



# CRI GLOBAL SFA

PORTAL V. 1.0.12

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# CRI GLOBAL SFA

CRI GLOBAL SFA app is used by the CRI Employees to communicate on the go. App is available in 2 formats.

1. Desktop Version (USING BROWSER)
2. Mobile Version (APP FROM GOOGLE PLAY STORE)

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## Desktop Version (USING BROWSER)

URL : <https://intlsfa.crifluidsystems.com:85/>

CREDENTIALS : same as citrix login

# MODULES

- 1. LOGIN
- 2. DAR
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    - 2.1.1 DEALER CALL REPORT
    - 2.1.2 RETAILER CALL REPORT (SUBDEALER CALL)
    - 2.1.3 DEALER SERVICE CALL REPORT
    - 2.1.4 MARKET VISIT REPORT
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    - 2.1.7 SALES CALL REPORT
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- 11.4 DEPARTMENT MASTER
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## 1. LOGIN:

First we need to login Export SFA. Enter the username and password on the screen and Click to Login.



C.R.L. PUMPS  
PLEASE SIGN IN

USER NAME  
|

PASSWORD  
Password

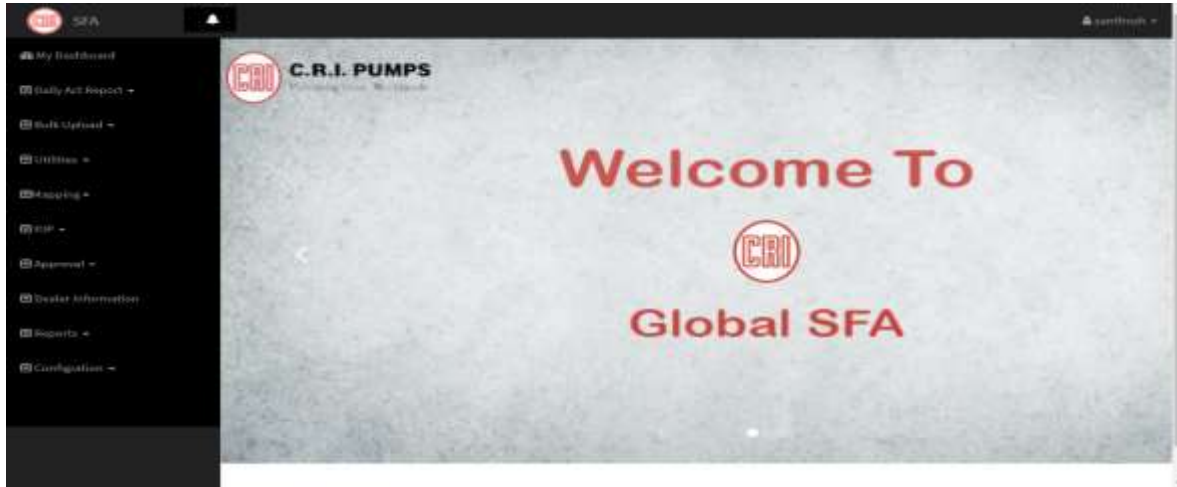
Remember me

LOGIN

Figure 1.0 Login page

## HOME PAGE:

Upon login HOME screen will be opened as default.



Displaying the available menus.

Figure 1.2 SFA Login Page

## **2. DAILY ACT REPORT (DAR):**

Consists of 7 reports. On the field based on the report type the required results can be filled.

### **2.1.1. DEALER CALL REPORT**

### **2.1.2. RETAILER CALL REPORT (SUBDEALER CALL)**

### **2.1.3. DEALER SERVICE CALL REPORT**

### **2.1.4. MARKET VISIT REPORT**

### **2.1.5. MEDIATOR CALL REPORT**

### **2.1.6. TRAINING REPORT**

### **2.1.7. SALES CALL REPORT**

To make a DAR two options are available.

#### **2.1 OPEN DAR**

#### **2.2 DAR BY PUNCH**

## 2.1 OPEN DAR:

Use this option by default to enter a DAILY ACTIVITY REPORT by selecting the required REPORT.

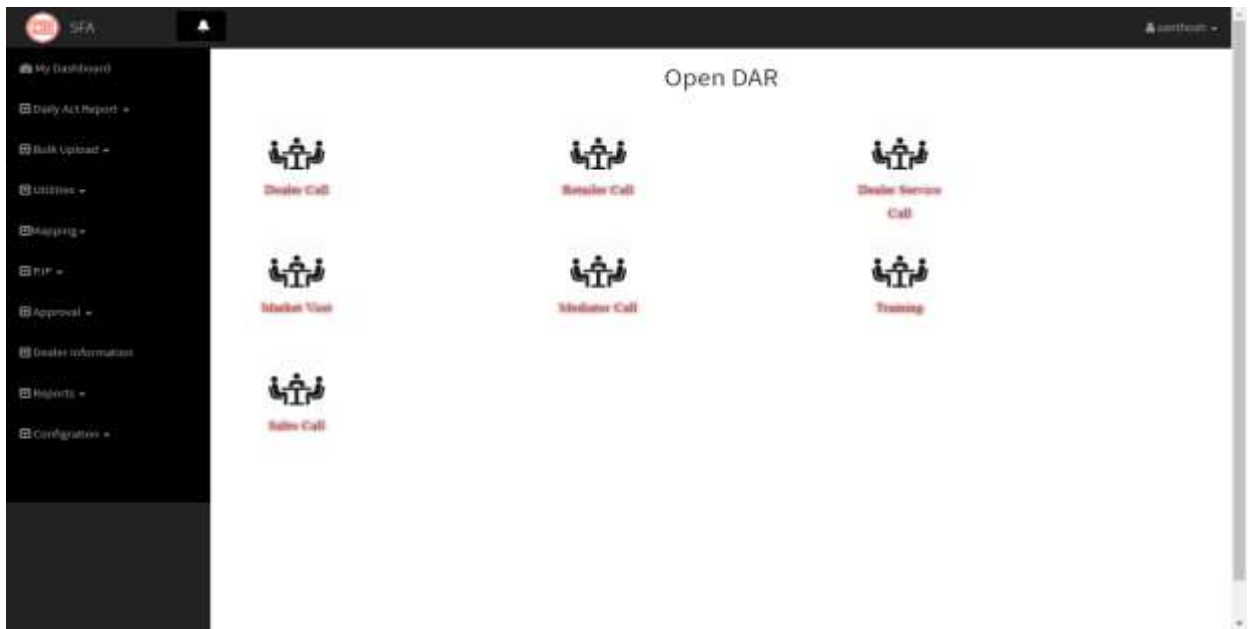


Figure 1.3 Open DAR Window

### 2.1.1 Dealer Call:

In open DAR window you can select the “**Dealer Call**” icon on your Screen.

You can select a dealer and fill the required data on the dealer call window and submit the report.



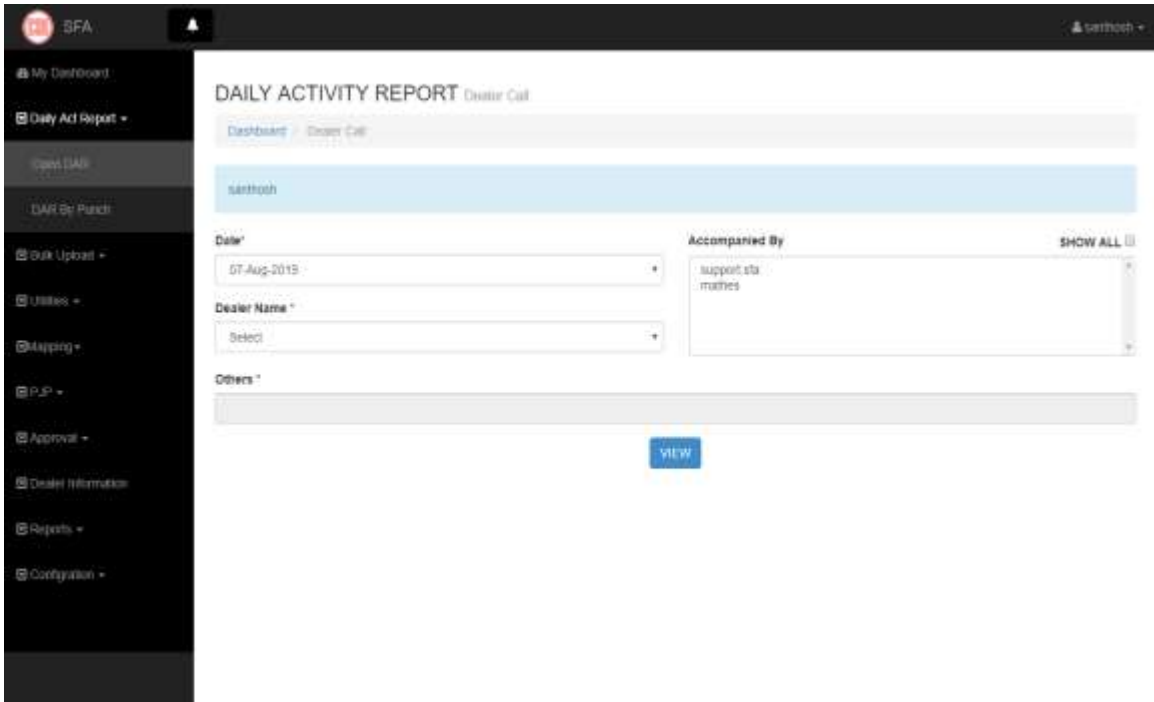


Figure 1.4 Dealer Call

### 2.1.2 Retailer Call:

In open DAR window you can select the “**Retailer Call**” icon on your Screen.

You can select a Retailer and fill the required data on the dealer call window and submit the report.

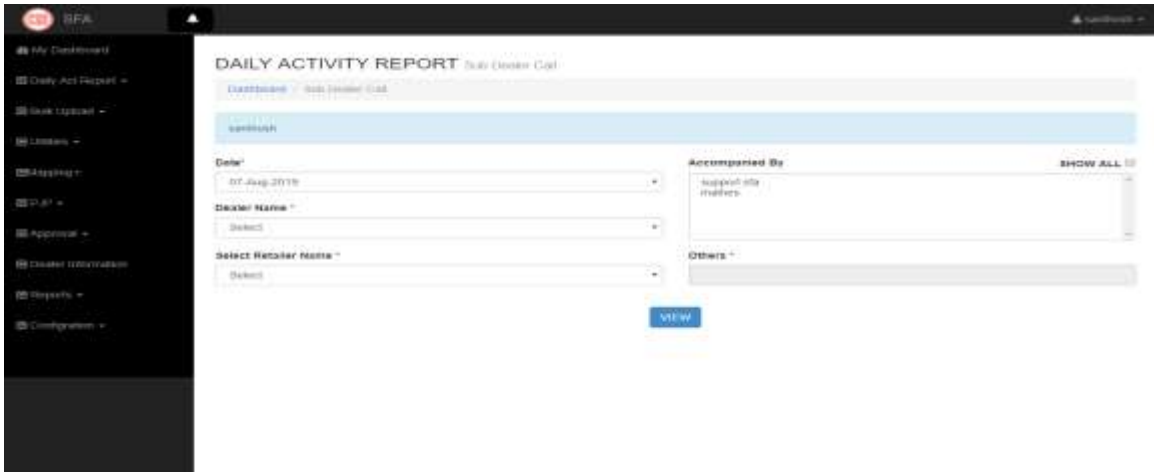


Figure 1.5 Sub Dealer Call

### 2.1.3 Dealer Service Call:

In open DAR window you can select the “**Dealer Service Call**” icon on your Screen.

You can select a Service center / Dealer and fill the required data on the dealer call window and submit the report.

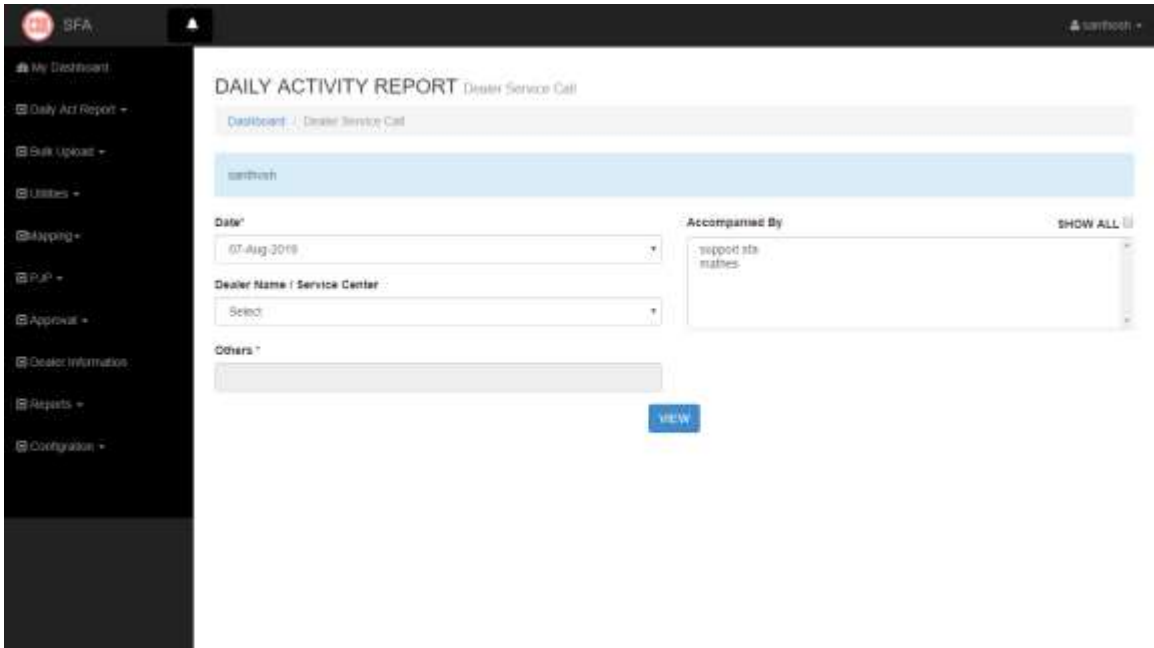


Figure 1.6 Dealer Service Call

## 2.1.4 Market Visit:

In open DAR window you can select the “Market Visit Call” icon on your Screen.

You can select a required MARKET (BRANCH/DISTRICT/BUSINESS CENTER/SUB CENTER) and fill the required data on the market visit call window and submit the report.

The screenshot shows the 'MARKET VISIT REPORT' form in the SFA application. The form is titled 'MARKET VISIT REPORT' and has a breadcrumb trail 'Dashboard > Market Visit'. The form is divided into several sections:

- Location:** A dropdown menu for 'Market' with 'sandhoon' selected.
- Date:** A date picker showing '07-Aug-2018'.
- Branch, District, Business Centre, and Sub-Centre:** Four dropdown menus for selecting the location details.
- Accompanied By:** A list box containing 'support sfa' and 'mathan', with a 'SHOW ALL' link.
- Purpose of the Visit:** A text input field.
- Details of Persons or Shop Met:** A section header with a plus icon, followed by a table with columns: 'Name of the Person / Shop Met', 'Mobile No', 'Call Classification', and 'Comments'.

This screenshot shows the lower portion of the 'MARKET VISIT REPORT' form. The sections visible are:

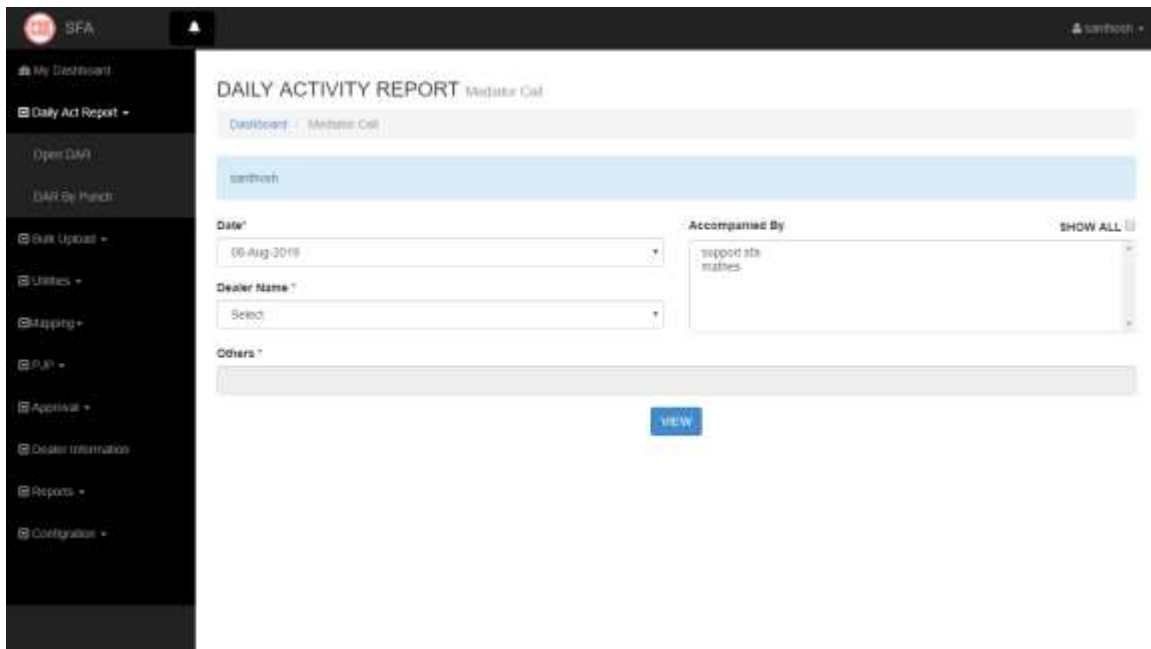
- Outcome of the Visit:** A text input field.
- Report Attachments (if Any):** A file upload area with a 'Choose File' button and a 'File(s) to Upload' label.
- Time In:** A time picker showing '4:00 PM'.
- Time Out:** A time picker showing '4:30 PM'.
- Submit:** A blue button labeled 'Submit'.

## Figure 1.7 Market Visit

### 2.1.5 Mediator Call:

In open DAR window you can select the **“Mediator Call”** icon on your Screen.

You can select a required Mediator and fill the required data on the mediator visit call window and submit the report.



The screenshot displays the SFA (Sales Force Automation) interface. On the left is a dark sidebar with navigation options: My Dashboard, Daily Act Report (selected), Open DAR, DAR By: Patch, Bulk Upload, Utilities, Shipping, P.M., Approval, Dealer Information, Reports, and Configuration. The main content area is titled 'DAILY ACTIVITY REPORT Mediator Call'. Below the title is a breadcrumb 'Dashboard > Mediator Call' and a 'refresh' button. The form contains the following fields: 'Date' with a dropdown menu showing '06 Aug 2018'; 'Dealer Name' with a dropdown menu showing 'Select'; 'Accompanied By' with a text input field containing 'support sta mates' and a 'SHOW ALL' link; and 'Others' with a large empty text area. A blue 'VIEW' button is positioned below the form.

Figure 1.8 Mediator Call

### 2.1.6 Training:

In open DAR window you can select the **“Training Call”** icon on your Screen.

You can select a required Training details and fill the required data on the training call window and submit the report.

**SFA** | My Dashboard | Daily Act Report | Open DAR | DAR By Patch | Bulk Upload | Utilities | Mapping | PJP | Approval | Dealer Information | Reports | Configuration

### TRAINING REPORT

Dashboard > TRAINING

url/track

Date\*  
06-Aug-2018

Training / Seminar / Conference / Exhibition Visited Report

Date: [mm/dd/yyyy] | Venue: [ ] | Title: [ ] | Trainer / Speakers / Other information: [ ]

Accompanied By: [support-sta, malina, OTHERS] [SHOW ALL]

Summary About the Training / Seminar / Exhibition: [ ]

Learnings / Take Away Points: [ ]

Learnings / Take Away Points: [ ]

Actions Points or Recommended Comments for our Business Practice: [ ]

| Factor Rating                                    | Factor Rating  |
|--|--|
| Training was relevant to my needs<br>[Select]    | Satisfaction on the Trainer<br>[Select]                      |
| Materials Provided were much helpful<br>[Select] | Training Atmosphere and Organising Effectiveness<br>[Select] |
| Length of training was sufficient<br>[Select]    | Overall Effectiveness of the Training<br>[Select]            |

Presentations Attachments (if Any): [Choose File] No file chosen | Time In\*: [ ] | Time Out\*: [ ]

[SUBMIT]

Figure 1.9 Training

## 2.1.7 Sales Call:

In open DAR window you can select the “Sales Call” icon on your Screen.

You can select a required Customer and fill the required data on the sales call window and submit the report.

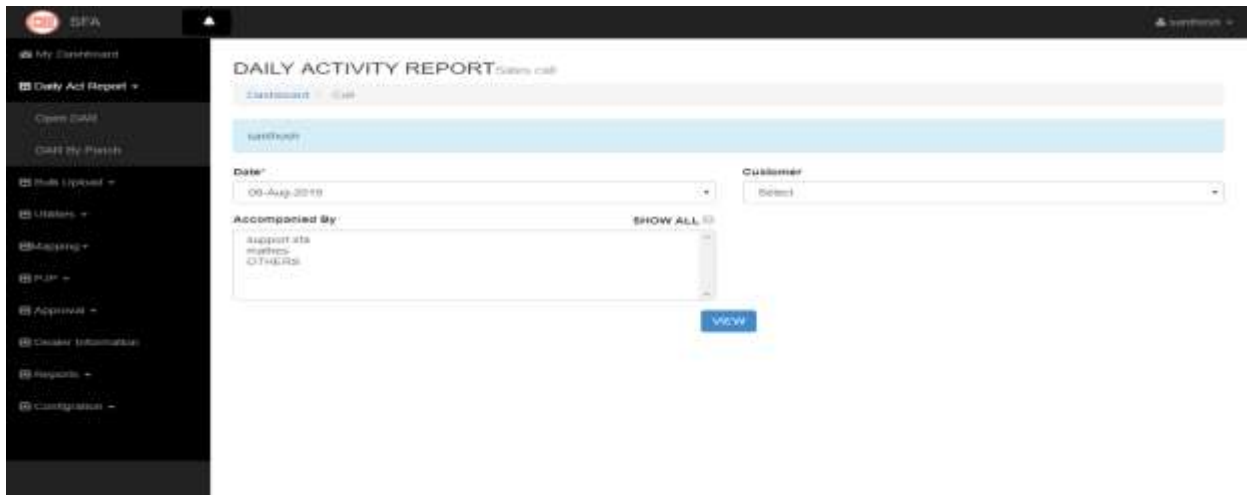


Figure 1.0.1 Sales Call

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## 2.2 DAR by Punch:

DAR by punch provides us the option to enter DAR based on out PUNCH Dates which are already done. On selecting dates based on the available CALL TYPE for the dates entries can be made.

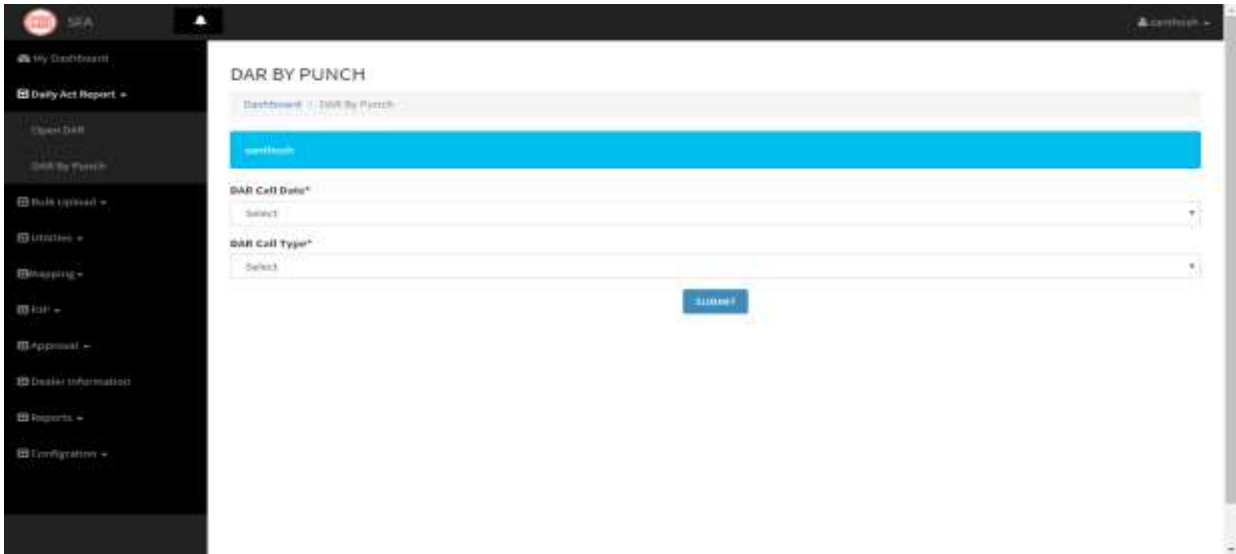


Figure 1.0.2 DAR by Punch

### **3. BULK UPLOAD:**

This menu can be used by admin to upload bulk data to the system this can be done via EXCEL Sheet. Upload's are available for

#### **3.1 Employee:**

#### **3.2 Dealer**

#### **3.3 Employee Dealer Mapping**

#### **3.4 Branch**

#### **3.5 Area**

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### **4. UTILITIES:**

UTILITIES provides 5 menus

#### **4.1 BRANCH STOCK**

#### **4.2 EXECUTIVE TARGET (View & Entry)**

## 4.3 DATA MATRIX

## 4.4 EXECUTIVE DEALER MAPPING

### 4.1 Branch Stocks:

This menu is used to view the branch stock on the go.

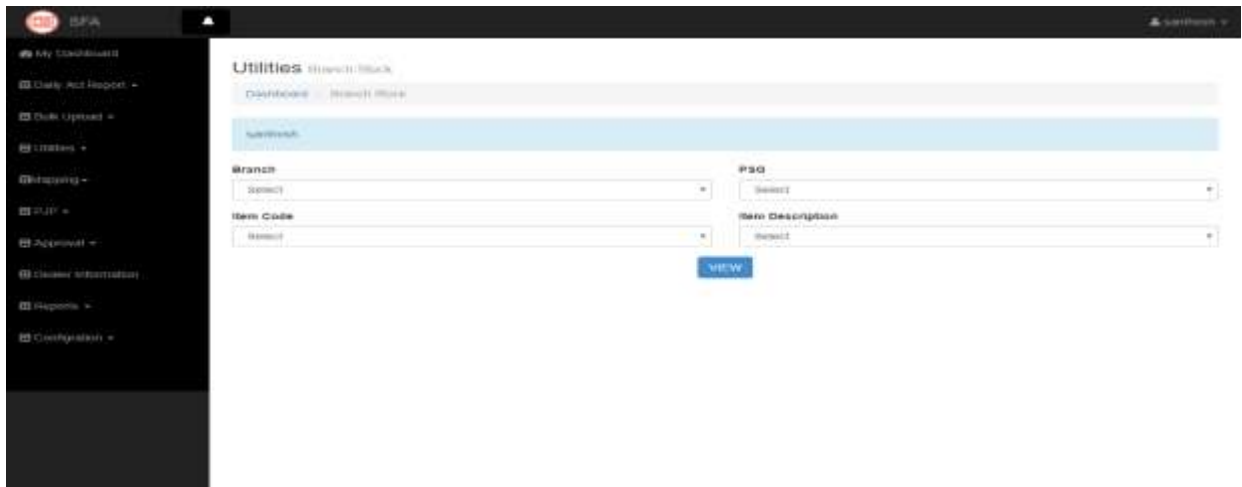


Figure 3.2 Branch Stock

### 4.2 Executive Target Entry:

Executives target can be entered using this menu.



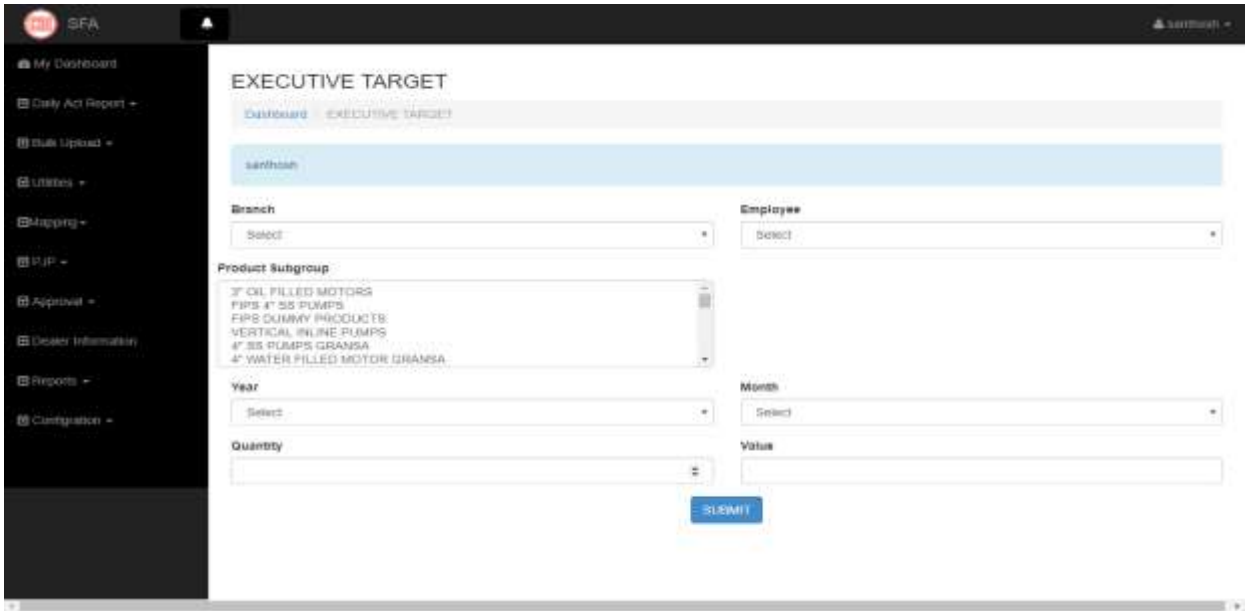


Figure 3.3 Executive Target

### 4.3 Targets:

Executive Targets can be viewed using this menu.

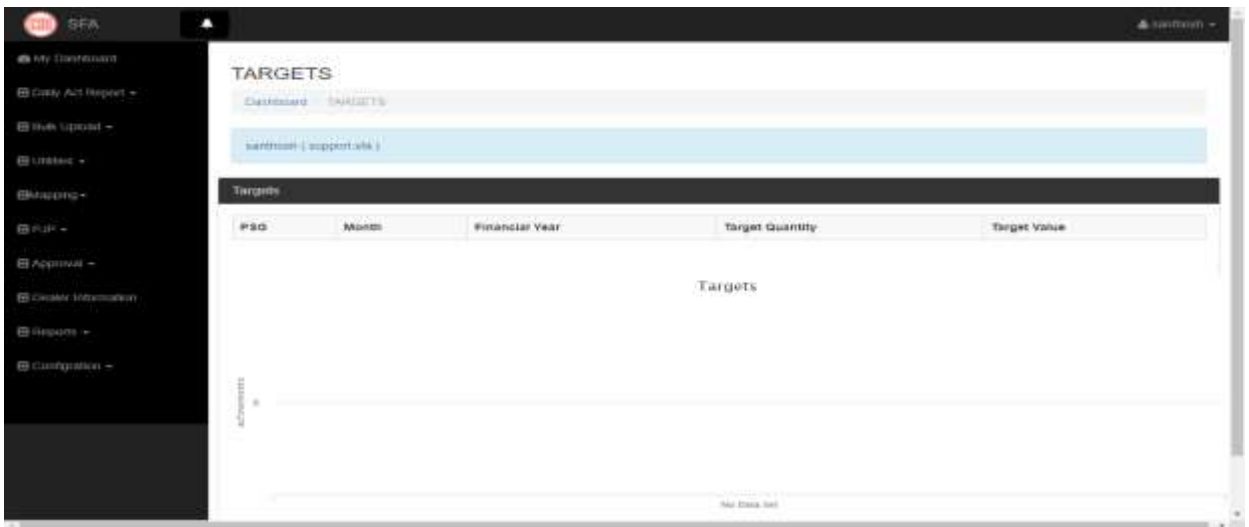


Figure 3.4 Targets

### 4.4 Data Matrix:

Data matrix is used to collect the competitors info on a particular area.

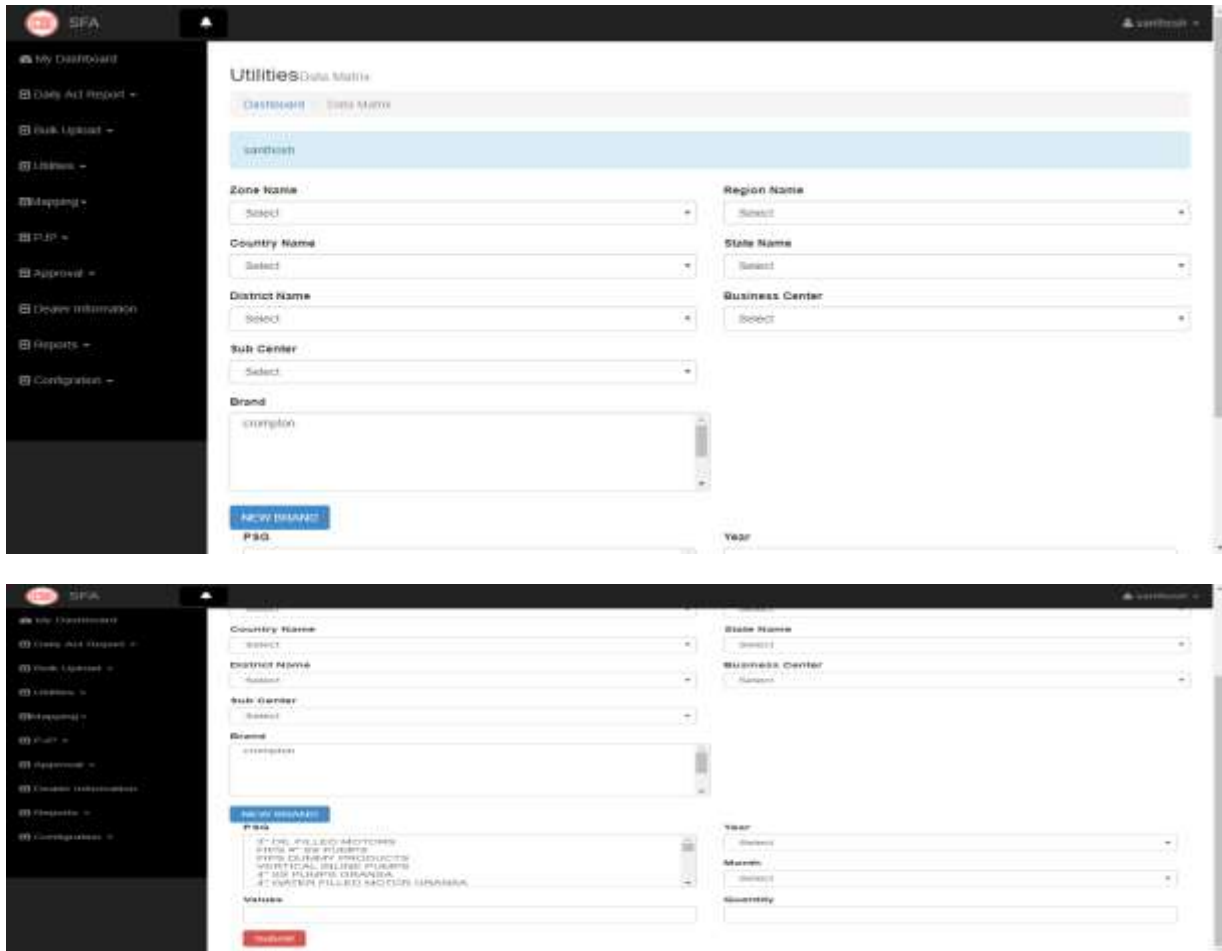


Figure 3.5 Data Matrix

#### 4.5 Employee Dealer Mapping:

This menu is used to map a dealer to the executive.

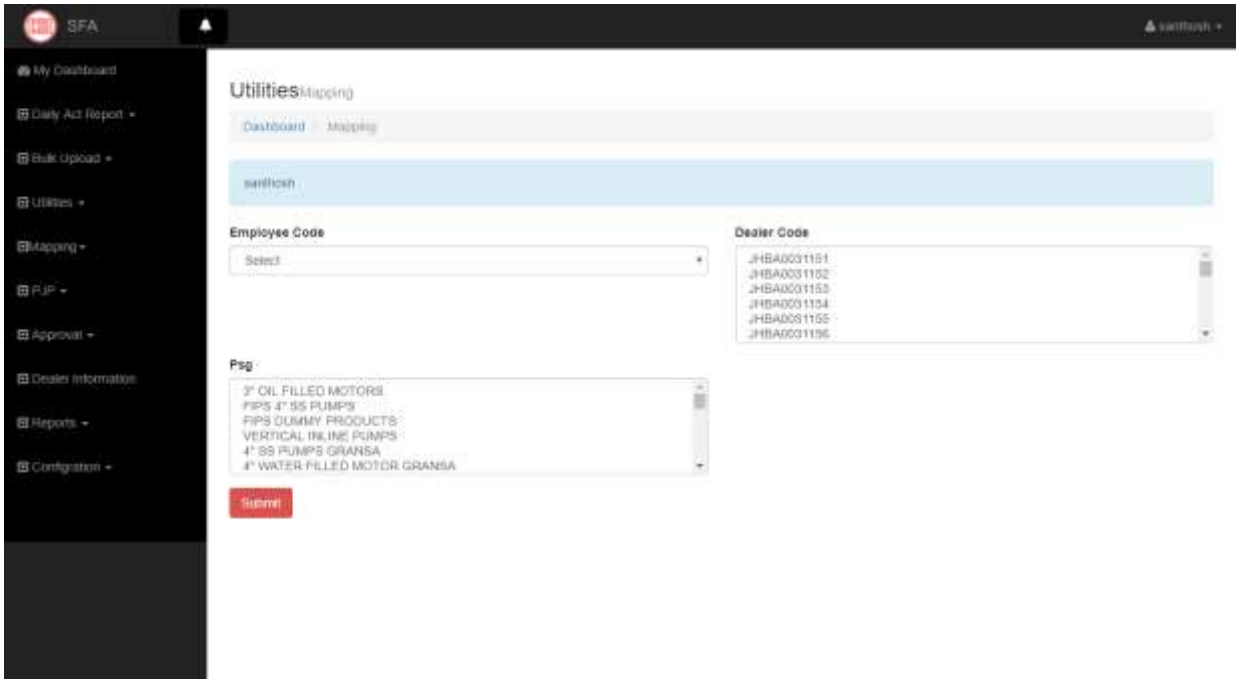


Figure 3.6 Mapping

## 5. MAPPING:

### 5.1 IMEI

#### 5.1 IMEI:

IMEI number of the employee can be viewed.

The screenshot displays the SFA (Sales Force Automation) interface for IMEI Mapping. On the left is a navigation menu with options like My Dashboard, Daily Ad Report, Bulk Upload, Utilities, Mapping, P.P, Approval, Dealer Information, Reports, and Configuration. The main content area shows the 'IMEI Mapping' form. It includes a dropdown for 'Employee Name / Code' (currently showing 'hari / hari') and a text input for 'IMEI'. A blue 'Save' button is positioned below the form. Below the form is a table titled 'IMEI Mapping List' with the following data:

| Branch | Employee Code | IMEI No           | Created Date            | Action |
|--------|---------------|-------------------|-------------------------|--------|
| ADM    | mathes        | 121323142354236   | 2019-07-31 11:07:08.213 | Delete |
| JHB    | hari          | 21211121315646199 | 2019-08-01 18:35:06.977 | Delete |

Figure 4.1 IMEI

## 6. TASK

Tasks or activities can be assigned and viewed using this menu.

The screenshot shows a web application interface with a dark sidebar on the left containing navigation options like 'Home Dashboard', 'Users and Groups', 'Reports', 'Tasks', 'Reports', 'Users Information', and 'Reports'. The main content area is titled 'Task Management' and features a table with the following data:

| Task     | Task Description              | Assigned By | Assigned Date          | Status | Action |
|----------|-------------------------------|-------------|------------------------|--------|--------|
| complete | find out info of the computer | malles      | 2018.08.08 07:04:42 AM | 0      | View   |

Figure 5.1 TASK

## 7. Pre Journey Plan:

This menu is used to create a PRE JOURNEY PLAN by the executive. 2 Menus are available to create a PJP and view a PJP.

7.1 Submit

7.2 Report

### 7.1 Submit:

Users can select a date and enter their call type against the dates.

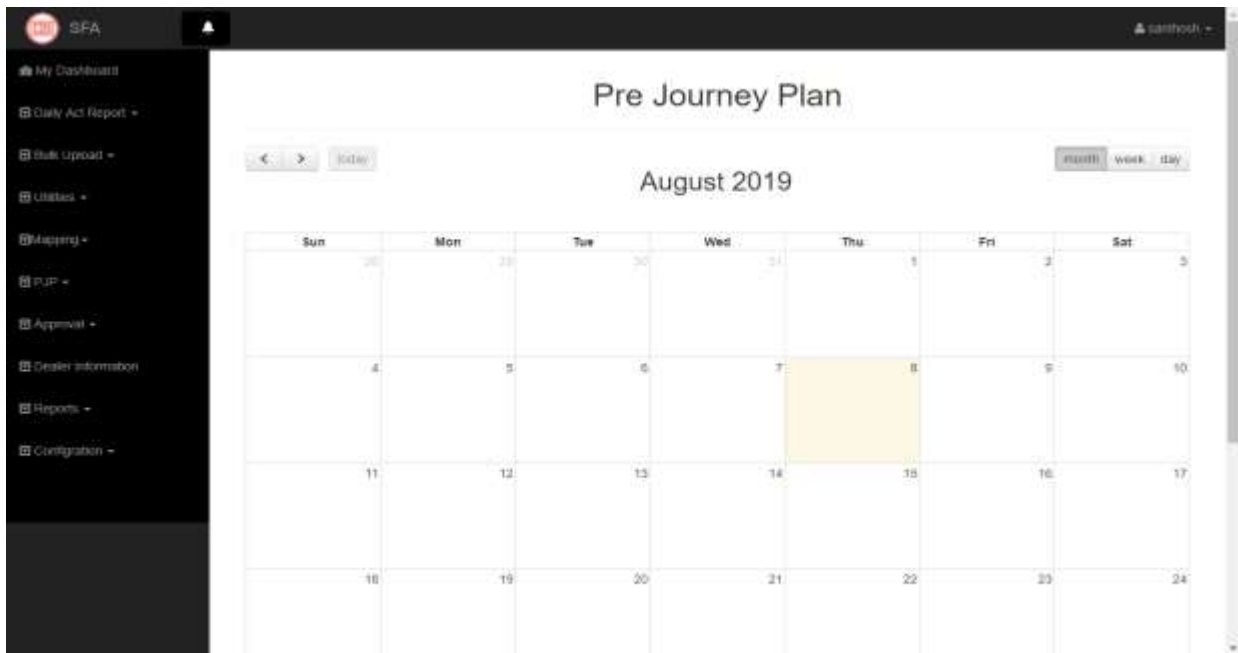


Figure 6.1 Pre Journey Plan

### 7.2 Report:

Users can view the entered reports.

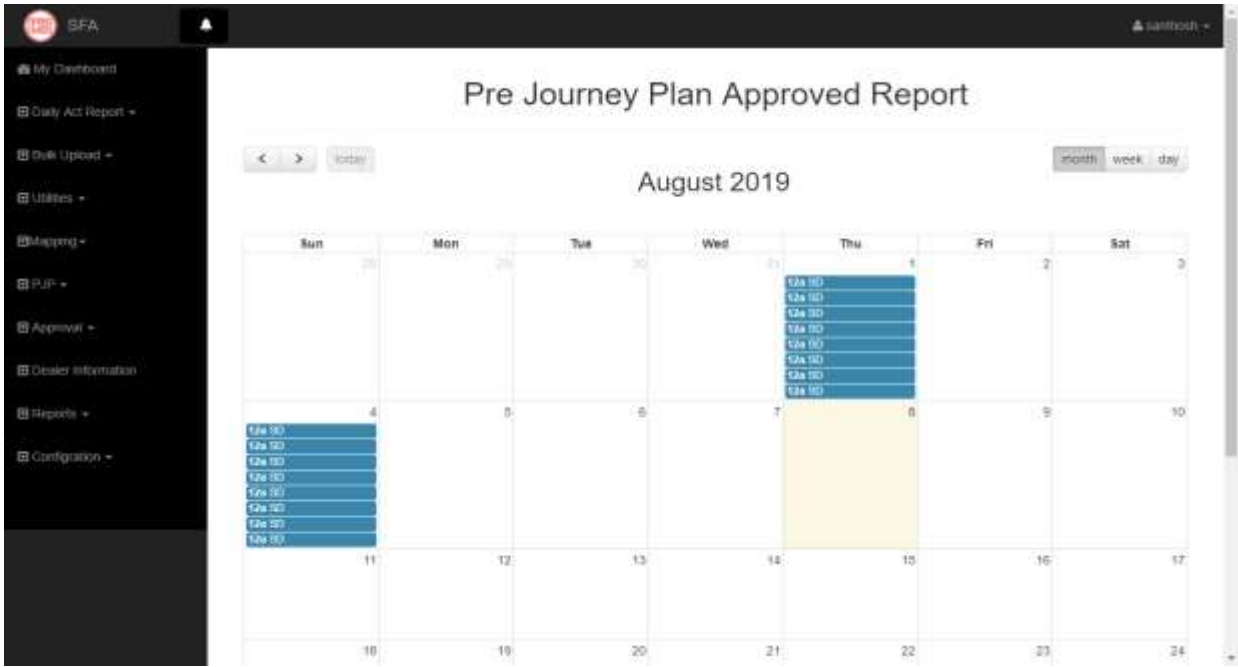


Figure 6.2 Report

## 8. Approval:

### 8.1 PJP APPROVAL

#### 8.1 PJP APPROVAL

In this menu can to used to approve the PJP of a reportee.

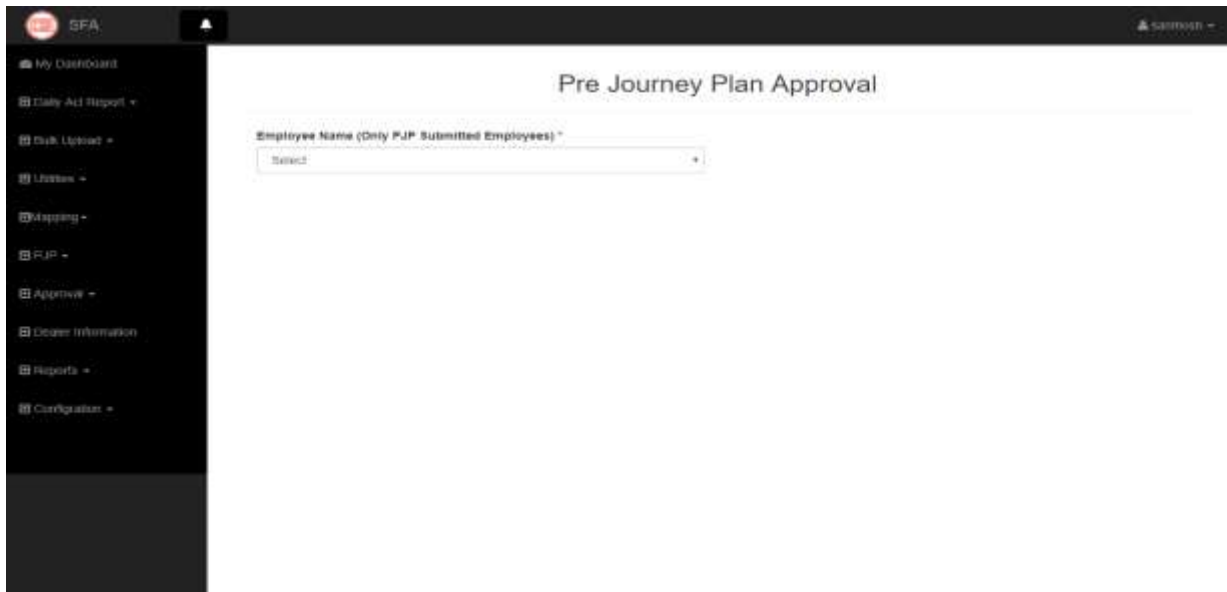


Figure 7.1 PJP APPROVAL SFA



## 9. DEALER INFORMATION

The dealer information can be viewed in this menu.

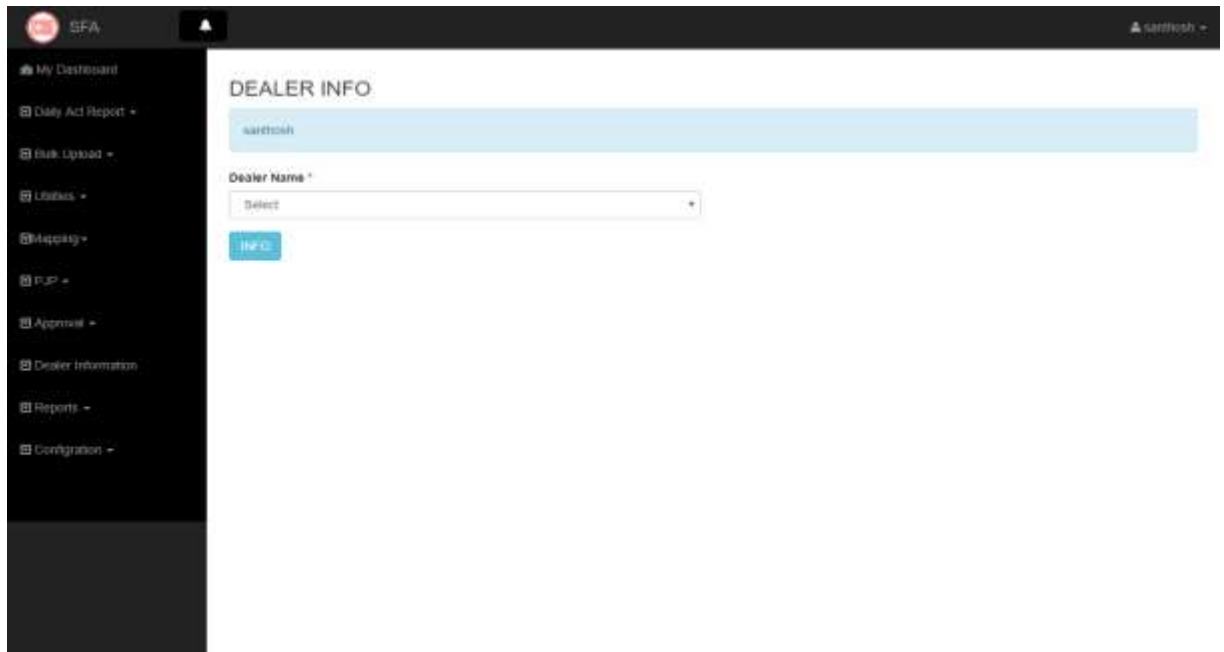


Figure 8.1 DEALER INFORMATION

## 10. REPORTS:

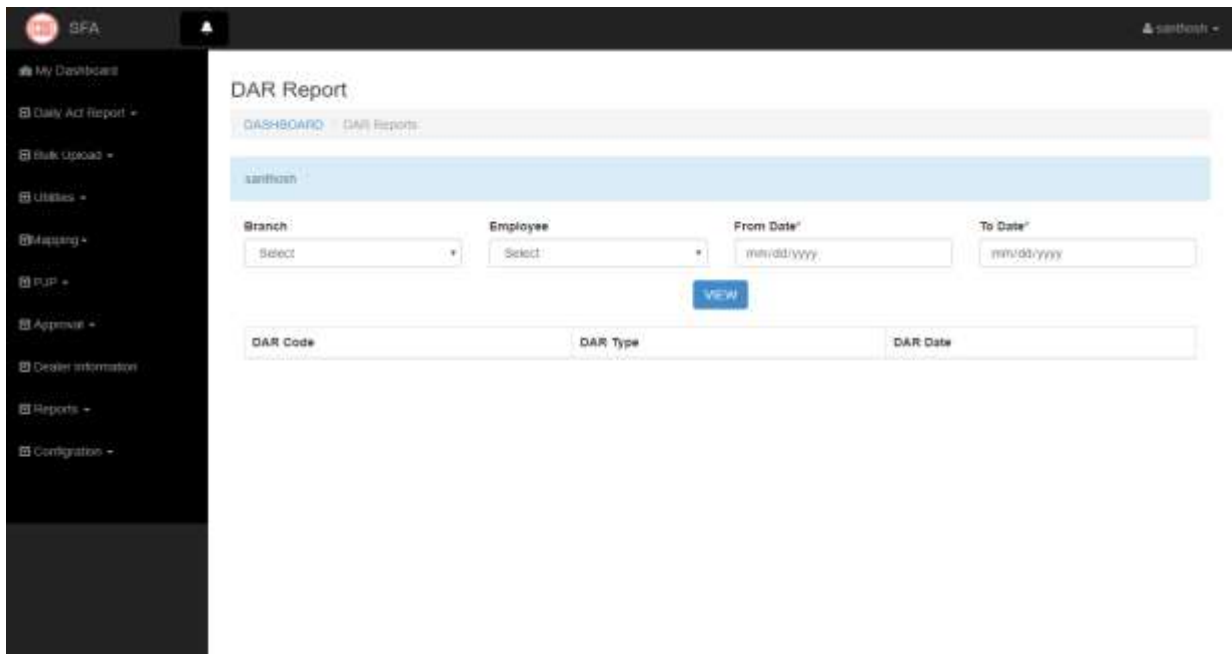
### 10.1 DAR REPORT

### 10.2 GPS REPORTS

### 10.3 TASK MANAGER REPORTS

## 10.1 DAR REPORT:

Daily activity report can be viewed in this menu.



The screenshot shows a web application interface for generating a Daily Activity Report (DAR). The interface includes a dark sidebar on the left with navigation options: My Dashboard, Daily Act Report, Bulk Upload, Utilities, Mapping, PUP, Approval, Dealer Information, Reports, and Configuration. The main content area is titled 'DAR Report' and features a breadcrumb trail 'DASHBOARD > DAR Reports'. Below this, there is a search bar with the text 'santhosh'. The form contains four input fields: 'Branch' (dropdown menu with 'Select'), 'Employee' (dropdown menu with 'Select'), 'From Date' (text input with placeholder 'mm/dd/yyyy'), and 'To Date' (text input with placeholder 'mm/dd/yyyy'). A blue 'VIEW' button is positioned below the date fields. At the bottom of the form, there is a table header with three columns: 'DAR Code', 'DAR Type', and 'DAR Date'.

Figure 9.1 DAR REPORT

## 10.2 GPS REPORTS:

GPS Reports can be viewed in this menu.

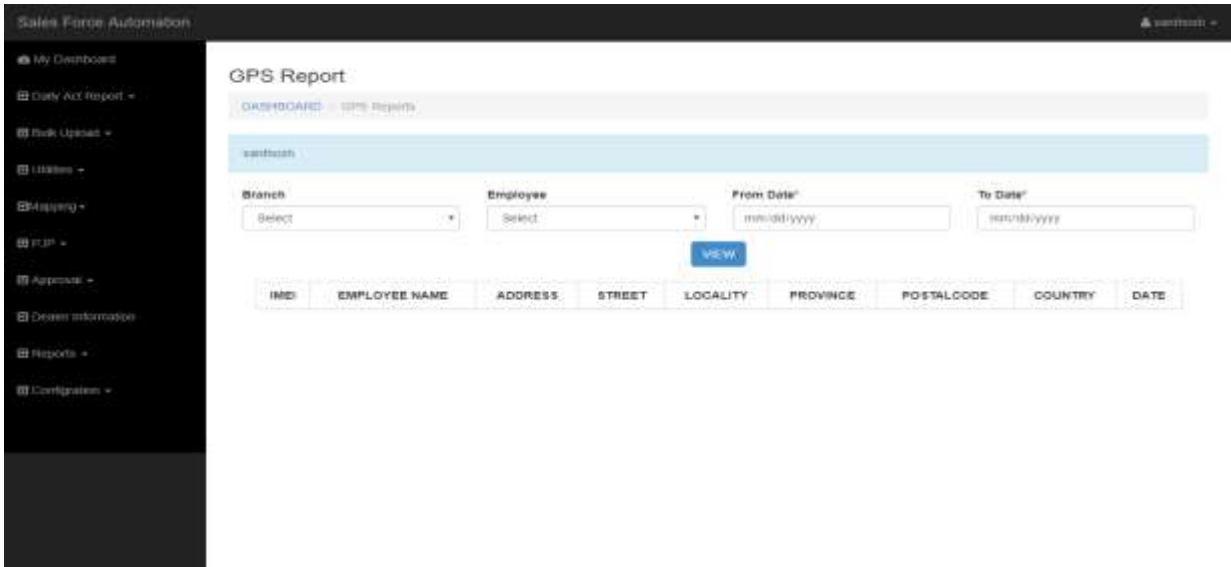


Figure 9.2 GPS REPORTS

### 10.3 TASK MANAGER REPORTS:

User can view the task Reports using this menu.

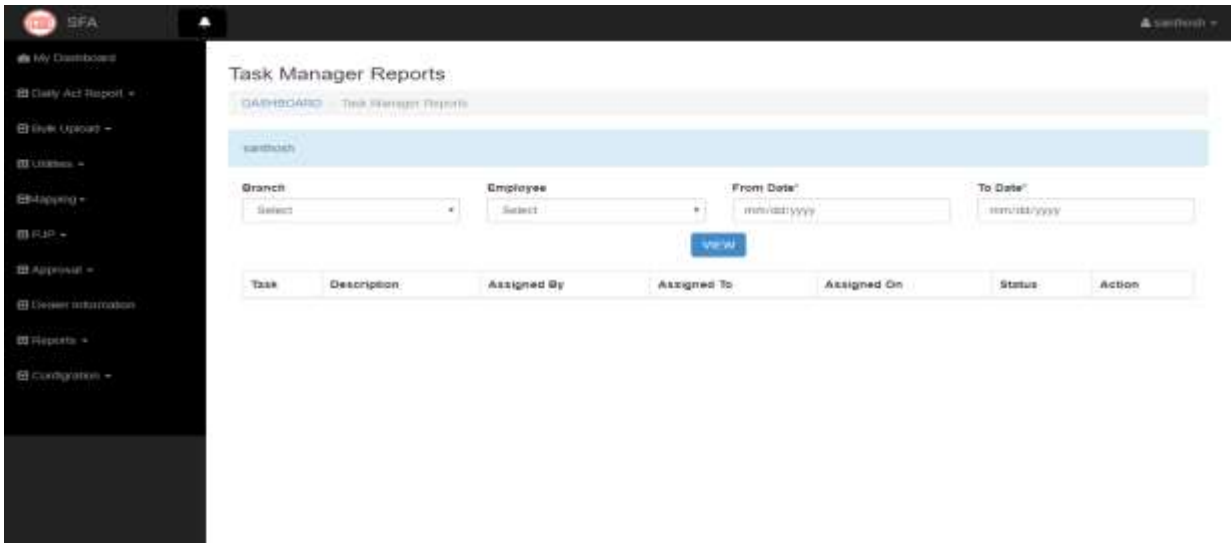


Figure 9.3 TASK REPORTS

## 11. CONFIGURATION:

11.1 DAR

11.2 BRANCH MANAGER

11.3 DESIGNATION MASTER

11.4 DEPARTMENT MASTER

11.5 EMPLOYEE MASTER

11.6 ASSIGN TASK

### 11.1 DAR:

This menu is used to set the date limits.

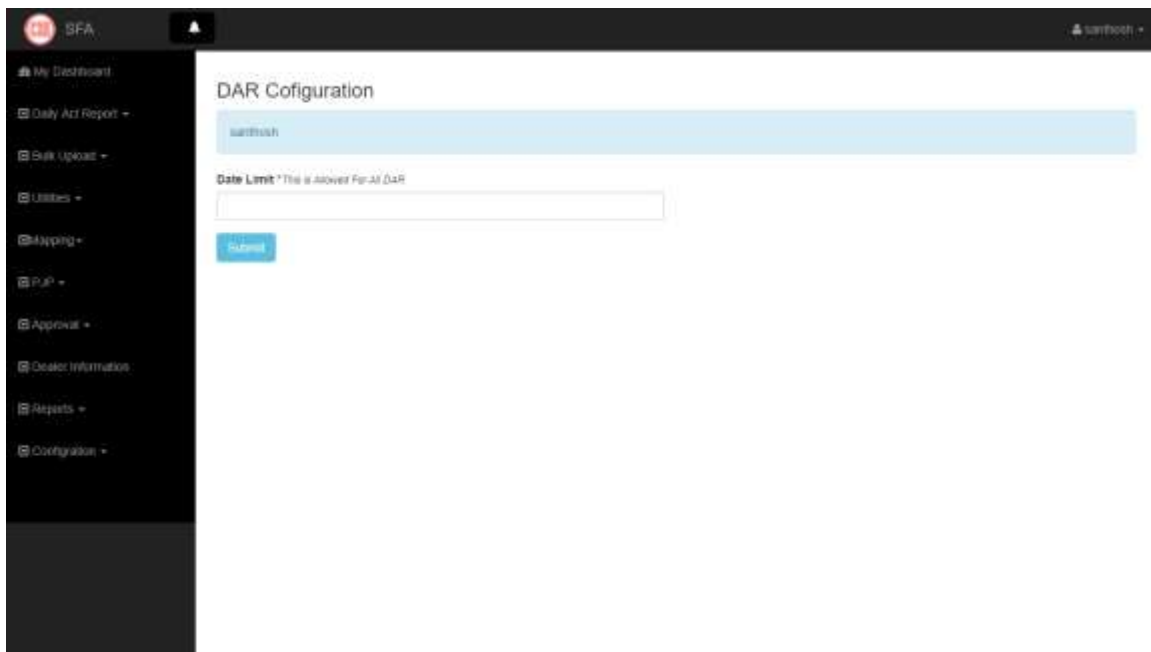
The image is a screenshot of a web application interface. At the top left, there is a logo with the letters 'SFA' and a small upward-pointing arrow. To the right of the logo, the text 'SFA' is visible. In the top right corner, there is a user profile icon and the text 'Logout'. On the left side, there is a dark sidebar with a list of menu items: 'My Dashboard', 'Daily Act Report', 'Bulk Upload', 'Utilities', 'Shipping', 'P.A.', 'Approval', 'Dealer Information', 'Reports', and 'Configuration'. The main content area is titled 'DAR Configuration'. Below the title, there is a light blue horizontal bar. Underneath that, there is a label 'Date Limit \* This is a limit for all DAR' followed by a text input field. At the bottom of the form, there is a blue 'Submit' button.

Figure 10.1 DAR

### 11.2 BRANCH MASTER:

A new Branch can be created using this menu.

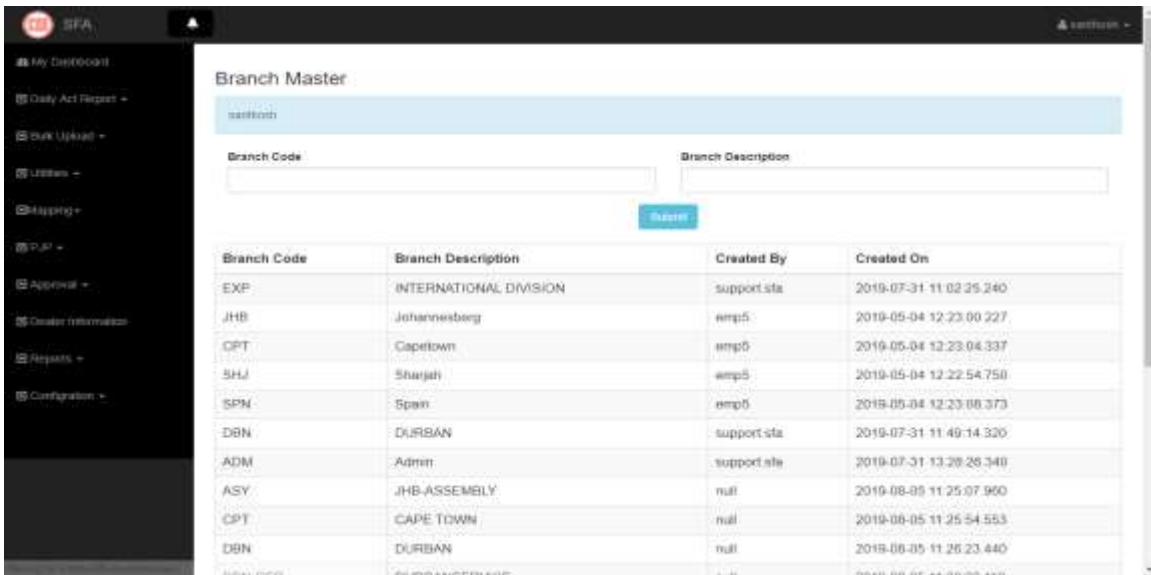


Figure 10.2 BRANCH MASTER

### 11.3 DESIGNATION MASTER

This menu can used to create new Designation.

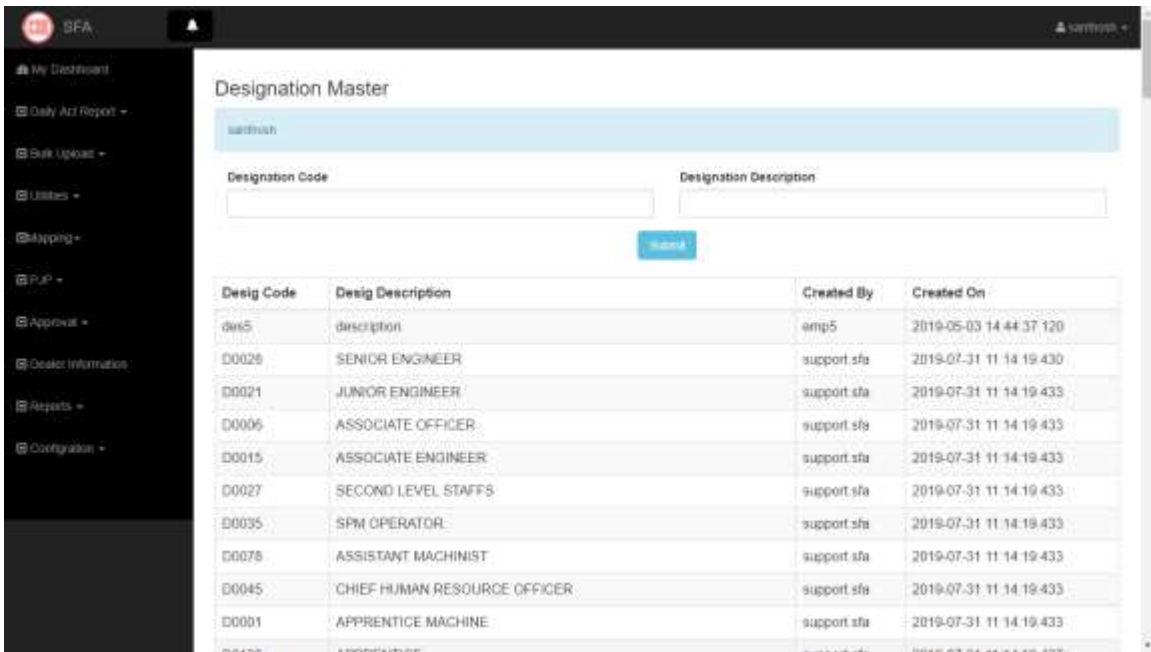
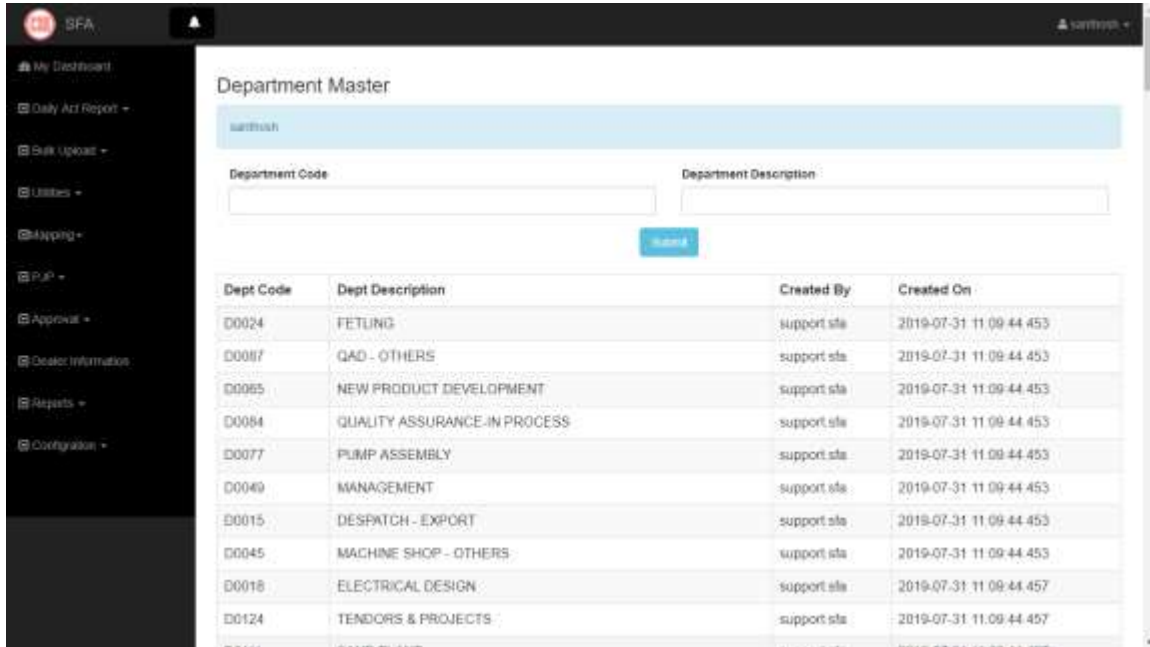


Figure 10.3 DESIGNATION MASTER

## 11.4 DEPARTMENT MASTER

This menu is used to create new Department.



| Dept Code | Dept Description             | Created By  | Created On              |
|-----------|------------------------------|-------------|-------------------------|
| D0024     | FETUNG                       | support sta | 2019-07-31 11:09:44.453 |
| D0087     | QAD - OTHERS                 | support sta | 2019-07-31 11:09:44.453 |
| D0065     | NEW PRODUCT DEVELOPMENT      | support sta | 2019-07-31 11:09:44.453 |
| D0084     | QUALITY ASSURANCE IN PROCESS | support sta | 2019-07-31 11:09:44.453 |
| D0077     | PUMP ASSEMBLY                | support sta | 2019-07-31 11:09:44.453 |
| D0049     | MANAGEMENT                   | support sta | 2019-07-31 11:09:44.453 |
| D0015     | DESPATCH - EXPORT            | support sta | 2019-07-31 11:09:44.453 |
| D0045     | MACHINE SHOP - OTHERS        | support sta | 2019-07-31 11:09:44.453 |
| D0018     | ELECTRICAL DESIGN            | support sta | 2019-07-31 11:09:44.457 |
| D0124     | TENDORS & PROJECTS           | support sta | 2019-07-31 11:09:44.457 |

Figure 10.4 DEPARTMENT MASTER

## 11.5 EMPLOYEE MASTER

A new Employee can be created using this menu.

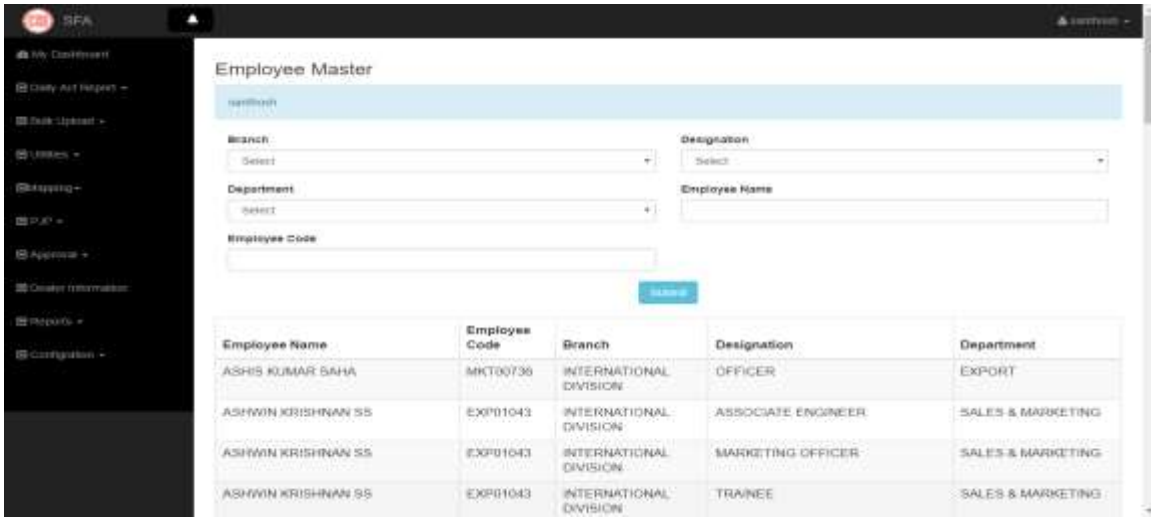


Figure 10.5 EMPLOYEE MASTER

## 11.6 ASSIGN TASK:

Task for the employee can be assign with this menu.

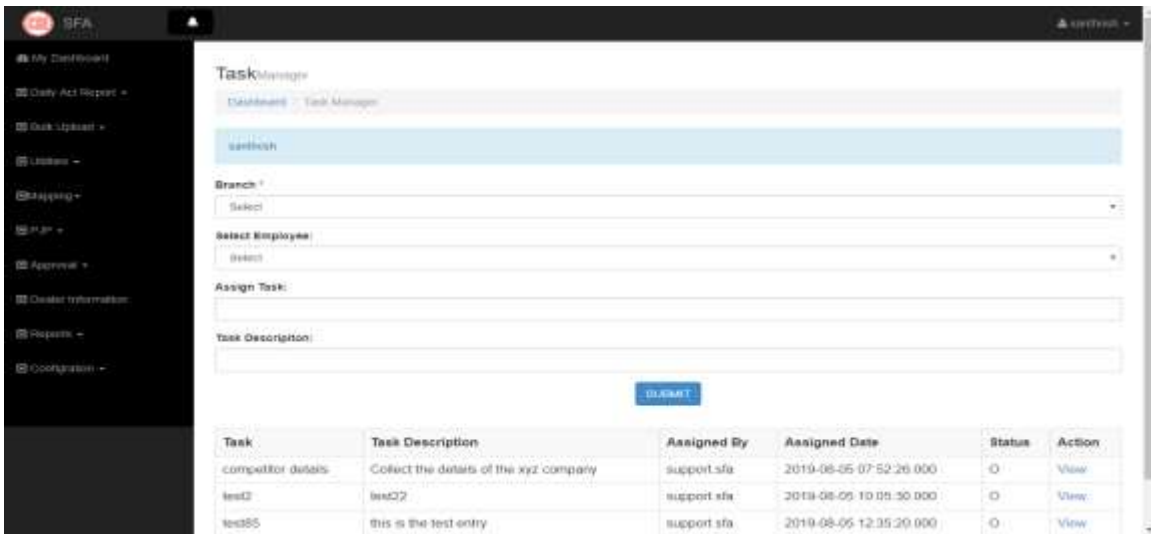


Figure 10.6 ASSIGN TASK

# THANK YOU

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*Contact us for clarification:*

*Phone: 0422-4384887*

*Email: [websolution@grsystems.co.in](mailto:websolution@grsystems.co.in)*