displays the following information:

- Header:** iSteer Sales Channel, Welcome To iSteer Sales Channel, SHELL TEST DSM ALL (Distributor Logo)
- Filters:** Select Branch (Main Branch), Select DSR (All), LoB (All), Tier (All), SEARCH
- Summary Metrics:**
  - Annual Target: 0 KL, 0 #
  - PY Annual Actual: 0 KL, 0 #
  - Incremental Target: 0 KL, 0 #
  - Incremental Target Delivered: 0%
  - Gap to Target YTD: 0 KL
- Actual Sales Performance:**
  - Monthly Sell Out Volume: No Data to display, 0%
  - YTD Sell Out Volume: No Data to display, 0%
- Pipeline Performance:**
  - Hit Rate: 0%
  - Expected Win in the month: 0 KL, 0 #
  - Churn Customer: 0 KL, 0 #
  - Retained Customer YTD Performance: 0 KL, 0 #, 0 %
  - Pipeline Size: 0 KL, 0 #
  - Pipeline Size CYI: 0 KL
  - Pipeline Gap / Surplus: 0 KL
  - New Customer YTD Performance: 0 KL, 0 #
  - Premium Ratio: 0 %
  - WON Customers: 0 KL, 0 #
  - WON Customers Current Year Impact: 0 KL
  - Sell Out By Brand, Sell Out By Sector
  - Premium Opportunity Size: 0 KL
  - Top 5 Size: 0 KL, 0 #

## 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.



# Masters : Distributor

The screenshot shows the iSteer Sales Channel interface. The top navigation bar includes the iSteer logo, the text "Masters > Distributor", and a welcome message "Welcome To iSteer Sales Channel". The user profile is identified as "SHELL TEST DSM ALL". A left-hand navigation menu lists various modules, with "Distributor" currently selected. The main content area displays a table of distributor information.

Name ↑	GSAP Code	Phone	Contact Person	Email	Distributor Logo	Delete Logo	Edit
Demo Golden Distributor	SA0013	098765432		ronen@gelisteer.com	✓	👁	✎

At the bottom of the interface, there is a watermark for "Activate Windows" and a pagination control showing "100", "1 - 1 of 1", and navigation arrows.

## 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.

# Masters : Branches

The screenshot shows the 'Masters > Branches' page in the iSteer Sales Channel. The table lists the following branches:

Branch Name	Address	Phone	Branch DSM	Email	Edit	Status
George Town I	Park Avenue I	0987654321		branch_gt@getisteer.com		<input checked="" type="checkbox"/>
Joho	St. Thomas street	786543265432		Joho_bm@getisteer.com		<input checked="" type="checkbox"/>
Main Branch	Kulalumper	098765432		ronen@getisteer.com		<input checked="" type="checkbox"/>
Malacca	Church Road	98765432432		malcca_bm@getisteer.com		<input checked="" type="checkbox"/>
Sibu	Franklin road	09876543456		sibubm@getisteer.com		<input checked="" type="checkbox"/>

## 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.

# Masters : Branches

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# Masters : Branches

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- 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.

# Masters : User Management

Welcome To iSteer Sales Channel

SHELL TEST DSM ALL

Email	Name	Accessible Branches	User Profile	Additional Role	Roles	Status	Actions
ronen@getisteer.com	Shell Test Distributor A		DGM	DSR		<input type="checkbox"/>	
dsm_all@shell.com	Shell Test DSM All		DSM	DSR		<input type="checkbox"/>	
dsr_all@shell.com	Demo DSR Golden		DSR	DFITS		<input type="checkbox"/>	
testdft@getisteer.com	Demo DFITS Golden		DFITS			<input type="checkbox"/>	
doem_all@getisteer.com	Demo Golden DOEM	Main Branch	DOEM			<input type="checkbox"/>	
pm.am@amshuhu.com	Naveen	Main Branch	DSR			<input type="checkbox"/>	
rajesh@isteer.com	Rajesh	Joho	DSR			<input type="checkbox"/>	

Activate Windows  
Go to Settings to activate Windows.

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## 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.

# Masters : User Accounts

User Accounts	Overall Distributor	Main Branch	Malacca	George Town I	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.

# Masters : Document Type

The screenshot displays the 'Masters > Document Type' page in the iSteer Sales Channel. The interface includes a sidebar with navigation options like Distributor, Branches, Brands, Products, User Management, User Accounts, Document Type (selected), Data, Campaign, Reports, Coaching Module, Champions Club, Marketing Materials, Terms & Conditions, How to Use, and Help. The main content area shows a table with the following data:

Name	Remarks	Edit	Status
Commercial	Test		<input checked="" type="checkbox"/>
Document sozhing	Test		<input checked="" type="checkbox"/>
Other			<input checked="" type="checkbox"/>
Photo			<input checked="" type="checkbox"/>
Test.doc	Testing		<input type="checkbox"/>

At the bottom right of the interface, there is a watermark for 'Activate Windows' and a pagination control showing '100', '1 - 5 of 5', and navigation arrows.

## 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.

# Data : Annual Target Entry - Sales

iSteer Sales Channel < Data > Annual Target Entry Welcome To iSteer Sales Channel SHELL TEST DSM ALL

FILTERS Sales Technical CLEAR ALL

DSRs	Last Year Sales				This Year Target				Incremental Target			Estimated Universe		2021 Impact of 2020 WON Customer
	Volume (L)		No. of Customers	Estimated Churn Rate (%)	Volume (L)		No. of Customers	Volume (L)		No. of Customers	Volume (L)	No. of Customers	Volume (L)	
	Mainstream	Premium			Mainstream	Premium		Mainstream	Premium					
<b>B2B</b>														
Shell Test DSM	4,555,556.0	5,666,666.0	0	0	6,767,676.0	6,757,424.0	0	2,212,120.0	1,090,758.0	0	0.0	0	0.0	
MAAGTECHNIC AG	0.0	0.0	0	0	0.0	0.0	0	0.0	0.0	0	0.0	0	14,009.0	
<b>B2B TOTAL</b>	<b>4,555,556.0</b>	<b>5,666,666.0</b>	<b>0</b>	<b>0</b>	<b>6,767,676.0</b>	<b>6,757,424.0</b>	<b>0</b>	<b>2,212,120.0</b>	<b>1,090,758.0</b>	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>14,009.0</b>	
<b>B2C</b>														
MAAGTECHNIC AG	0.0	0.0	0	0	0.0	0.0	0	0.0	0.0	0	0.0	0	14,009.0	
<b>B2C TOTAL</b>	<b>0.0</b>	<b>0.0</b>	<b>0</b>	<b>0</b>	<b>0.0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>14,009.0</b>	
<b>DISTRIBUTOR TOTAL</b>	<b>4,555,556.0</b>	<b>5,666,666.0</b>	<b>0</b>	<b>0</b>	<b>6,767,676.0</b>	<b>6,757,424.0</b>	<b>0</b>	<b>2,212,120.0</b>	<b>1,090,758.0</b>	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>28,018.0</b>	

Activate Windows  
Go to Settings to activate Windows.

\* Monthly Target get updated based on any creation / update to annual volume. Monthly Target = Annual Target / 12.

## 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.



# Data : Annual Target Entry - Sales

iSteer Sales Channel < Data > Annual Target Entry Welcome To iSteer Sales Channel SHELL TEST DSM ALL

Filters: Sales Technical CLEAR ALL

DSRs	Last Year Sales				This Year Target			Incremental Target			Estimated Universe		2021 Impact of 2020 WON Customer
	Volume (L)		No. of Customers	Estimated Churn Rate (%)	Volume (L)		No. of Customers	Volume (L)		Volume (L)	No. of Customers	Volume (L)	
	Mainstream	Premium			Mainstream	Premium		Mainstream	Premium				
<b>B2B</b>													
Shell Test DSM	<u>4,555,556.0</u>				<u>6,767,676.0</u>	<u>6,757,424.0</u>	0	2,212,120.0	1,090,758.0	0	<u>0.0</u>	0	0.0
MAAGTECHNIC AG	<u>0.0</u>				<u>0.0</u>	<u>0.0</u>	0	0.0	0.0	0	<u>0.0</u>	0	14,009.0
<b>B2B TOTAL</b>	<u>4,555,556.0</u>				<u>6,767,676.0</u>	<u>6,757,424.0</u>	0	2,212,120.0	1,090,758.0	0	<u>0.0</u>	0	14,009.0
<b>B2C</b>													
MAAGTECHNIC AG	<u>0.0</u>	<u>0.0</u>	0	0	<u>0.0</u>	<u>0.0</u>	0	0.0	0.0	0	<u>0.0</u>	0	14,009.0
<b>B2C TOTAL</b>	<u>0.0</u>	<u>0.0</u>	0	0	<u>0.0</u>	<u>0.0</u>	0	0.0	0.0	0	<u>0.0</u>	0	14,009.0
<b>DISTRIBUTOR TOTAL</b>	<u>4,555,556.0</u>	<u>5,666,666.0</u>	0	0	<u>6,767,676.0</u>	<u>6,757,424.0</u>	0	2,212,120.0	1,090,758.0	0	<u>0.0</u>	0	28,018.0

Activate Windows  
Go to Settings to activate Windows.

\* Monthly Target get updated based on any creation / update to annual volume. Monthly Target = Annual Target / 12.

**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 can enter the volume and no. of customers.
- The 2020 impact will be auto-calculated based on the volume of 2019 won customers.

# Data : Annual Target Entry - Technical

The screenshot displays the iSteer Sales Channel interface. The top navigation bar includes the iSteer Sales Channel logo, a breadcrumb trail 'Data > Annual Target Entry', and a welcome message 'Welcome To iSteer Sales Channel'. The user profile 'SHELL TEST DSM ALL' is visible in the top right. A left-hand navigation menu lists various options, with 'Annual Target Entry' selected. The main content area features a table with columns for DFLTS Name, Number of Visit, Number of Customers, WON Total Volume (L), Premium Volume (L), Site Assessment, DVR Development, OEM Approval, and Coaching. The 'Total' row shows all values as 0. A 'Filters' dropdown is present above the table, and a 'Technical' tab is active. A footer note states: '\* Monthly Target get updated based on any creation / update to annual volume. Monthly Target = Annual Target / 12.'

DFLTS Name	Number of Visit	Number of Customers	WON Total Volume (L)	Premium Volume (L)	Site Assessment	DVR Development	OEM Approval	Coaching
<u>Total</u>	0	0	0.0	0.0	0	0	0	0

## 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.

# Data : Opportunity List/Download

iSteer Sales Channel < Data > Opportunity List/Download

Welcome To iSteer Sales Channel

SHELL TEST DSM ALL

FILTERS

Customer Opportunity +

<input type="checkbox"/>	Opportunity Name	DSR	Sector	Volume (L) / Premium (%)	Stage	Products / Services	Opportunity Type	Actions
<input type="checkbox"/>	<a href="#">New - A</a>	Demo DSR Golden	Power	10,000,000 0.0%	Approach	Heat Transfer	New Customer	
<input type="checkbox"/>	<a href="#">Naveen Test - Testing_1</a>	Demo DSR Golden	General Manufacturing	20,000 50.0%	Prospect	Hydraulic, Omala, Morlina	New Customer	
<input type="checkbox"/>	<a href="#">Isteer - 1</a>	Demo DSR Golden	Mining	10,000 0.0%	Approach	Corena, Tonna, Heat Transfer	New Customer	
<input type="checkbox"/>	<a href="#">Kumar - New</a>	Demo DSR Golden	General Manufacturing	6,000 0.0%	Suspect	Rimula	New Customer	
<input type="checkbox"/>	<a href="#">Vinoth - New</a>	Demo DSR Golden	Fleet	5,000 0.0%	Suspect	Corena	New Customer	
<input type="checkbox"/>	<a href="#">Duplicate Issues - R</a>	Demo DSR Golden	Agriculture	2,000 0.0%	Retention	Corena, Tonna	Cross Sell	
<input type="checkbox"/>	<a href="#">Volume Limit - Limit_1</a>	Demo DSR Golden	Metal	2,000 0.0%	Prospect	Rimula	Cross Sell	
<input type="checkbox"/>	<a href="#">Santhosh - Test5</a>	Demo DSR Golden	Construction	1,000 0.0%	Suspect	Hydraulic	New Customer	
<input type="checkbox"/>	<a href="#">Android2 - New</a>	Demo DSR Golden	General Manufacturing	1,000 0.0%	Suspect	Rimula	New Customer	

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## 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.

# Data : Opportunity List/Download

Filters:

- Select Branch: Main Branch
- Select DSR: All
- Select Customer: Select Customer
- Campaign Source: All
- Campaign Name: All
- Select Sector: All
- Customer Type: All
- Opportunity Type: All
- Opportunity Status: Active
- Stage: All
- Top 5 Customer: All
- DFLTS Support: All
- Premium Percentage: All
- Conversion From Date: Conversion From Date
- Conversion To Date: Conversion To Date
- Expected Order From Date: Expected Order From Date
- Expected Order To Date: Expected Order To Date
- Added From Date: Added From Date
- Added To Date: Added To Date
- Last Modified From Date: Last Modified From Date
- Last Modified To Date: Last Modified To Date

Opportunity Name	DSR	Sector	Volume (l) / Premium (%)	Stage	Products / Services	Opportunity Type	Actions
<a href="#">New - A</a>	Demo DSR Golden	Power	10,000,000 / 0.0%	Approach	Heat Transfer	New Customer	
<a href="#">Naveen Test - Testing_1</a>	Demo DSR Golden	General Manufacturing	20,000 / 50.0%	Prospect	Hydraulic, Omala, Morlina, Corena, Tonna, Heat Transfer	New Customer	
<a href="#">Isteer - 1</a>	Demo DSR Golden	Mining	10,000 / 0.0%	Approach	Tonna, Heat Transfer	New Customer	
<a href="#">Kumar - New</a>	Demo DSR Golden	General Manufacturing	6,000 / 0.0%	Suspect	Rimula	New Customer	
<a href="#">Vinoth - New</a>	Demo DSR Golden	Fleet	5,000 / 0.0%	Suspect	Corena	New Customer	

## 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.

# Data : Opportunity List/Download

iSteer Sales Channel < Data > Opportunity List/Download

Welcome To iSteer Sales Channel

SHELL TEST DSM ALL

FILTERS

Customer Opportunity +

Opportunity Name	DSR	Sector	Volume (L) / Premium (%)	Stage	Products / Services	Opportunity Type	Actions
<a href="#">reassign_opp_1</a>		Construction	0 / 0.0%	Reject			
<a href="#">reassign_opp_2</a>		Mining	0 / 0.0%	Reject			
<a href="#">reassign_opp_3</a>		Mining	0 / 0.0%	Reject			
<a href="#">reassign_opp_4</a>	Shell Test DSM All	Fleet	0 / 0.0%	Retention			
<a href="#">reassign_opp_5</a>	Demo DSR Golden	General Manufacturing	0 / 0.0%	Reject			Documents
<a href="#">reassign_opp_7</a>	Demo DSR Golden	Agriculture	0 / 0.0%	Reject			Keynotes
<a href="#">reassign_opp_8 - Test</a>	Demo DSR Golden	Metal	6 / 0.0%	Order	Tonna, Morlina, Hydraulic	Up	Reminder
<a href="#">reassign_opp_9</a>	Demo DSR Golden	Power	0 / 0.0%	Reject			+ Add Visit Planning
<a href="#">reassign_opp_10 - Test</a>	Demo DSR Golden	Agriculture	8 / 0.0%	Order	Corena, Omala, Hydraulic	Up Sell	Edit

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## 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

The screenshot shows the iSteer Sales Channel interface. A modal window titled "Related Opportunities" is open, displaying a table of related opportunities. The table has the following data:

Opportunity Name	Volume (t)	Stage	Sector	Product
New	500.0	Suspect	General Manufacturing	Omala, Morlina
A	10,000,000.0	Approach	Power	Heat Transfer

## Notes:

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

# Data : Opportunity List/Download - Customer Picture of Success

The screenshot displays the 'Customer Picture of Success' window for an opportunity named 'Android 1'. The window is divided into several sections:

- Opportunity Volume Analysis (KL):**

Total	1	Converted	0
Target	0	Actual	0
- Premium (KL):**

Opportunity	0
Actual	0
- Visit Pattern:**

Visited	1 #
Last Visit	21-Dec
- Product Pattern (%):**

Mainstream	100
Premium	0
- Services:**

Potential	0
-----------	---

Below these sections is a table with tabs for 'Movement' and 'Product'. The 'Movement' tab is active, showing the following data:

Opportunity Name	Total Number of Days	Suspect - Negotiate	Negotiate - Order
A1	150	10	140
S	138	138	0

The background shows the 'Opportunity List/Download' interface with a list of opportunities and filters.

## 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).

# Data : Opportunity List/Download – Sustainability Product

The screenshot shows the iSteer Sales Channel interface. The main window displays an 'Opportunity List/Download' table with columns: Opportunity Name, DSR, Sector, Volume (l) / Premium (%), Stage, Products / Services, Opportunity Type, and Actions. A 'Services' modal window is open, showing a table with columns: No., Service Name, and Quantity. The table contains one row: '1 LubeVideoCheck' with a quantity of '90'. The modal also shows 'Los Construction, 270.0 (l), Retention'.

No.	Service Name	Quantity
1	LubeVideoCheck	90

## 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.



# Data : Opportunity List/Download – Opportunity Location

The screenshot shows the iSteer Sales Channel interface. The main header displays "iSteer Sales Channel" and "Data > Opportunity List/Download". The user is identified as "SHELL TEST DSM ALL". The interface includes a sidebar with navigation options like "Masters", "Data", "Annual Target", "Opportunity", "Reassign Opportunity", "Data Upload", "Actual Sales", "Travel Allowance", "Campaign", "Reports", "Coaching", "Champions", "Marketing", "Terms & Conditions", "How to Use", and "Help". The main content area shows a "Customer" dropdown set to "Opportunity" and a "Filters" section with "Select Sector", "Select Branch", and "Select DSR" all set to "All". There are also "From Date" and "To Date" fields and a "SEARCH" button. The "Opportunity Location" map is displayed, showing a world map with red location pins in Africa, the Middle East, and North America. The map includes "Map" and "Satellite" tabs, a "Map data ©2022" notice, and "Terms of Use" link.

## 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.

# Data : Opportunity List/Download – Customer Tab

The screenshot shows the iSteer Sales Channel interface. The left sidebar contains navigation options like Masters, Data, Opportunity List/Download, and Campaign. The main area displays a table of reassign opportunities. The 'Customer' tab is selected, showing details for each opportunity including the customer name, DSR, volume, and premium percentage.

Customer Name	DSR	Volume (L)	Premium (%)
reassign opp 4	Shell Test D	0	0.0%
reassign opp 5	Demo DSR Gol	0	0.0%
reassign opp 6	Demo DSR Gol	1,000	0.0%
reassign opp 7	Demo DSR Gol	0	0.0%
reassign opp 8	Demo DSR Gol	256	0.0%
reassign opp 9	Demo DSR Gol	0	0.0%
reassign opp 10	Demo DSR Gol	8	0.0%
reassign opp 11	Demo DSR Gol	0	0.0%
reassign opp 12	Demo DSR Gol	0	0.0%

## 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.

# Data : Opportunity List/Download – Customer Tab

The screenshot displays the iSteer Sales Channel interface. The main window shows the 'Opportunity List/Download' screen with a table of opportunities. A modal window titled 'Related Opportunities' is open, showing a table with one row of data. The modal also displays a list of actions for the selected opportunity.

Customer Name	Opportunity Name	Volume (t)	Stage	Sector	Product	Actions
reassign opp 6	Color Test	1,000.0	Negotiate	Agriculture	Hec	<ul style="list-style-type: none"><li>Documents</li><li>Keynotes</li><li>Reminder</li><li>+ Add Visit Planning</li><li><b>Edit</b></li><li>Delete</li><li>Picture of Success</li></ul>

## Notes:

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

# Data : Opportunity From Brand

iSteer Sales Channel < Data > Opportunity From Brand

Welcome To iSteer Sales Channel

SHELL TEST DSM ALL

FILTERS

All Pending for Action

Customer Name	DSR	Sector	Volume (l) / Premium (%)	Stage	Products / Services	Opportunity Type	Actions
<a href="#">spancop_test_1</a>		General Manu	0 0.0%	Pending			
<a href="#">spancop_test_2</a>		Construction	0 0.0%	Pending			
<a href="#">spancop_test_3</a>		Construction	0 0.0%	Pending			
<a href="#">spancop_test_4</a>		General Manu	0 0.0%	Pending			
<a href="#">spancop_test_5</a>		Fleet	0 0.0%	Pending			
<a href="#">spancop_test_6</a>		Construction	0 0.0%	Pending			
<a href="#">spancop_test_7</a>		General Manu	0 0.0%	Pending			
<a href="#">reassign_opp_1</a>		Construction	0 0.0%	Reject			
<a href="#">reassign_opp_2</a>		Mining	0 0.0%	Reject			
<a href="#">reassign_opp_3</a>		Mining	0 0.0%	Reject			

Activate Windows  
Go to Settings to activate Windows.

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## 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.

# Data : Reassign Opportunity

Reassign Opportunity

Customer Name	Sector	Stage	Volume	Location
reassign opp 4	Fleet	Retention	0.000000	chennai

## 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.

# Data : Data Upload - Opportunity

Shell Pipeline Manager

Data > Data Upload

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

Opportunity Actual Sales

\*File Name Should not have spaces and special characters.  
The system supports excel created from Microsoft Excel only. If you have created the file in any other application, open and save the file in Microsoft Excel and then upload it. If you still face any other problem, send the file to us.

Campaign Name \* By Brand \*

SAMPLE FILE UPLOAD (.xls/.xlsx)

## 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.

# Data : Data Upload – Actual Sales

The screenshot shows the 'Data Upload' interface in the Shell Pipeline Manager. The left sidebar contains a navigation menu with items like Masters, Data, Annual Target Entry, Opportunity List/Download, Opportunity From Shell, Reassign Opportunity, Data Upload (highlighted), Actual Sales Report, and Calendars. The main content area has a breadcrumb 'Data > Data Upload', a welcome message 'Welcome To Shell Pipeline Manager', and a user profile 'SHELL TEST DSM ALL'. There are two tabs: 'Opportunity' and 'Actual Sales' (selected). A yellow warning box contains the text: '\*File Name Should not have spaces and special characters. The system supports excel created from Microsoft Excel only. If you have created the file in any other application, open and save the file in Microsoft Excel and then upload it. If you still face any other problem, send the file to us.' Below the warning, there is a red button labeled 'SALES SAMPLE FILE' and a yellow 'UPLOAD (.xls/.xlsx)' button with an upload icon.

## 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.

# Data : Actual Sales Report

Shell Pipeline Manager

Data > Actual Sales Report

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

Filters

Sales Data till 08-Aug-2021

Invoice Date	Invoice No	Customer Name	Customer Code	DSR Name	Product Name	SKU Product Name	SKU Code	Volume (L)	Edit	Delete
<b>Total</b>								6,000		
08-Aug-2021		Customer 06	249621	Shell Test DSM All	Morlina S3 BA 460	Morlina S3 BA 460_BULK_AO	500005692	1000.00		
07-Aug-2021		Customer 05	249620	Shell Test DSM All	Morlina S3 BA 460	Morlina S3 BA 460_BULK_AO	500005692	1000.00		
06-Aug-2021		Customer 04	249619	Shell Test DSM All	Morlina S3 BA 460	Morlina S3 BA 460_BULK_AO	500005692	1000.00		
05-Aug-2021		Customer 03	249618	Shell Test DSM All	Morlina S3 BA 460	Morlina S3 BA 460_BULK_AO	500005692	1000.00		
04-Aug-2021		Customer 02	249617	Shell Test DSM All	Morlina S3 BA 460	Morlina S3 BA 460_BULK_AO	500005692	1000.00		
03-Aug-2021		Customer 01	249616	Shell Test DSM All	Morlina S3 BA 460	Morlina S3 BA 460_BULK_AO	500005692	1000.00		

Activate Windows  
Go to Settings to activate Windows.

5 1 - 6 of 6

## 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



# Data : Inventory Report

Shell Pipeline Manager

Data > Inventory Report

Welcome To Shell Pipeline Manager

MICHAEL THE DSM

FILTERS

Select SKU

All From Date To Date

SEARCH

CLEAR FILTERS

Invoice Date	Product Name	SKU Product Name	SKU Code	Volume (L)
18-Jun-2014	Helix Ultra Professional AF 5W-30 (A5/B5 M2C-913D)	001E9387	550040265	0
04-Oct-2018	Helix HX8 Synthetic 5W-30 (SL A3/B4 MB229.3)	001E9067	550040545	0
21-Feb-2015	Helix Ultra Professional AF 5W-30 (A5/B5 M2C-913D)	001E9387	550042754	1680
12-Jun-2015	Profleet	Profleet	550042831	1100
22-Nov-2016	Helix Ultra Professional AF 5W-20 (SN A1/B1 M2C-948B)	001F2286	550044933	0
18-May-2016	Helix HX8 Synthetic ECT C3 5W-30 (C3)	001F9488	550045056	3904
06-Sep-2016	Helix HX8 Synthetic ECT C3 5W-30 (C3)	001F9488	550045057	132
02-Mar-2017	Helix Ultra Professional AS-L 0W-20 (VCC RBSO-2AE)	001F3936	550045107	0

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## Notes:

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

# Data : Calendars

Shell Pipeline Manager

Data > Calendars

Welcome To Shell Pipeline Manager

MICHAEL THE DSM

Calendar Name	Status
---------------	--------

## 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 Channel to other calendars only
- \$2 will be charged for each calendar.

# Data : Money Collection Report

Shell Pipeline Manager

Data > Money Collection Report

Welcome To Shell Pipeline Manager

MICHAEL THE DSM

FILTERS

Date	Customer Name	DSR Name	Collection Type	Receipt No. / Cheque No.	Amount	Edit	Delete
10-May-2021	Govind	Demo DFITS Global	Credit	fhh466	539		
10-May-2021	DfIts New	Demo DFITS Global	Cheque	fshhjs	4,646		
10-May-2021	Diamond	Demo DFITS Global	Cheque	sghs	6,565		
11-May-2021	DfIts New	Demo DFITS Global	Cheque	vhh234	2,369		
11-May-2021	Final Test	Test DSR One	Cash	42580	2,386		
11-May-2021	Final Test	Test DSR One	Credit	dghb567	5,369		
11-May-2021	Final Test	Test DSR One	Cheque	gshsn	3,434		
11-May-2021	Ios My Review	Test DSR One	Cash	5468998	3,768		
11-May-2021	Final Test	Test DSR One	Credit	dghehe	5,664		
11-May-2021	Final Test	Test DSR One	Credit	vzvzv	8,797		

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## 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.

# Campaign: Create Campaign - Email

The screenshot displays the 'Shell Pipeline Manager' interface for creating an email campaign. The left sidebar contains a navigation menu with the following items: Shell Pipeline Manager, Masters, Data, Campaign, Create Campaign (selected), Email, Report, Reports, Site Assessment, Coaching Module, Marketing Materials, Terms & Conditions, How to Use, and Help. The main content area shows the breadcrumb 'Campaign > Create Campaign > Email' and a welcome message 'Welcome To Shell Pipeline Manager' with a 'Payment' button. A progress bar at the top indicates the current step is 'Email Campaign', with other steps being 'Template', 'Select Contacts', and 'Send'. Below the progress bar, the title 'Select Email Campaign' is followed by four template options: 'Product Demo' (gift icon), 'Discount' (percentage icon), 'Festival Wishes' (party hat icon), and 'General Email' (list icon).

## Notes:

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

# Campaign: Create Campaign - Email

Shell Pipeline Manager

Campaign > Create Campaign > Email

Welcome To Shell Pipeline Manager Payment

SHELL TEST DISTRIBUTOR 1

Email Campaign Template Select Contacts Send

Type Title here

Change picture

Sub Test 1 Comes Here

When oil degrades, it can create friction that reduces engine efficiency and leads to power loss. Shell Advance Ultra does not degrade between oil changes, so your bikes can perform at it's best.

Contact

You can email us at [shelltest@shell.com](mailto:shelltest@shell.com) for any queries  
Unsubscribe from this list

CONTINUE

Campaign Name

Shell Logo

Distributor Logo

Enable Contact Button

## 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.

# Campaign: Create Campaign - Email

Shell Pipeline Manager

Campaign > Create Campaign > Email

Welcome To Shell Pipeline Manager Payment

SHELL TEST DISTRIBUTOR 1

Email Campaign Template Select Contacts Send

Type Title here

Change picture

Sub Test 1 Comes Here

Discount 50%

Contact

You can email us at [shelltest@shell.com](mailto:shelltest@shell.com) for any queries  
Unsubscribe from this list

## Notes:

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

# Campaign: Create Campaign - Email

Shell Pipeline Manager

Campaign > Create Campaign > Email

Welcome To Shell Pipeline Manager Payment

SHELL TEST DISTRIBUTOR 1

Email Campaign Template Select Contacts Send

Campaign Name

Shell Logo

Distributor Logo

Change picture

You can email us at [shelltest@shell.com](mailto:shelltest@shell.com) for any queries  
Unsubscribe from this list

CONTINUE

## Notes:

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

# Campaign: Create Campaign - Email

Shell Pipeline Manager

Campaign > Create Campaign > Email

Welcome To Shell Pipeline Manager Payment

SHELL TEST DISTRIBUTOR 1

Email Campaign Template Select Contacts Send

Campaign Name

Shell Logo

Distributor Logo

Enable Contact Button

**Sub Test 1 Comes Here**

When oil degrades, it can create friction that reduces engine efficiency and leads to power loss. Shell Advance Ultra does not degrade between oil changes, so your bikes can perform at it's best.

Contact

You can email us at [shelltest@shell.com](mailto:shelltest@shell.com) for any queries  
Unsubscribe from this list

CONTINUE

## Notes:

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



# Campaign: Create Campaign - Email

The screenshot displays the Shell Pipeline Manager interface for creating an email campaign. The breadcrumb navigation shows 'Campaign > Create Campaign > Email'. The progress bar indicates the current step is 'Select Contacts'. The search area contains the text 'Location, Sector, Email' and 'No Records found'. The user profile at the top right is 'SHELL TEST DISTRIBUTOR 1'. The Windows taskbar at the bottom shows the date as 3/31/2022 and the time as 6:04 PM.

## Notes:

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

# Campaign: Create Campaign - Email

Shell Pipeline Manager < Campaign > Create Campaign > Email

Welcome To Shell Pipeline Manager Payment

SHELL TEST DISTRIBUTOR 1

Email Campaign Template Select Contacts Send

Pipeline Upload Groups

Location, Sector, Email × Search Selected User Count (0)

No Records found

Customer Name Email \* ADD EMAIL

Group Name

SAMPLE FILE UPLOAD (.xls/.xlsx)

CONTINUE

## Notes:

- A user can select an email to send.
- User can choose either one customer 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.

# Campaign: Create Campaign - Email

Shell Pipeline Manager

Campaign > Create Campaign > Email

Welcome To Shell Pipeline Manager Payment

SHELL TEST DISTRIBUTOR 1

Email Campaign Template Select Contacts Send

Location, Sector, Email × Search

Pipeline Upload Groups

Selected User Count (0)

CONTINUE

## Notes:

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

# Campaign: Create Campaign - Email

Shell Pipeline Manager

Campaign > Create Campaign > Email

Welcome To Shell Pipeline Manager Payment

SHELL TEST DISTRIBUTOR 1

Email Campaign Template Select Contacts Send

Right Now

Schedule

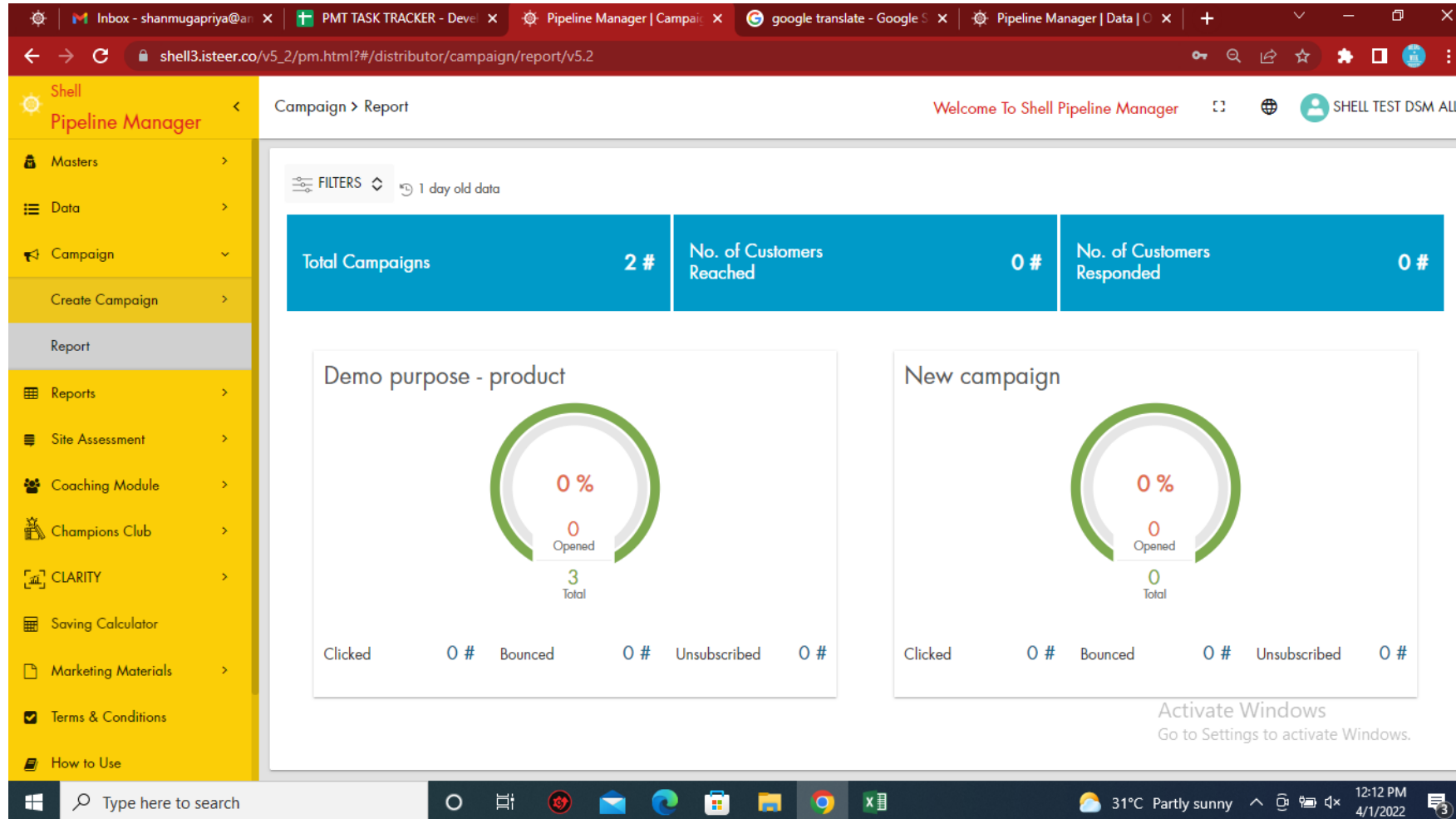
Date \*

SEND

## 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.

# 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.

# Campaign: Create Campaign - SMS

The screenshot shows the 'Shell Pipeline Manager' interface. The left sidebar contains a navigation menu with items: Campaign, Create Campaign, Email, SMS (highlighted), Report, Reports, Site Assessment, Coaching Module, Champions Club, CLARITY, Saving Calculator, Marketing Materials, Terms & Conditions, How to Use, and Help. The main content area is titled 'Campaign > Create Campaign > SMS'. At the top right, it says 'Welcome To Shell Pipeline Manager' and 'SHELL TEST DSM ALL'. A progress bar at the top indicates three steps: 'Template' (current), 'Select Contacts', and 'Send'. Below the progress bar, there are two input fields: 'Campaign Name \*' with the value 'Test' and 'SMS Content \*' with the value 'releasing a new product'. A 'Character Count - 23' indicator is visible next to the SMS content field. A yellow 'CONTINUE' button is located at the bottom right of the form area.

## Notes:

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

# Campaign: Create Campaign - SMS

Shell Pipeline Manager

Campaign > Create Campaign > SMS

Welcome To Shell Pipeline Manager SHELL TEST DSM ALL

Template Select Contacts Send

Location, Sector, Phone Search Selected User Count (2)

Select All

<input checked="" type="checkbox"/> Raj - 70175447886	<input type="checkbox"/> Ravi - 7558356788	<input type="checkbox"/> Priya 05 - 987654321
<input checked="" type="checkbox"/> Kumaran - 987654421	<input type="checkbox"/> Jana Test - 4564	<input type="checkbox"/> Shanmuga - 4864
<input type="checkbox"/> Testttttt - 56677888787	<input type="checkbox"/> Thara -	<input type="checkbox"/> Shanmu - ttgg
<input type="checkbox"/> Shanmugapriya - 234567	<input type="checkbox"/> Mani - bahah	<input type="checkbox"/> Raj - jccuc
<input type="checkbox"/> Hsjsb - hjjggfthvjcju	<input type="checkbox"/> Ram - 9787167348	<input type="checkbox"/> Sathya - 6392963920

CONTINUE

## Notes:

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

# Reports : SPANCOP Dashboard - Summary

Reports > SPANCOP Dashboard

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

**SPANCOP Dashboard**

Summary | DSR wise Details

	Open				Won					
	Suspect		Prospect / Approach		Negotiate / Close		Order / Payment		Lost	
	Volume (KL)	No. of Customers	Volume (KL)	No. of Customers	Volume (KL)	No. of Customers	Volume (KL)	No. of Customers	Volume (KL)	No. of Customers
<b>Overall Distributor</b>	17	6	26	12	36	6	2	11	0	0
<b>Main Branch Overall</b>	15	1	7	7	16	2	0	2	0	0
<b>Malacca Overall</b>	2	5	19	5	20	4	2	9	0	0

## 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.



# Reports : SPANCOP Dashboard - DSR wise Details

Shell Pipeline Manager

Reports > SPANCOP Dashboard

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

FILTERS

Select LOB: All | Select Sector: All | SEARCH

CLEAR FILTERS

Summary | **DSR wise Details** | Download

### SPANCOP Dashboard

	Open				Won				Lost	
	Suspect		Prospect / Approach		Negotiate / Close		Order / Payment		Lost	
	Volume (KL)	No. of Customers	Volume (KL)	No. of Customers	Volume (KL)	No. of Customers	Volume (KL)	No. of Customers	Volume (KL)	No. of Customers
<b>Main Branch</b>										
Overall	15	3	7	7	16	2	0	2	0	0
Ian The DFITS	0	0	0	0	0	0	0	0	0	0
Shell Test DSM All	15	2	7	6	0	0	0	2	0	0
Shell Test Distributor A	0	1	0	1	16	2	0	0	0	0
<b>Malacca</b>										
Overall	0	6	1	3	21	5	2	15	0	0

**Notes:**

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

# Reports : SPANCOP Movement Report

Shell Pipeline Manager

Reports > SPANCOP Movement Report

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

31-Mar-2022

FILTERS

Select Branch: All | Select DSR: All | SPANCOP Stage: All | Select Sector: All | Date: 31-Mar-2022

SEARCH

SPANCOP Movement Report Real time data

Click the count to view the Customer in Suspect Stage

DSR	Suspect	Prospect	Approach	Negotiate	Order	Lost	Pending	Customer not moved in last 180 days	Customer not moved in last 90 days	Customer in last 30 days
Demo DSR	3	1	1	0	0	0	0	10	28	
Golden	0	0	0	0	0	0	0	0	0	
Demo Golden	0	0	0	0	0	0	0	0	0	
DOEM	0	0	0	0	0	0	0	0	0	
Shell Test DSM All	0	0	0	0	0	0	0	0	0	

## 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.

# Reports : SPANCOP Movement Report

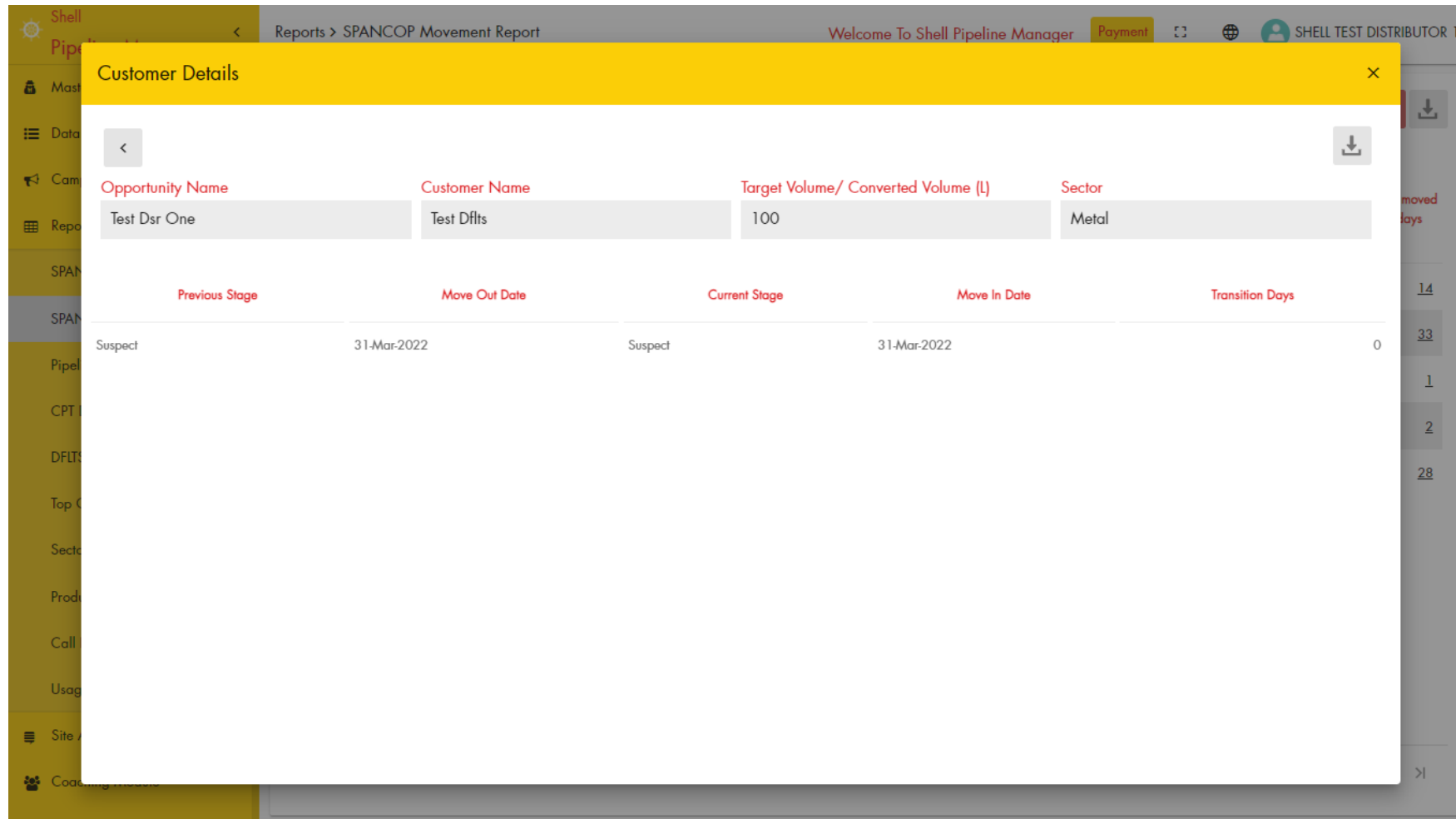
The screenshot shows a web application interface for 'Shell Pipeline Manager'. A modal window titled 'Status Details' is open, displaying a table of customer data. The table has columns for No, Customer Name, Opportunity Name, Current Stage, Last Stage, Lead Generation Date, Transition Days, Annual Target (L), Target / Converted Volume (L), Sector, Last Visited Date, and Total Visits. The data is as follows:

No	Customer Name	Opportunity Name	Current Stage	Last Stage	Lead Generation Date	Transition Days	Annual Target (L)	Target / Converted Volume (L)	Sector	Last Visited Date	Total Visits
4	<a href="#">Test Dflts</a>	Test Dsr One	Suspect	Suspect	24-Feb-2022	0	200	100	Metal	Not Visited	0
5	<a href="#">Test Dflts</a>	Test Dsr One	Suspect	Suspect	24-Feb-2022	0	200	100	Metal	Not Visited	0
6	<a href="#">Test One Dsr</a>	Tt	Suspect	Suspect	31-Mar-2022	0	200	200	Fleet	Not Visited	0
7	<a href="#">Testing_07</a>	lbsibd	Suspect	Suspect	16-Mar-2022	0	2	2	Construction	Not Visited	0
8	<a href="#">Testing_Dsr_07</a>	Dsr One	Suspect	Suspect	31-Mar-2022	0	200	200	Construction	Not Visited	0
9	<a href="#">Thara17</a>	Dsr One 14	Suspect	Suspect	31-Mar-2022	0	500	500	Mining	Not Visited	0

## Notes:

- To view a detailed report of a customer, click on the customer's name
- All the current stages, last stages, 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

# Reports : SPANCOP Movement Report



The screenshot shows the 'Customer Details' modal window in the Shell Pipeline Manager. The modal is titled 'Customer Details' and has a close button (X) in the top right corner. It contains a table with the following data:

Opportunity Name	Customer Name	Target Volume/ Converted Volume (l)	Sector
Test Dsr One	Test Dflts	100	Metal

Previous Stage	Move Out Date	Current Stage	Move In Date	Transition Days
Suspect	31-Mar-2022	Suspect	31-Mar-2022	0

## 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.

# Reports : Pipeline Dashboard - Summary

Shell Pipeline Manager

Reports > Pipeline Dashboard

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

FILTERS

Select LOB: All | Select Sector: All | SEARCH

CLEAR FILTERS

Summary | DSR wise Details

### Pipeline Dashboard

	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)
<b>Overall Distributor</b>	629	0.0	1	3	17	45	17	37	37.4	33.5	2	323
<b>Main Branch Overall</b>	420	0.0	0	0	2	23	9	16	3.5	0.0	0	309
<b>Malacca Overall</b>	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.

# Reports : Pipeline Dashboard – DSR wise Details

Shell Pipeline Manager

Reports > Pipeline Dashboard

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

FILTERS

Select LOB: All | Select Sector: All | SEARCH

CLEAR FILTERS

Summary | **DSR wise Details** | Download

### Pipeline Dashboard

	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)
<b>Main Branch</b>												
Overall	420	0.0	0	0	2	23	9	16	3.5	0.0	0	309
lan The DFLTS	0	0.0	0	0	0	0	0	0	0.0	0.0	0	0
Shell Test DSM All	420	0.0	0	0	2	7	6	0	11.4	0.0	0	310
Shell Test Distributor A	0	0.0	0	0	0	16	3	16	0.0	0.0	0	1
<b>Malacca</b>												
Overall	209	0.0	10	2	15	22	8	21	73.3	47.6	3	14
James The DSR	209	0.0	10	2	15	22	8	21	73.3	47.6	3	14

## 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

Shell Pipeline Manager

Reports > CPT Dashboard

Welcome To Shell Pipeline Manager

Payment

SHELL TEST DISTRIBUTOR A

FILTERS

Monthly Summary DSR wise Details

CPT Dashboard - Real time data

Feb-2022	Total Universe (#)	No. of Calls (#)	Coverage (%)	Penetration (%)	Throughput (L)	Shell Helix Sell-Out Volume (KL)
Main Branch <input checked="" type="checkbox"/>						
Overall	64	256	70.0	43.0	9,770	0

## 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.

# Reports : CPT Dashboard - Summary

Shell Pipeline Manager

Reports > CPT Dashboard

Welcome To Shell Pipeline Manager

Payment

SHELL TEST DISTRIBUTOR A

Filters

Monthly Summary DSR wise Details

CPT Dashboard - Real time data

	Feb-2022	Total Universe (#)	No. of Calls (#)	Coverage (%)	Penetration (%)	Throughput (L)	Shell Helix Sell-Out Volume (L)					
Last 12 Months CPT for null												
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.



# Reports : CPT Dashboard - DSR wise Details

Shell Pipeline Manager

Reports > CPT Dashboard

Welcome To Shell Pipeline Manager Payment SHELL TEST DISTRIBUTOR A

Filters: Monthly | Summary | **DSR wise Details** | Download

CPT Dashboard - Real time data

Feb-2022	Total Universe (#)	No. of Calls (#)	Coverage (%)	Penetration (%)	Throughput (L)	Shell Helix Sell-Out Volume (KL)
<b>Main Branch</b>						
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.

# Reports : CPT Dashboard - DSR wise Details

The screenshot displays the 'Shell Pipeline Manager' interface. A modal window titled 'Select Product Family' is open, showing a list of product families with checkboxes. The selected products are Helix, Volkswagen FFO, and General Motors GPO. The background dashboard shows a table with columns for Penetration (%), Throughput (L), and Shell Helix Sell-Out Volume (KL). The table data is as follows:

Penetration (%)	Throughput (L)	Shell Helix Sell-Out Volume (KL)
0.0	0	0

## Notes:

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

# Reports : DFLTS Performance

Shell Pipeline Manager

Reports > DFLTS Performance

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

DFLTS Name	Number of Visits	WON			Site Assessment	DVR Development	OEM Approval	Coaching	LubeCoach Training / People	LubeAnalyst Activation / Sample	Field Trial	Number of Customers
		Number of Customers	Total Volume (KL)	Premium Volume (KL)								
Demo DFLTS Golden (560)	Actual	0	16	11	4	0	0	0	2 / 4	0 / 0	0	56
	Target	40	10	10	10	10	10	10				

10 | 1 - 2 of 2 | < >

## 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.

# Reports : Top Customers - Pipeline

Shell Pipeline Manager

Reports > Top Customers

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

FILTERS

CLEAR FILTERS

Select Branch: All | Select DSR: All | LOB: All | Select Sector: All

SEARCH

Pipeline | Actual Sales

Customer Name	DSR Name	Sector	Volume (KL)	Premium (%)	SPANCOP	Product	Customer Type	Actions
<a href="#">D.Car Service</a>	James The DSR	Independent Workshop	15	100	Negotiate	Helix		
<a href="#">Shxh</a>	Shell Test Distributor A	Mining	8	0	Negotiate	AeroShell		
<a href="#">Shxh</a>	Shell Test Distributor A	Mining	8	0	Negotiate	AeroShell		
<a href="#">Sumit Test</a>	James The DSR	General Manufacturing	5	20	Negotiate	Tellus	OEM	
<a href="#">Dhhxt</a>	James The DSR	Fleet	4	0	Approach	Morlina		
<a href="#">Ks Industry</a>	James The DSR	Agriculture	0	2	Negotiate	Corena	OEM,GKA	
<a href="#">Test Shell</a>	James The DSR	Mining	0	0	Negotiate	Shell Services		
<a href="#">Zbgs</a>	James The DSR	Agriculture	0	0	Approach	Shell Services		

Rows per page: 100 | 1 - 12 of 12

## 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.

# Reports : Top Customers - Pipeline

**View Opportunity**

Select DSR *	Lead Generation Date *	Customer Name *	Select Customer Location *	
James The DSR	02-Jun-2020	D Car Service	Istanbul	
Customer Sector *	Opportunity Type *	Customer Type		
Independent Workshop	New Customer	None		
SPANCOP Stage *	Top 5 Prospect *	Total Annual Potential (L) *	Targeted Volume (L) *	Premium % in Opportunity
Negotiate	Yes	25000	15000	100
Estimated Order Date *	Product Group in Scope *	Service Opportunity *	DFLTS Support Required *	
31-Aug-2020	Helix	No	No	
Registration No	Current Supplier	Additional Field 1		
	castrol			
Additional Field 2	Additional Field 3	Visit Frequency	Order Pattern	
		Monthly	Bi Weekly	

## Notes:

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

# Reports : Top Customers – Actual Sales

The screenshot shows the 'Shell Pipeline Manager' interface. The left-hand navigation menu is yellow and contains the following items: Shell Pipeline Manager, Masters, Data, Reports, SPANCOP Dashboard, Pipeline Dashboard, CPT Dashboard, DFLTS Performance, Top Customers (highlighted), Sector Split, Product Split, Call Planning, Coaching, Site Assessment, Marketing Materials, and Terms & Conditions. The main content area is titled 'Reports > Top Customers' and includes a 'Welcome To Shell Pipeline Manager' message. The interface features a 'FILTERS' section with dropdown menus for 'Select Branch' (All), 'Select DSR' (All), 'LOB' (All), and 'Select Sector' (All). A 'SEARCH' button is also present. Below the filters, there are tabs for 'Pipeline' and 'Actual Sales' (selected), along with a download icon. The main table displays the following data:

Customer Name	DSR Name	Sector	Volume (KL)	Product
D Car Service	James The DSR	Independent Workshop	1.5	Helix
Shxh	Shell Test Distributor A	Mining	8	AeroShell
Shxh	Shell Test Distributor A	Mining	8	AeroShell
Sumit Test	James The DSR	General Manufacturing	5	Tellus
Dhhxt	James The DSR	Fleet	4	Morlina
Ks Industry	James The DSR	Agriculture	0	Corena
Test Shell	James The DSR	Mining	0	Shell Services
Zbgs	James The DSR	Agriculture	0	Shell Services

At the bottom of the table, there is a pagination control showing 'Rows per page: 100' and '1 - 12 of 12' with navigation arrows.

## 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.

# Reports : Sector Split - Pipeline

Shell Pipeline Manager

Reports > Sector Split

Welcome To Shell Pipeline Manager DEMO COUNTRY

Filters

Sector Split - Real time data

Open Won

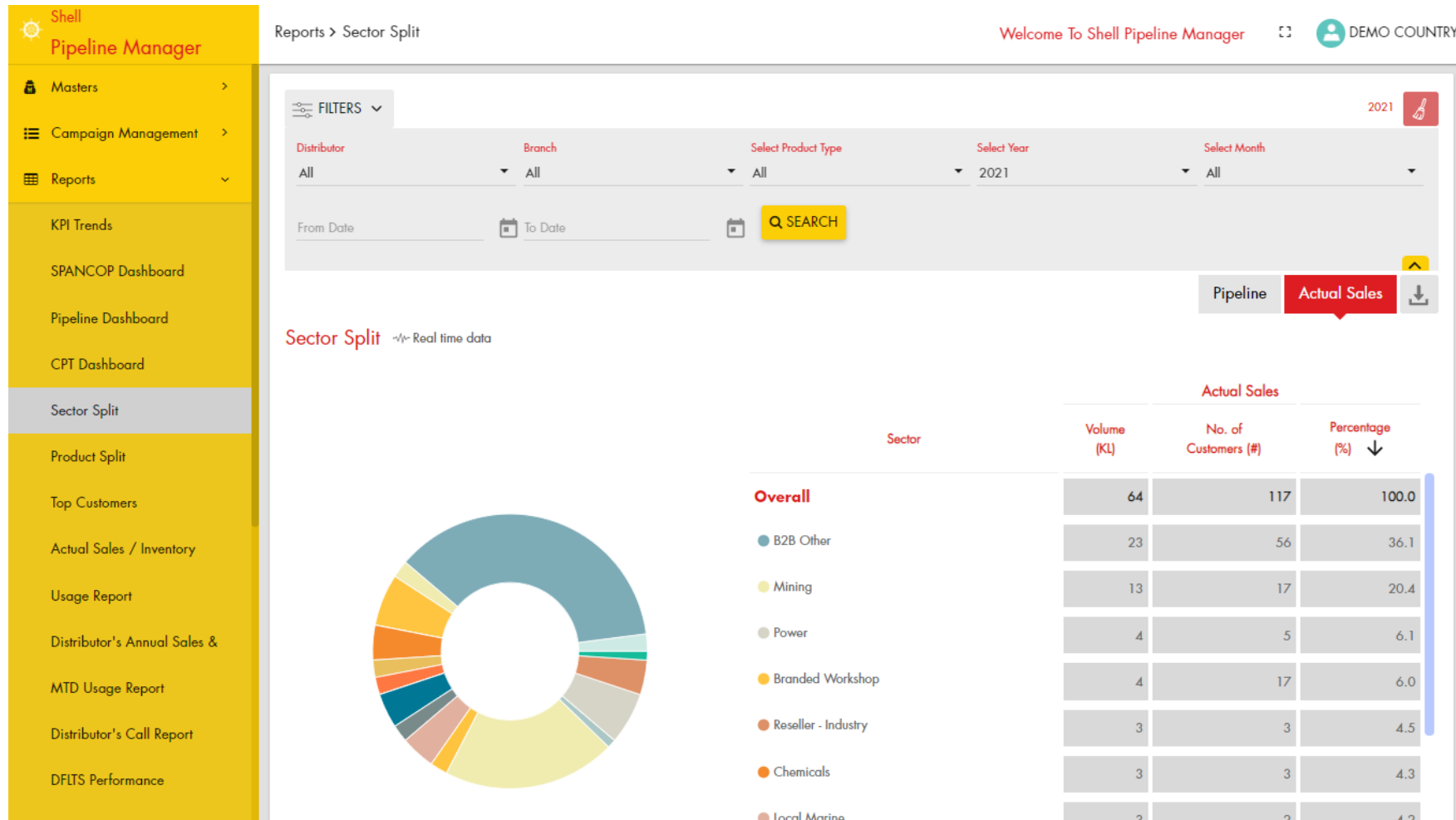
Sector	Open			Won CYI		
	Volume (KL)	No. of Customers (#)	Percentage (%) ↓	Volume (KL)	No. of Customers (#)	Percentage (%) ↑
<b>Overall</b>	3,252	23	100.0	0	6	0.0
Construction	3,093	3	95.1	0	0	0.0
Sub sector Not Selected	3,093	3	100.0	0	0	0.0
Independent Workshop	75	3	2.3	0	0	0.0
Lube Shop / High Street	32	1	1.0	0	1	0.0
Franchised Workshop	22	1	0.7	0	1	0.0
Oil & Gas	11	2	0.3	0	0	0.0
Fleet	4	2	0.1	0	0	0.0

Pipeline Actual Sales

## 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.

# 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.



# Reports : Sector Split – Sustainability Product

Shell Pipeline Manager

Reports > Sector Split

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

Filters: Select Branch: All, Select DSR: All, Select Product: All, SPAN COP Stage: All, Select Product Type: Sustainability Products

SEARCH

Pipeline Actual Sales

### Sector Split

Sector	Open			Won CYI		
	Volume (Kl)	No. of Customers (#)	Percentage (%)	Volume (Kl)	No. of Customers (#)	Percentage (%)
<b>Overall</b>	9	8	100.2	0	1	84.9
Chemicals	9	1	91.0	0	0	0.0
Independent Workshop	1	1	5.3	0	0	0.0
General Manufacturing	0	1	2.1	0	0	0.0
Construction	0	2	1.1	0	0	0.0
Mining	0	2	0.4	0	0	0.0
Fleet	0	1	0.2	0	0	0.0
Power	0	0	0.0	0	1	84.9

**Notes:**

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

# Reports : Sector Split - NBS

Reports > Sector Split

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

Filters: Select Branch: All, Select DSR: All, Select Product: All, SPANCOP Stage: All, Select Product Type: Nature Base Solution

SEARCH

Buttons: Pipeline, Actual Sales, Download

### Sector Split

Open Won

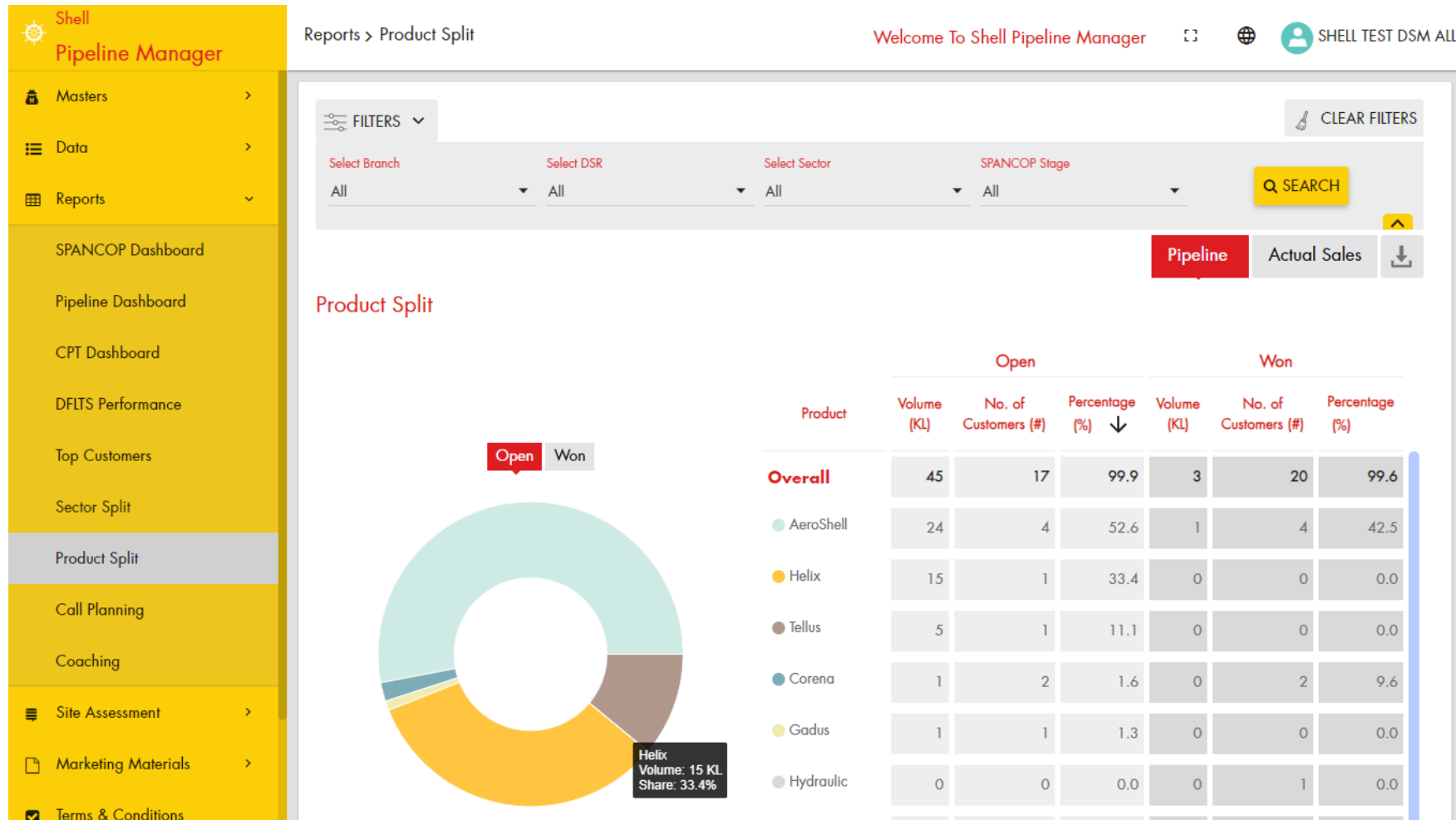
No data to display.

Sector	Open	Won CY1
	No. of Customers (#)	No. of Customers (#)
<b>Overall</b>	7	2
Power	0	1
Mining	1	1
Independent Workshop	1	0
General Manufacturing	1	0
Construction	2	0
Chemicals	2	0

**Notes:**

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

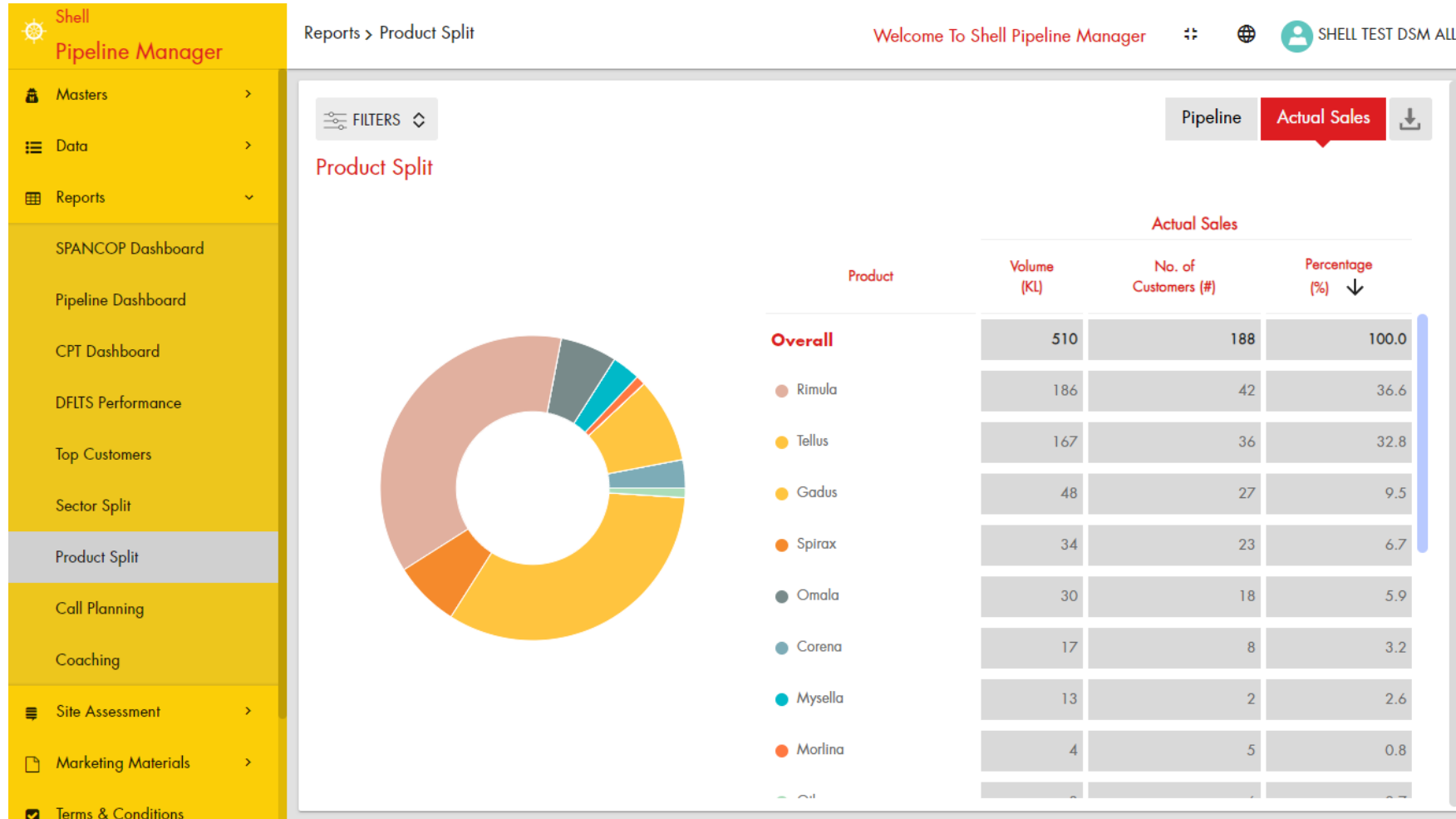
# Reports : Product Split - Pipeline



## 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.

# Reports : Product Split - Actual Sales



**Notes:**

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

# Reports : Product Split - Actual Sales

Shell Pipeline Manager

Reports > Product Split

Welcome To Shell Pipeline Manager

MICHAEL THE DSM

Filters: Select Branch (All), Select DSR (All), Select Sector (All), SPANCOP Stage (All), Select Product Type (Sustainability Products)

SEARCH

Product Split

Open Won

Product	Open			Won CYI		
	Volume (KL)	No. of Customers (#)	Percentage (%) ↓	Volume (KL)	No. of Customers (#)	Percentage (%)
<b>Overall</b>	80	12	104.8	0	0	0.0
Omala	60	1	78.1	0	0	0.0
Gadus	7	2	9.1	0	0	0.0
Rhodina	5	5	7.1	0	0	0.0
Mysella	5	2	6.5	0	0	0.0
Naturelle	3	2	3.9	0	0	0.0

## 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

# Reports : Product Split - Actual Sales

Shell Pipeline Manager

Reports > Product Split

Welcome To Shell Pipeline Manager MICHAEL THE DSM

Filters: Select Branch (All), Select DSR (All), Select Sector (All), SPANCOP Stage (All), Select Product Type (Nature Base Solution)

SEARCH

Product Split

Open Won

No data to display.

Product	Actual Sales	
	Open No. of Customers (#)	Won CYI No. of Customers (#)
<b>Overall</b>	3	0
Tellus	1	0
Spirax	1	0
Omala	1	0
Gadus	1	0

## Notes:

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

# Reports : Call Planning - Summary

Shell Pipeline Manager

Reports > Call Planning

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

FILTERS

CLEAR FILTERS

Call Status: All | Select Branch: All | Select DSR: All | Select Visit Type: All

From Date: 01-Jul-2020 | To Date: 06-Jul-2020 | SEARCH

Summary | Details

DSR Name	No of Planned Visit	No of Closed Visit	No of Visited Customer	Effective Time (Minitis)
Shell Test Distributor A	1	0	0	
James The DSR	10	0	0	

Rows per page: 100 | 1 - 2 of 2

## 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.

# Reports : Call Planning - Details

Shell Pipeline Manager

Reports > Call Planning

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

FILTERS

CLEAR FILTERS

Call Status: All | Select Branch: All | Select DSR: All | Select Visit Type: All

From Date: [Calendar Icon] To Date: [Calendar Icon] [SEARCH]

Summary | Details | [Grid Icon] | [Download Icon]

Customer Name	DSR Name	Appointment Date	SPANCOP Stage	Volume (KL)	Customer Facing Time (H:M:S)	Call Status	Contact Person
<a href="#">D_Car_Service</a>	James The DSR	30-Jun-2020	Negotiate	15.0		Pending	
<a href="#">Shell1</a>	James The DSR	09-Jun-2020	Prospect	0.0		Overdue	
<a href="#">Sumit_Test</a>	James The DSR	09-Jun-2020	Negotiate	5.0		Closed	
<a href="#">Off1</a>	James The DSR	09-Jun-2020	Suspect	0.5	09:42:03	Closed	
<a href="#">Dhxt</a>	James The DSR	06-Jun-2020	Approach	4.2	18:49:58	Closed	
<a href="#">Test1</a>	James The DSR	06-Jun-2020	Prospect	1.0		Overdue	
<a href="#">Sbgs</a>	Demo Global DFITS	06-Jun-2020	Approach	0.0		Overdue	
<a href="#">Susi</a>	James The DSR	06-Jun-2020	Payment	0.5		Overdue	
<a href="#">Zbxj</a>	James The DSR	06-Jun-2020	Payment	0.0		Overdue	
<a href="#">Test1</a>	James The DSR	04-Jun-2020	Prospect	1.0		Overdue	

Rows per page: 100 | 1 - 100 of 112 | [Navigation Icons]

## 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.



# Reports : Call Planning - Details

The screenshot displays the 'Details' view for a call planning opportunity. The interface includes a sidebar with navigation options like 'Shell Pipeline Manager', 'Masters', 'Data', 'Reports', and various dashboards. The main content area is titled 'Confidence Infrastructure HO' and shows details for 'Mr. Saidul'. It includes a summary table with columns for SPANCOP Stage, Total Annual Potential (KL), Targeted Volume (KL), and Call Status. Below this, there are sections for 'POPSA', 'Objective', 'Premise', 'Anticipate', 'Call Report', and 'Previous Calls'. A secondary window on the right shows a mobile view of the same details.

SPANCOP Stage	Total Annual Potential (KL)	Targeted Volume (KL)	Call Status
Suspect	2	1	Closed

Appointment Date	Check In Date	Check Out Date
25-Nov-2021 09:12	25-Nov-2021 09:12	25-Nov-2021 09:52

**POPSA**

**Objective**  
Discussion regarding Shell Diala

**Premise**  
Existing Customer

**Anticipate**  
Product Availability.

**Call Report**

**Action Response**  
Follow Up.

**Meeting Discussion**  
Discussion regarding Shell Diala.

**Previous Calls**

Appointment Date	Call Status
22-Feb-2021 16:54	Closed

**Notes:**

- Detailed Report screen for the selected opportunity.

# Reports : Call Planning - Calendar

The screenshot shows the 'Calendar View' interface in the Shell Pipeline Manager. The calendar is for July 2020. The legend on the right lists the following users and their color codes:

- Shell Test Distributor A (Yellow)
- Shell Test DSM All (Black)
- James The DSR (Blue)

Sun	Mon	Tues	Wed	Thu	Fri	Sat
			1	2	3	4
			1		10	1
5	6	7	8	9	10	11
		1				
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

## Notes:

- The Calendar view contains call planning details for DSR and DFLTAs .
- 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.

# Reports : Call Planning

Call Plan Details

S.No	Appointment Date	Customer Name	DSR Name	Spancop Stage	Volume (L)	Call Status
1	04-Jul-2020	Oyo	Shell Test Distributor A	Suspect	0	Pending

## Notes:

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

# 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	<a href="#">Continuous Learning,Utilizing Marketing Material,P</a>	18
Shell Test Distributor B	DSM	Shell test DSR A	24-Oct-2019	<a href="#">Upselling/X-selling_Grooming,Application Based Sel</a>	18
Shell Test Distributor B	DSM	Shell test DSR A	31-Oct-2019	<a href="#">Pipeline Management (SPANCOP)</a>	4
Shell Test Distributor B	DSM	Shell test DSR A	31-Oct-2019	<a href="#">Value Selling Using RTBs</a>	2
Shell Test Distributor B	DSM	Shell test DSR A	02-Nov-2019	<a href="#">Application Based Selling_Call planning (POPSA)_Co</a>	6
Engin	Global	Shell test DSR A	03-Dec-2019	<a href="#">Utilizing Marketing Material,Negotiation/Comm unde</a>	6
Shell Test Distributor B	DSM	Shell test DSR A	06-Dec-2019	<a href="#">Call planning (POPSA)</a>	0
Shell Test Distributor B	DSM	Shell test DSR A	06-Dec-2019	<a href="#">Grooming_Call planning (POPSA),Business &amp; Market A</a>	24
Shell Test Distributor B	DSM	Shell test DSR A	06-Dec-2019	<a href="#">Relationship development,Pipeline Management (SPAN</a>	22
Shell Test Distributor B	DSM	Shell test DSR A	06-Dec-2019	<a href="#">Continuous Learning,Sales Planning_Call planning,(</a>	22
Shell Test Distributor B	DSM	Shell test DSR A	07-Dec-2019	<a href="#">Grooming,OEM/ISP liasoning, .Basic Plant Survey &amp; T</a>	22
Shell Test Distributor B	DSM	Shell test DSR A	18-Dec-2019	<a href="#">Application Based Selling,Negotiation/Comm underst</a>	12
Engin	Global	Shell test DSR A	18-Dec-2019	<a href="#">Listening,Negotiation/Comm understanding,Value Sel</a>	14
Engin	Global	Shell test DSR A	27-Dec-2019	<a href="#">Listening,Negotiation/Comm understanding,Sales Pla</a>	14
Shell Test Distributor B	DSM	Shell test DSR A	06-Jan-2020	<a href="#">Pipeline Management (SPANCOP),Utilizing Marketing</a>	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.

# Reports : Coaching – Coaching Call

Shell Pipeline Manager

Reports > Coaching

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

FILTERS

Select Branch: All | Select DSR: All | From Date: | To Date: | SEARCH

CLEAR FILTERS

Work With Call

Score

Assessee : Shell test DSR A  
Assessed By : Shell Test Distributor B  
Assessed Date : 23-Oct-2019

No.	Topic	Skill	Details
1	Continuous Learning	Behaviour	Dicusses the challenges/topics related to the sectors with ICAMS/DOs
2	Utilizing Marketing Material	Technical Skill	Confidently articulate and link tds and flyer to application selling page deriving benefits to customer indepen
3	Pipeline Management (SPANCOP)	Selling Skills	Manages multiple large, complex opportunities through the pipeline. Lead the team on pipeline management

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

Rows per page: 100 | 1 - 62 of 62

## Notes:

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

# Reports : Coaching – Work With Call

Shell Pipeline Manager

Reports > Coaching

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

FILTERS

CLEAR FILTERS

Select Branch: All | Select DSR: All | From Date: | To Date: | SEARCH

Coaching Call | **Work With Call** | Download

Coachee Name	Customer Name	Date	Accompanied by
James The DSR	123	18-Dec-2019	RTM
James The DSR	ABC Oil & Gas Ltd	26-Mar-2020	ICAM
James The DSR	Abcd	03-Feb-2020	DSM,RTM
James The DSR	Balamalay	03-Apr-2020	DSM
James The DSR	BGR Energy Systems Ltd	26-Mar-2020	DFITS,DSM,ICAM,STL
James The DSR	Durmaz Co.	07-Dec-2019	STL
James The DSR	Hav	09-Dec-2019	ICAM
James The DSR	Hema Test 01	27-Mar-2020	DFITS,DSM
James The DSR	los V123	06-Dec-2019	ICAM
James The DSR	los---	02-Nov-2019	ICAM
James The DSR	Jeo	03-Feb-2020	RTM
James The DSR	Kani	27-Mar-2020	DSM,ICAM,STL
James The DSR	Microsoft Pvt Ltd	23-Apr-2020	DSM,ICAM
James The DSR	Naveen	06-Dec-2019	DSM,ICAM
James The DSR	Naveen Inc	09-Mar-2020	ICAM

## 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.

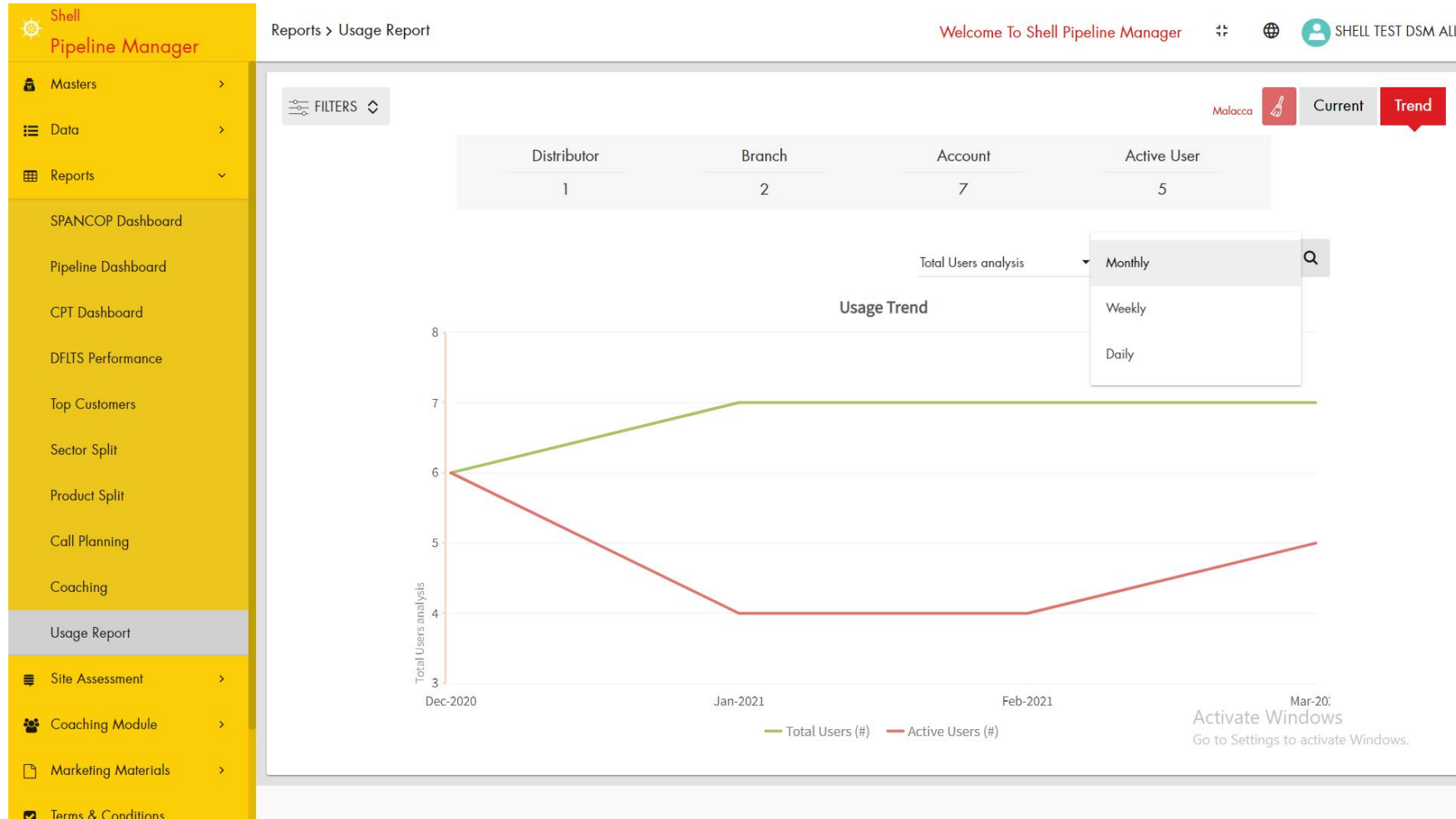
# Masters : Usage Report - Current



## 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

# Reports : Usage Report - Trend

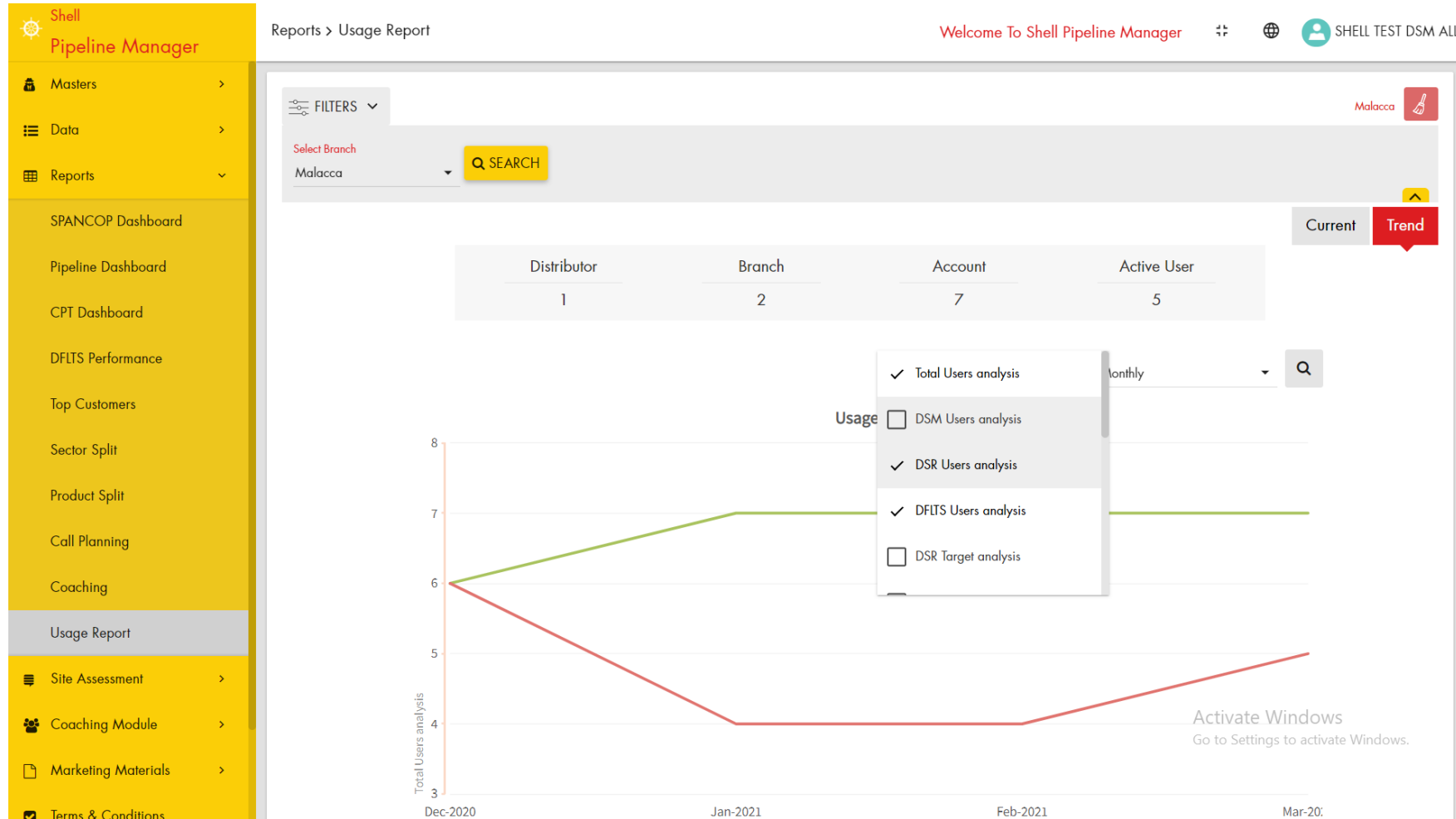


## Notes:

- 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.



# Reports: Usage Report - Trend



## Notes:

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

# Site Assessment - Site Assessment Report

Shell Pipeline Manager

Site Assessment > Site Assessment Report

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

FILTERS

CLEAR FILTERS

Branch: All | Select Sector: All | From Date: | To Date: | SEARCH

Creation Date	Customer Name	Customer Sector	Customer Sub Sector	Distributor Name	DSR Name	Download
08-Dec-2019	one	Construction		Shell Test Distributor A	Ian The DFITS	Download
09-Dec-2019	Testforweb	Agriculture		Shell Test Distributor A	Ian The DFITS	Download
09-Dec-2019	Ding Bin	Cement		Shell Test Distributor A	Ian The DFITS	Download
09-Dec-2019	Ding Bin	Cement		Shell Test Distributor A	Ian The DFITS	Download
09-Dec-2019	Testforweb	Agriculture		Shell Test Distributor A	Ian The DFITS	Download
09-Dec-2019	Ding Bin	Cement		Shell Test Distributor A	Ian The DFITS	Download
10-Jan-2020	Shiva	Agriculture		Shell Test Distributor A	Ian The DFITS	Download
24-Feb-2020	Dflt	Construction		Shell Test Distributor A	Ian The DFITS	Download

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## 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.

# Marketing Materials : Download Materials

Shell Pipeline Manager

Marketing Materials > Download Materials

Welcome To Shell Pipeline Manager

DEMO DSM GOLDEN

About 23 result found

<b>New</b>	Power General Manufacturing	PDF	<b>New</b>	Test Power	PDF	<b>New</b>	Testing Franchised Workshop Fleet	PPTX
<b>New</b>	Test pdf v B2C Other	PDF	<b>New</b>	Testing MM General Manufacturing	XLSX	<b>New</b>	Corena Material Corena General Manufacturing Compressor Shell Corena S4 P Shell Gadus S2 High Speed Coupling	PPTX
<b>New</b>	Play Edit Reseller - Transport Agriculture Chemicals	MP4	<b>New</b>	Upload Branded Workshop Agriculture Chemicals Independent Workshop	PPTX	<b>New</b>	Professional Propelling system - walking cam	XLS
<b>New</b>	Test05 Textile	XLSX	<b>New</b>	Demo Metal	PDF	<b>New</b>	B2B edit B2B Other Propelling system - walking cam	PPT

Activate Windows  
Go to Settings to activate Windows.

## 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

Shell Pipeline Manager

How to Use

Welcome To Shell Pipeline Manager

SHELL TEST DSM ALL

### Manuals

#### Quick Start

DSM	PDF
DSR	PDF
DFITS	PDF

#### Mobile

DSR	PDF
DFITS	PDF

### Videos

#### Mobile

- 1.Introduction to Pipeline Manager
- 2.Guidelines to use Pipeline Manager
- 3.Creating a New Opportunity
- 4.Adding Additional Information to Opportunity
- 5.Reviewing and Editing Opportunities
- 6.Call Plan Creation and Reporting
- 7.Marketing Materials Usage
- 8.Coaching Modules
- 9.Creating Site Assessment Report
- 10.Customer Actual Sales Performance
- 11.DFLTS Functionalities
- 12.B2C functionalities : Promos, Merchandizing and Order Taking
- 13.My performance : Reports and Improvements
- 14.D-OEM Functionalities
- 15.Pipeline Manager Tool for Shell Users Web
- 16.Pipeline Manager Tool for DSM Web

Activate Windows  
Go to Settings to activate Windows.

## 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.

# Help

The screenshot displays the Shell Pipeline Manager interface. The top navigation bar includes the Shell Pipeline Manager logo, the text 'How to Use', and a user profile 'SHELL TEST DSM ALL'. The main content area is divided into 'Manuals' and 'Videos' sections. A 'Help' pop-up window is overlaid on the interface, featuring a yellow header with the word 'Help' and a close button. The form contains three mandatory fields: 'Email \*' with the value 'dsm\_all@shell.com', 'Request Type \*' with a dropdown arrow, and 'Remarks \*' with a text area. A 'SUBMIT' button is located at the bottom of the form.

## 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.

