CRI GLOBAL SFA

PORTAL V. 1.0.12

Document by : GR SYSTEMS for CRI Pumps

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GR SYSTEMS

C.R.I. PUMPS
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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)

Desktop Version (USING BROWSER)

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

CREDENTIALS : same as citrix login

MODULES

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- 2. DAR
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        - ▪ 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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- 11.6 ASISGN TASK

1. LOGIN:

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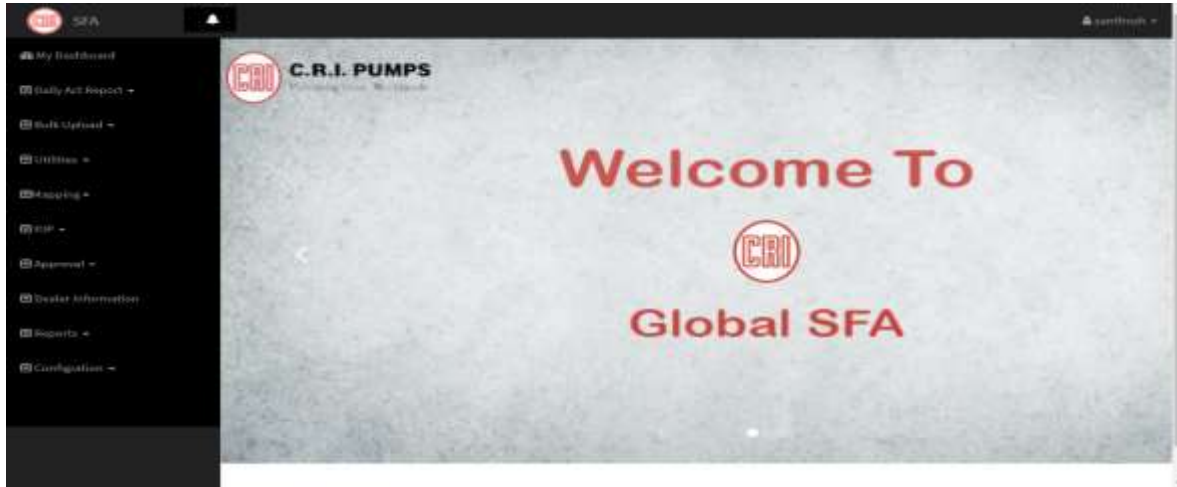

Figure 1.0 Login page

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.
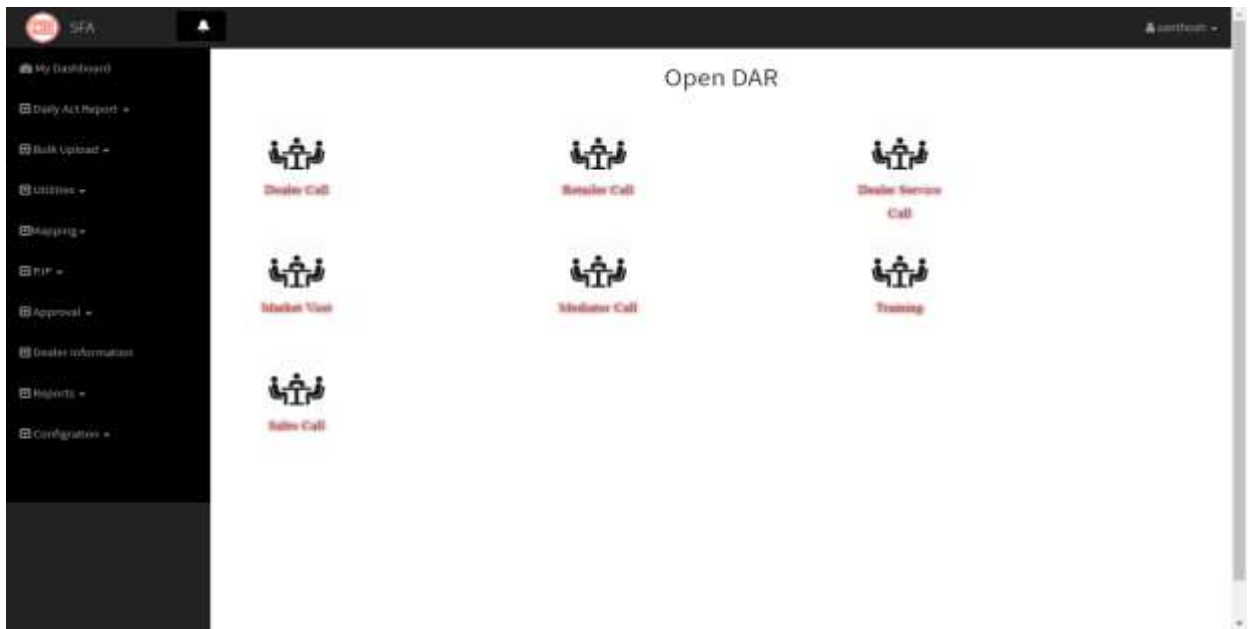
Figure 1.3 Open DAR Window

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.
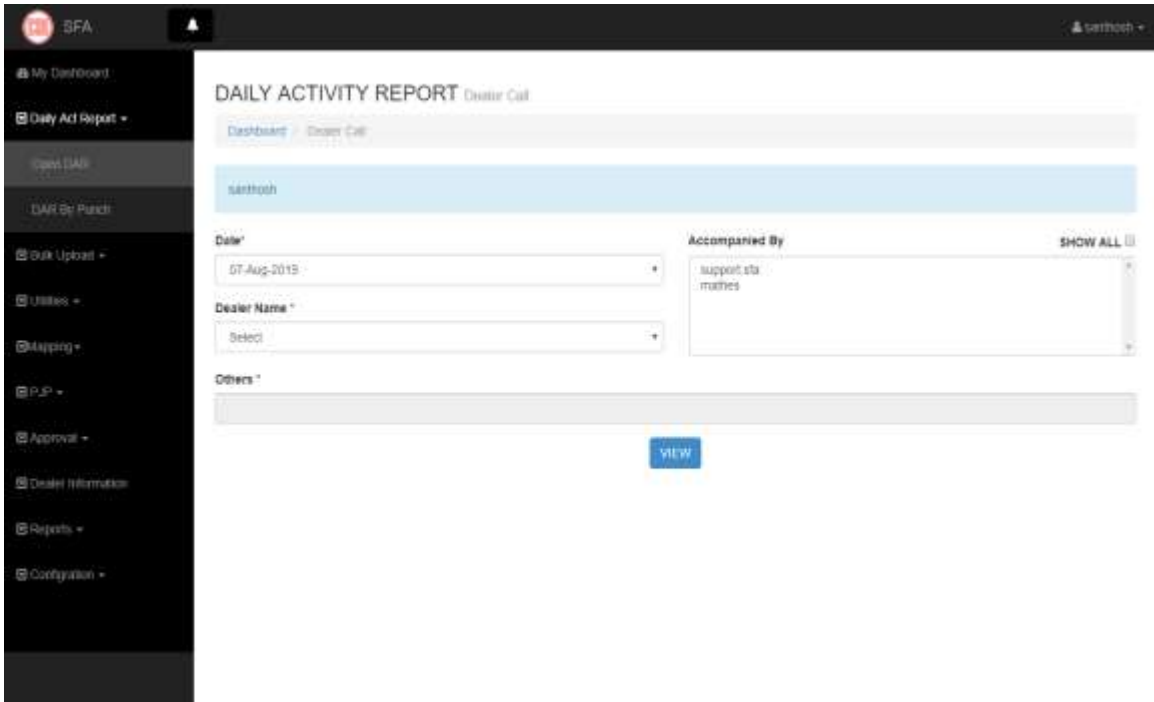
Figure 1.4 Dealer Call

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.
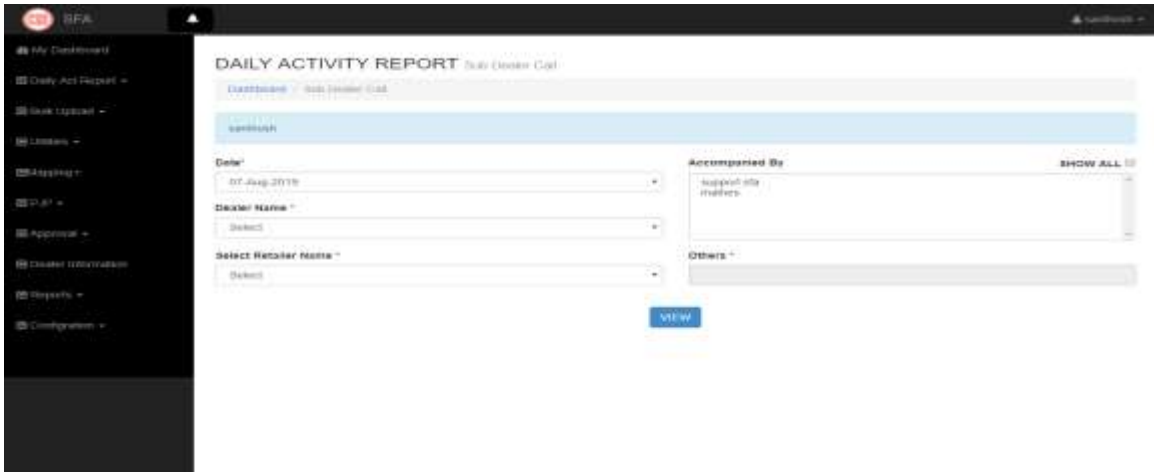
Figure 1.5 Sub Dealer Call

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.
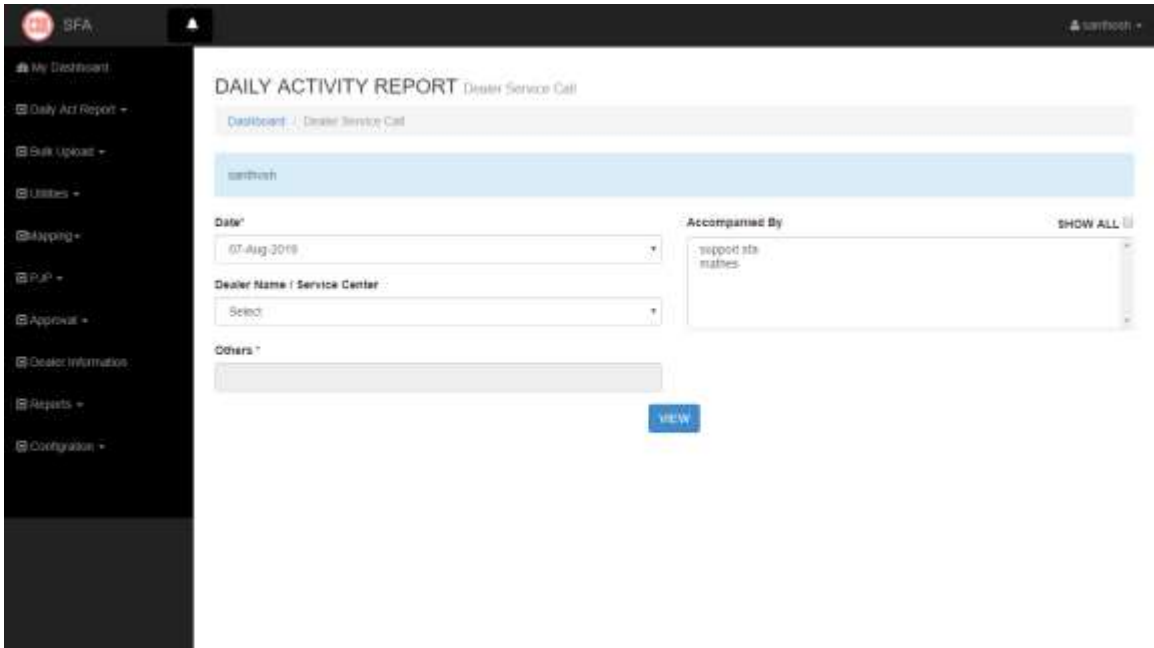
Figure 1.6 Dealer Service Call

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.

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.

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.

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.
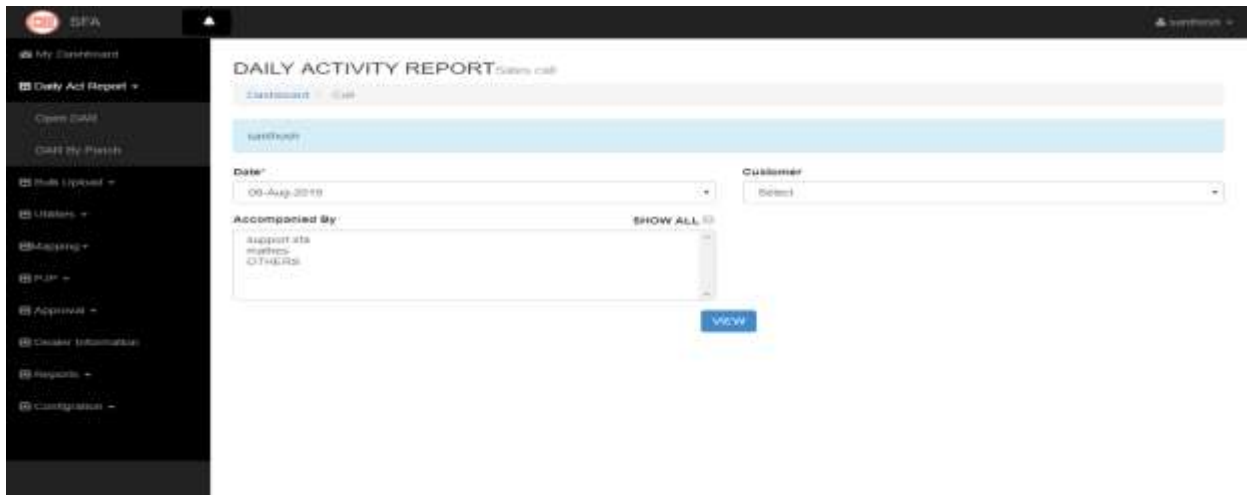
Figure 1.0.1 Sales Call

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.
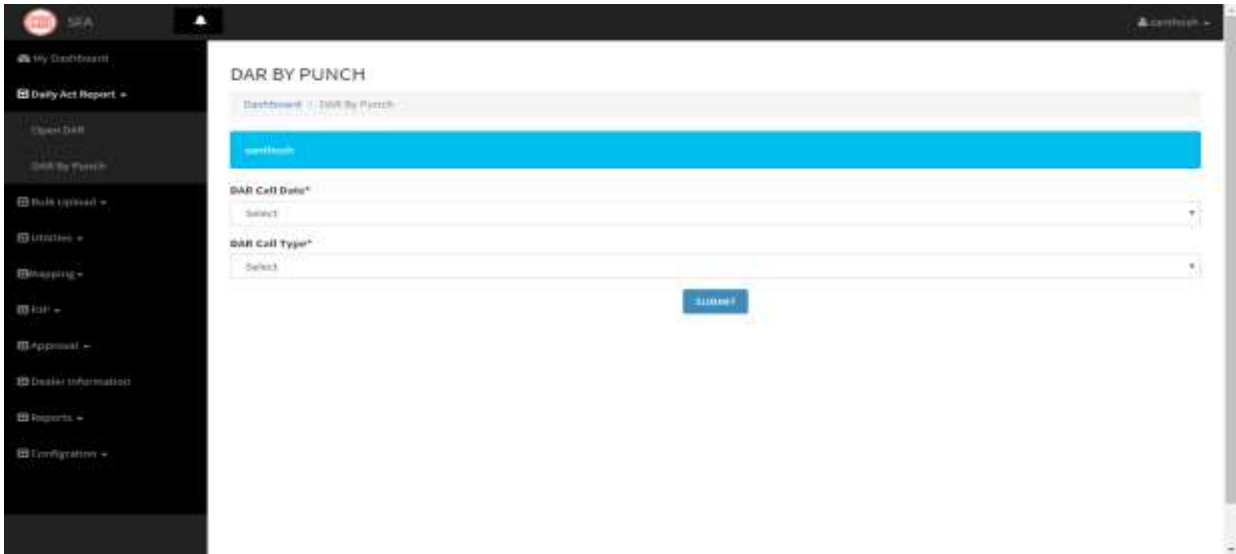
Figure 1.0.2 DAR by Punch

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

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.
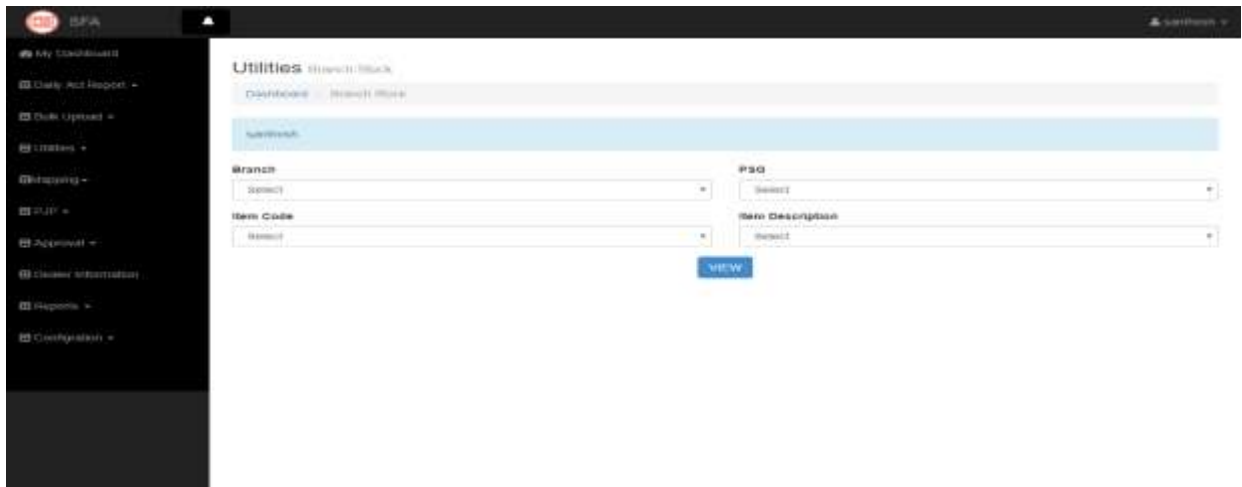
Figure 3.2 Branch Stock

4.2 Executive Target Entry:

Executives target can be entered using this menu.
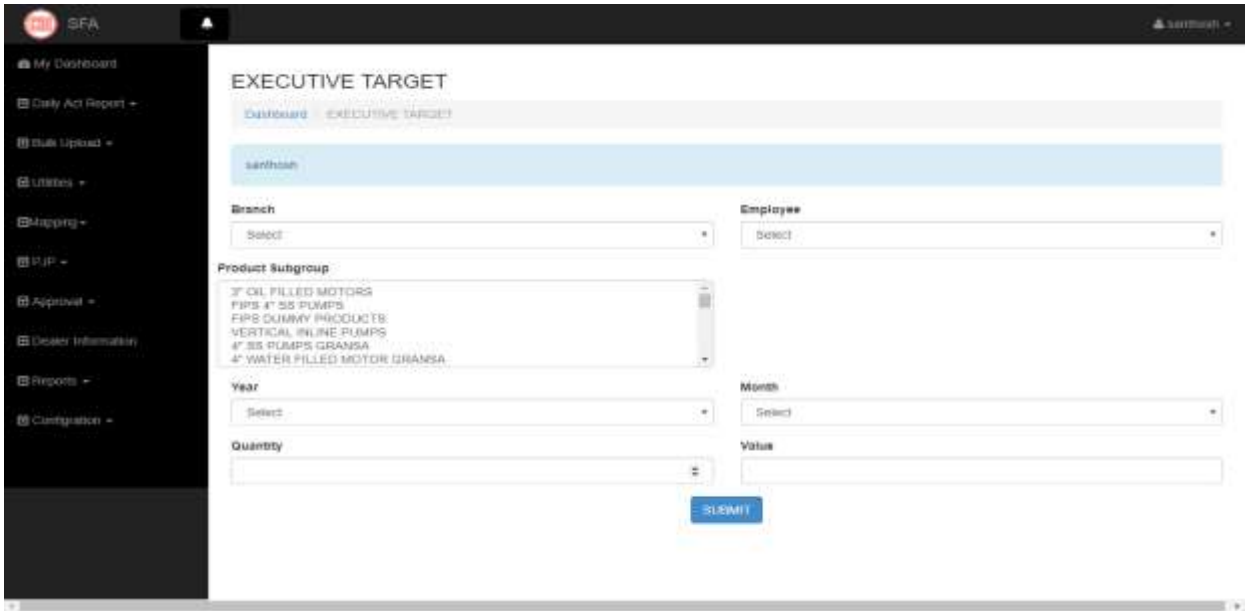
Figure 3.3 Executive Target

4.3 Targets:

Executive Targets can be viewed using this menu.
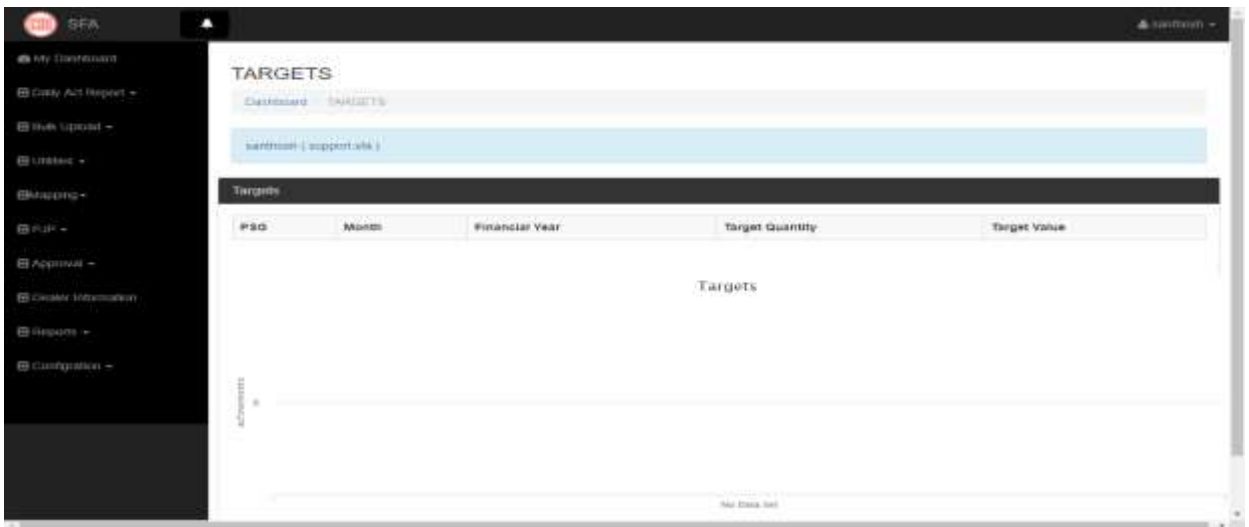
Figure 3.4 Targets

4.4 Data Matrix:

Data matrix is used to collect the competitors info on a particular area.
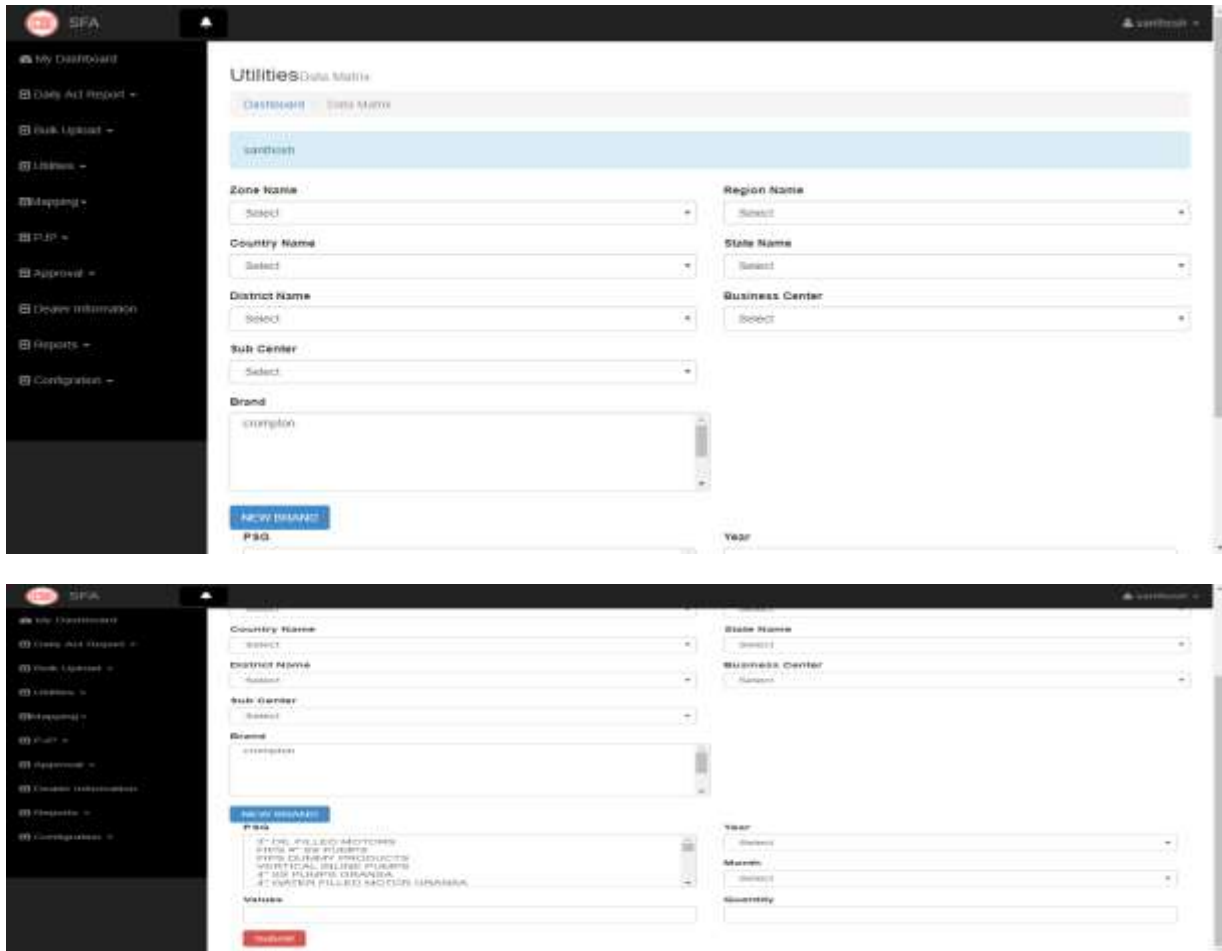
Figure 3.5 Data Matrix

4.5 Employee Dealer Mapping:

This menu is used to map a dealer to the executive.
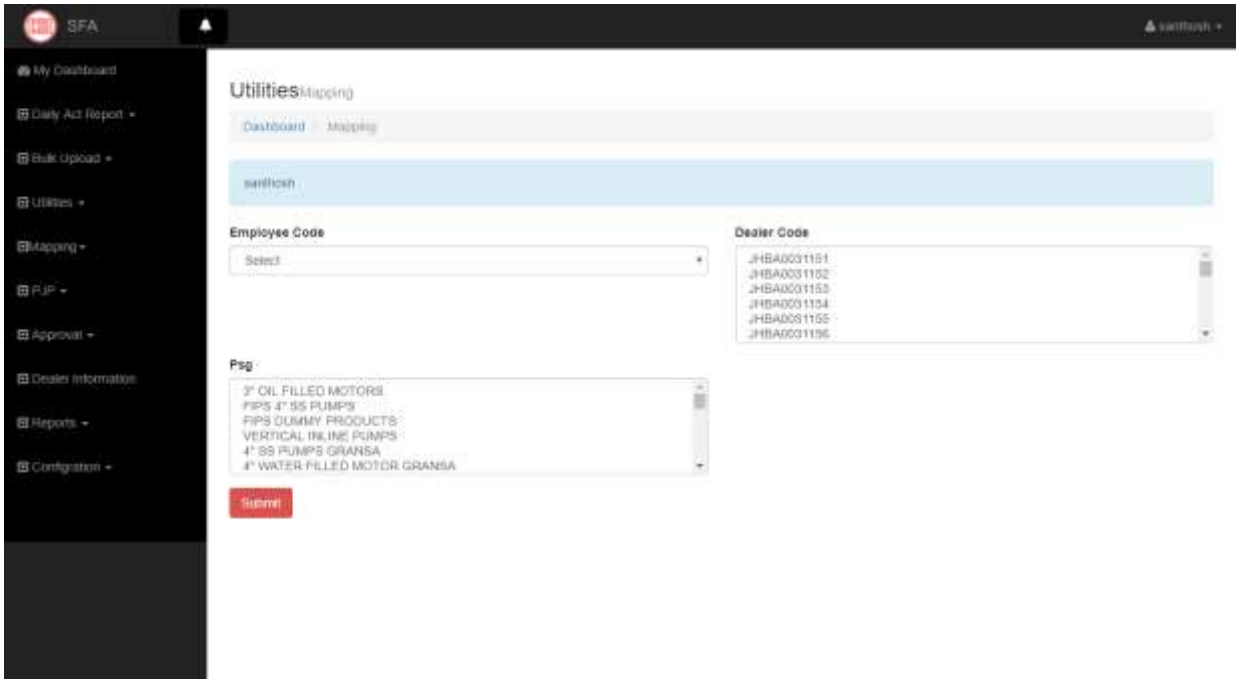
Figure 3.6 Mapping

5. MAPPING:

5.1   IMEI

5.1 IMEI:

IMEI number of the employee can be viewed.

Figure 4.1 IMEI

6. TASK

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

Figure 5.1 TASK

7. Pre Journey Plan:

This menu is used to create a PRE JOUNEY 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.
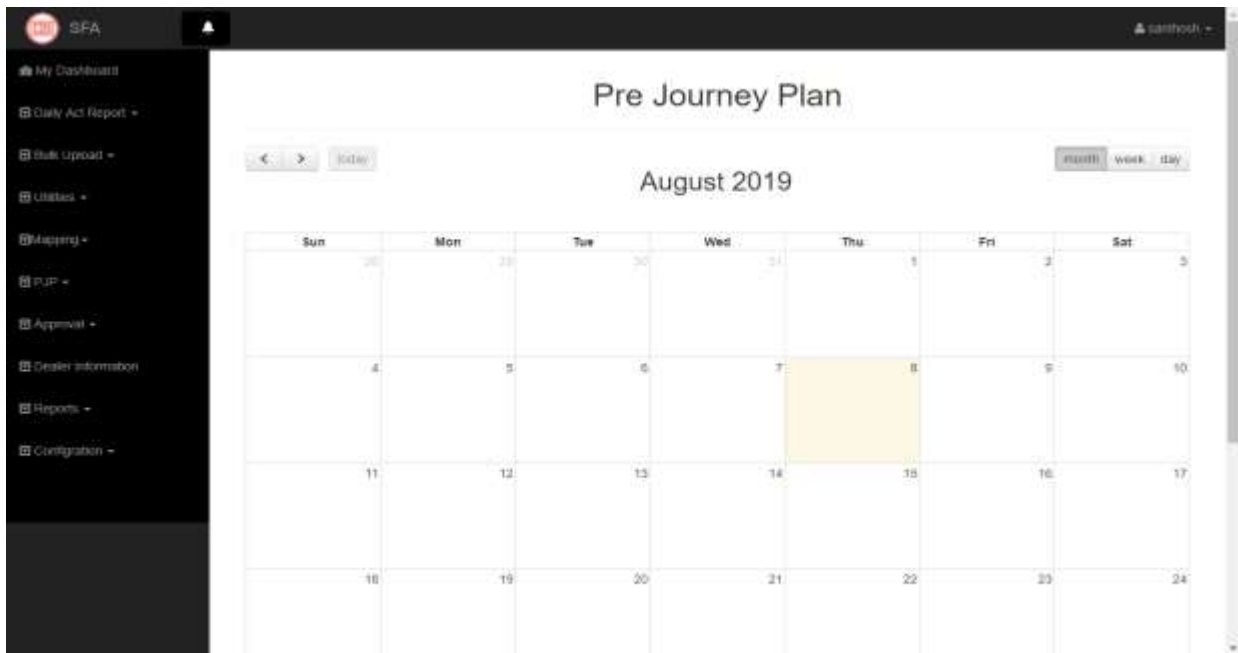
Figure 6.1 Pre Journey Plan

7.2 Report:

Users can view the entered reports.
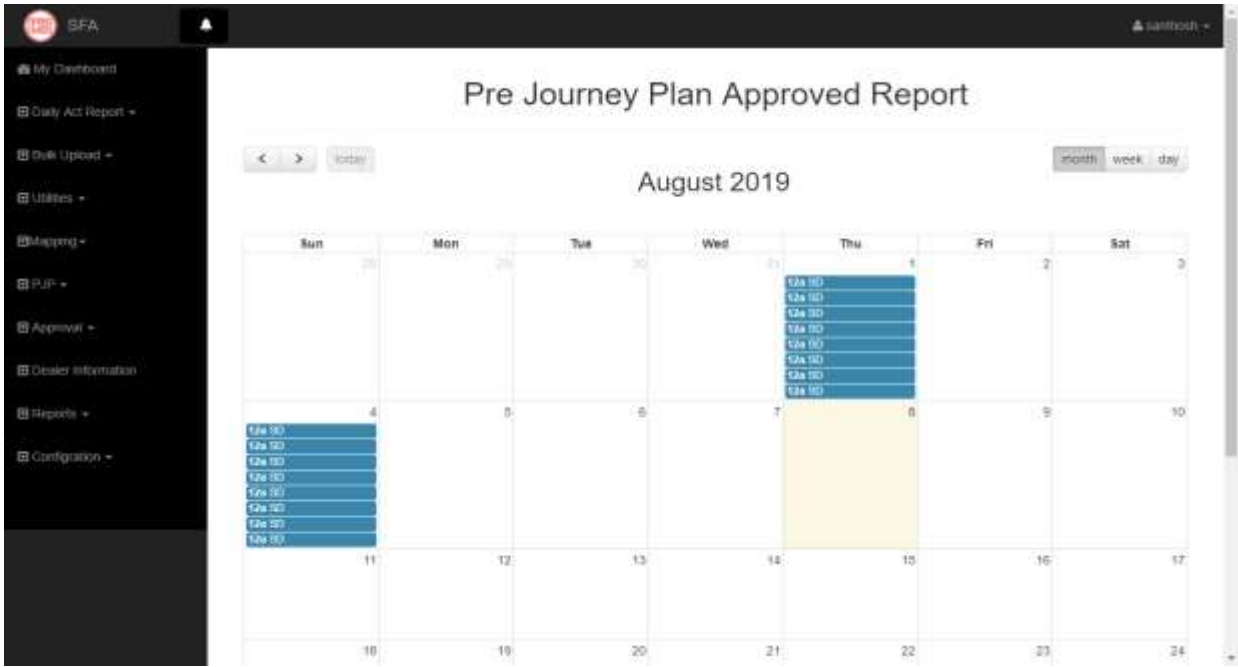
Figure 6.2 Report

8. Approval:
8.1   PJP APPROVAL

8.1 PJP APPROVAL

In this menu can to used to approve the PJP of a reportee.
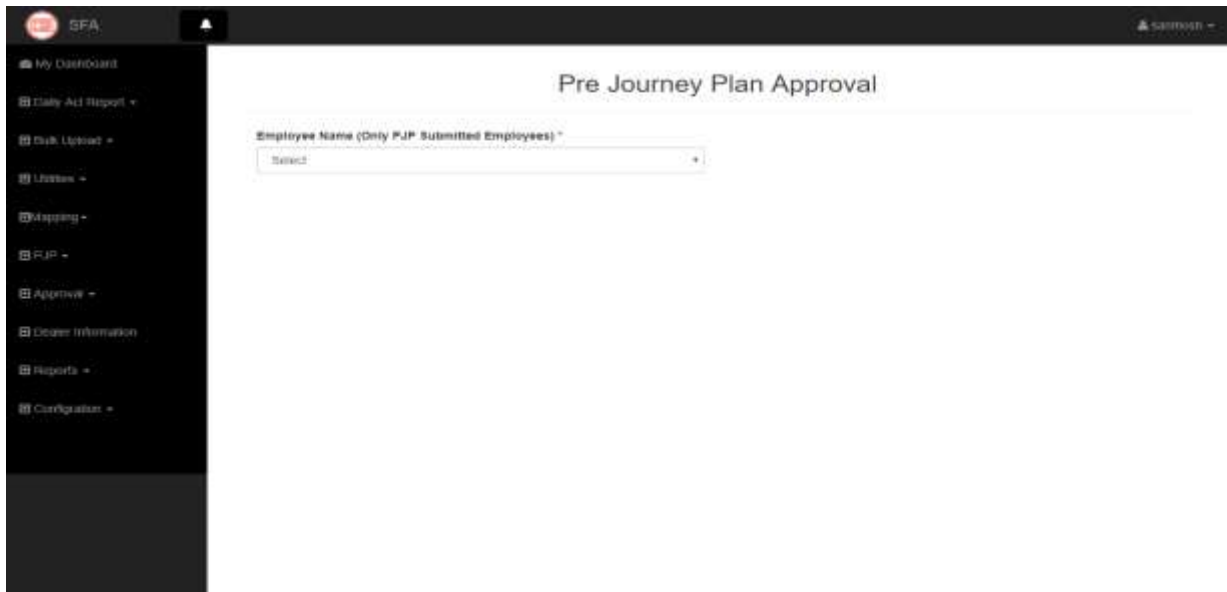
Figure 7.1 PJP APPROVAL SFA

9. DEALER INFORMATION

The dealer information can be viewed in this menu.
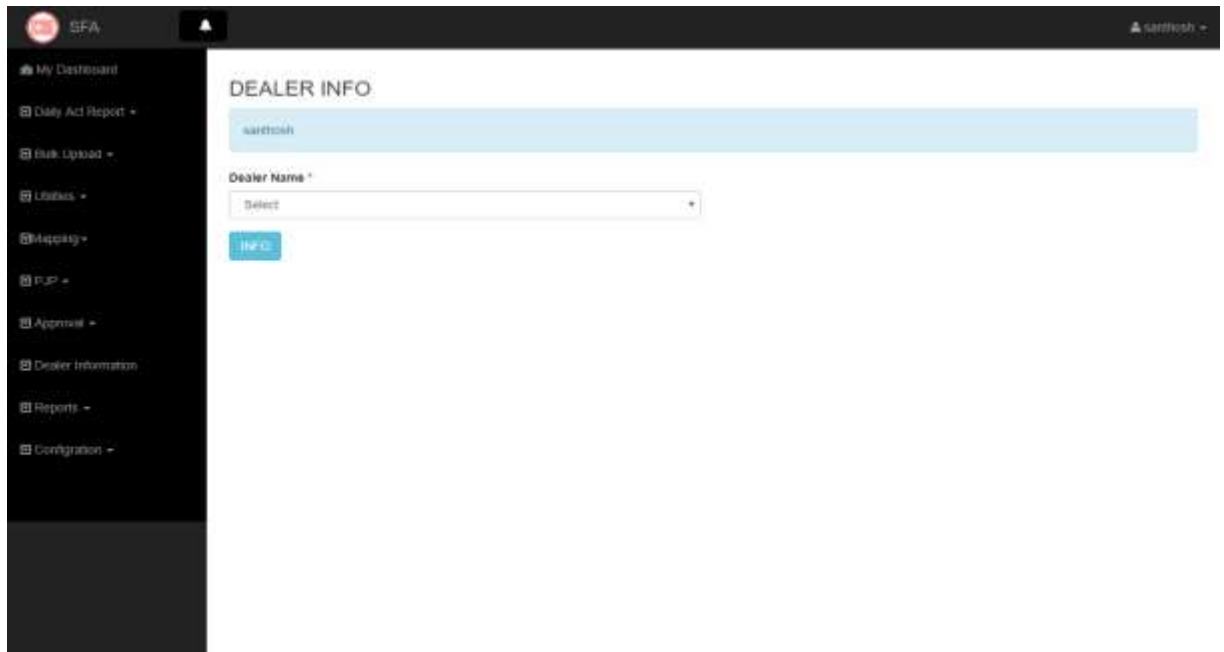
Figure 8.1 DEALER INFORMATION
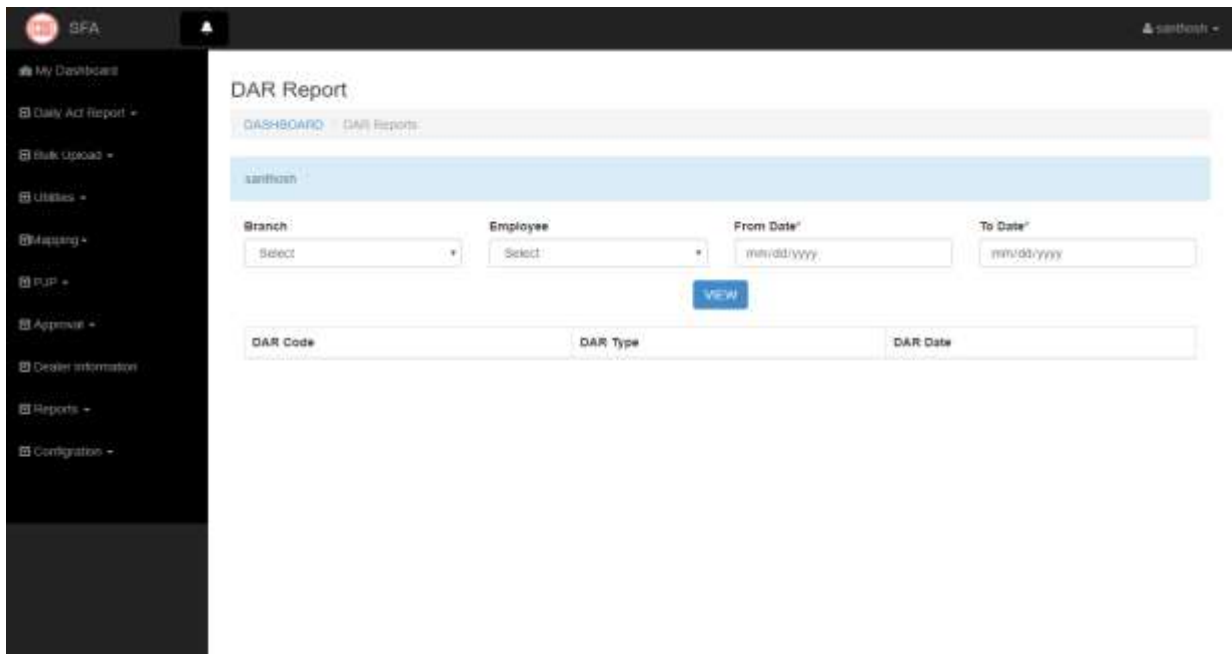
10. REPORTS:
10.1 DAR REPORT
10.2 GPS REPORTS
10.3 TASK MANAGER REPORTS

10.1 DAR REPORT:

Daily activity report can be viewed in this menu.

Figure 9.1 DAR REPORT

10.2 GPS REPORTS:

GPS Reports can be viewed in this menu.
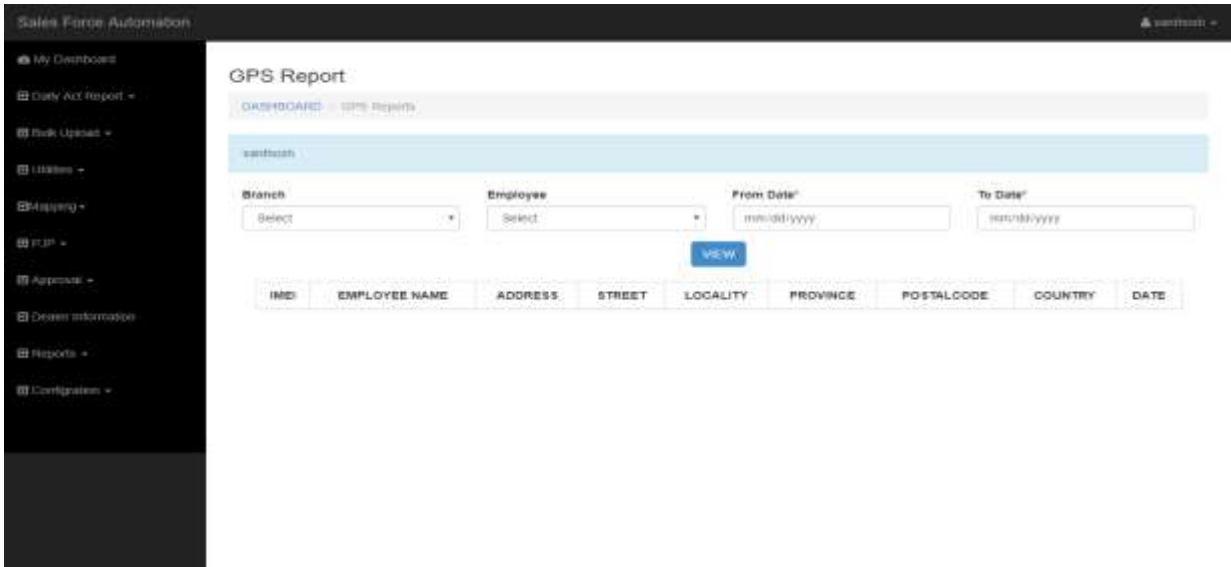
Figure 9.2 GPS REPORTS

10.3 TASK MANAGER REPORTS:

User can view the task Reports using this menu.
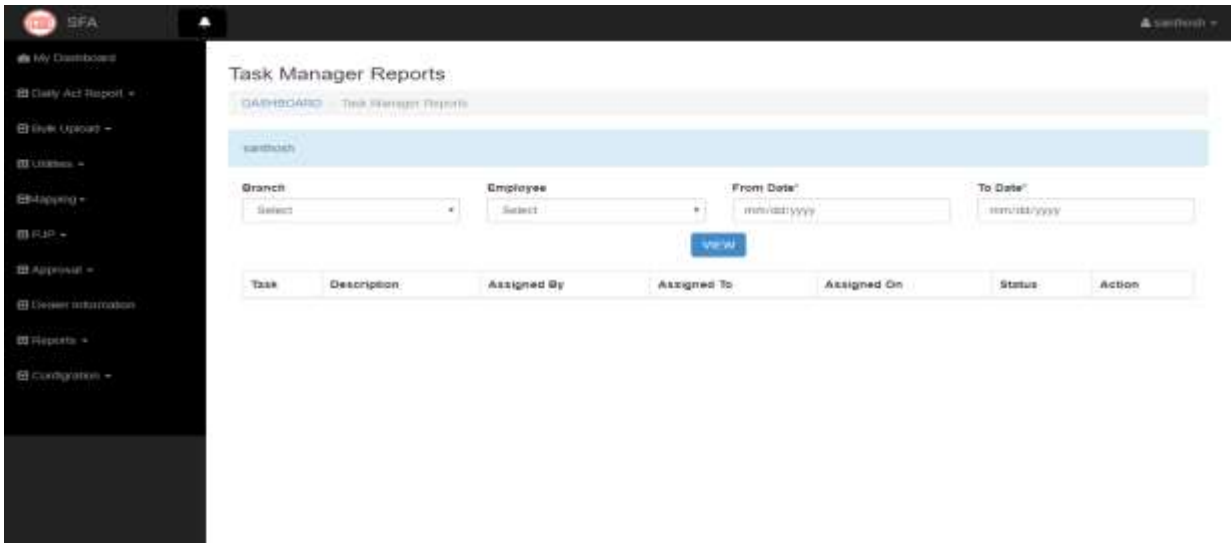
Figure 9.3 TASK REPORTS

11. CONFIGRATION:

11.1 DAR:

This menu is used to set the date limits.

Figure 10.1 DAR

11.2 BRANCH MASTER:
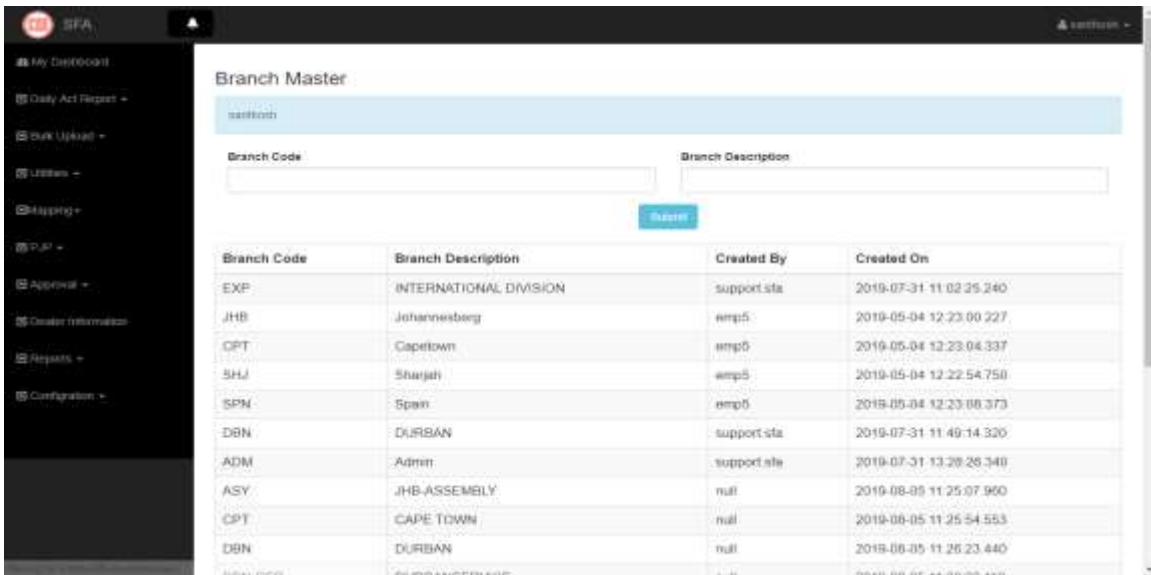
A new Branch can be created using this menu.

Figure 10.2 BRANCH MASTER

11.3 DESIGNATION MASTER
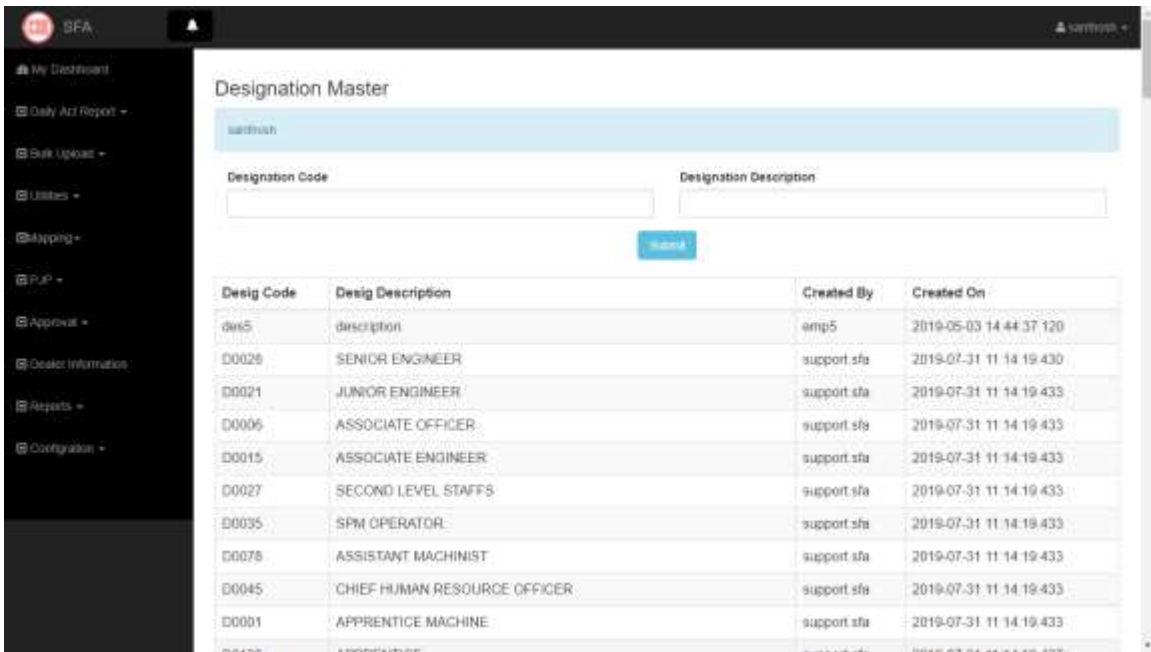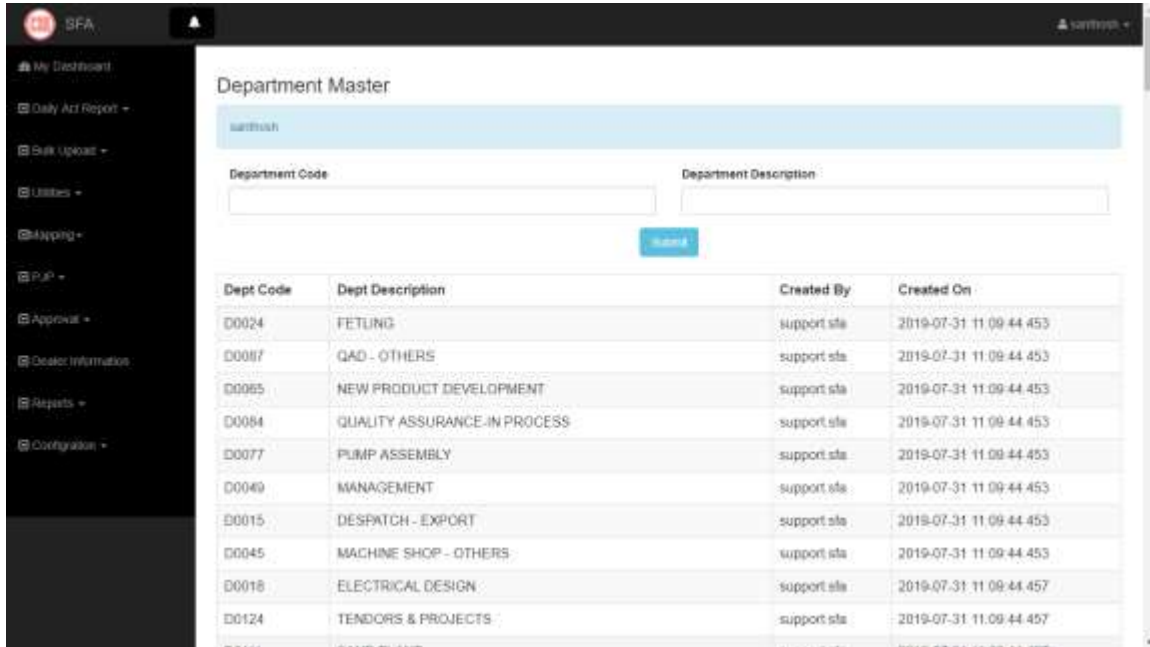
This menu can used to create new Designation.

Figure 10.3 DESIGNATION MASTER

11.4 DEPARTMENT MASTER

This menu is used to create new Department.

Figure 10.4 DEPARTMENT MASTER

11.5 EMPLOYEE MASTER

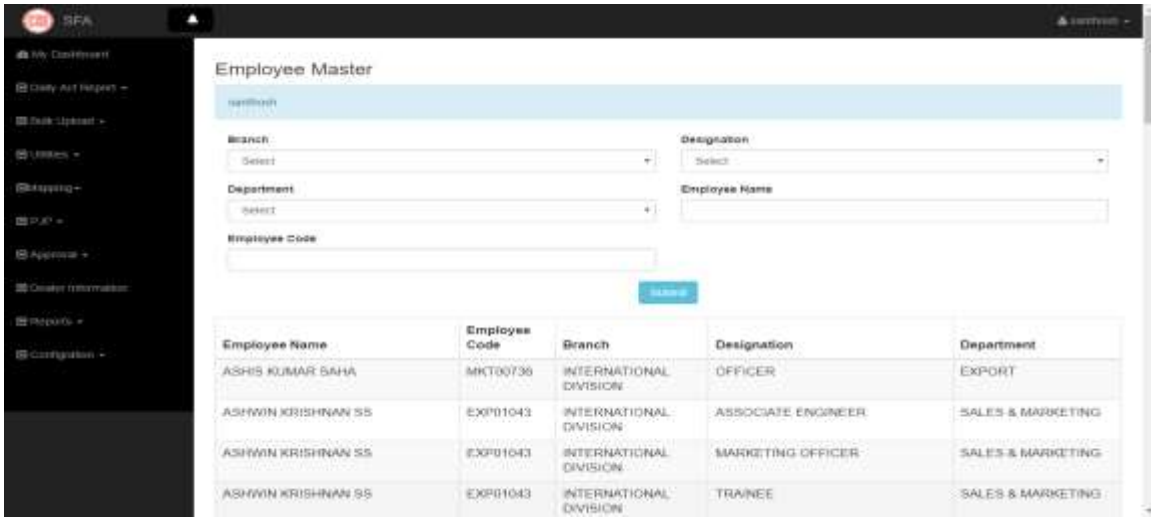A new Employee can be created using this menu.

Figure 10.5 EMPLOYEE MASTER

11.6 ASSIGN TASK:

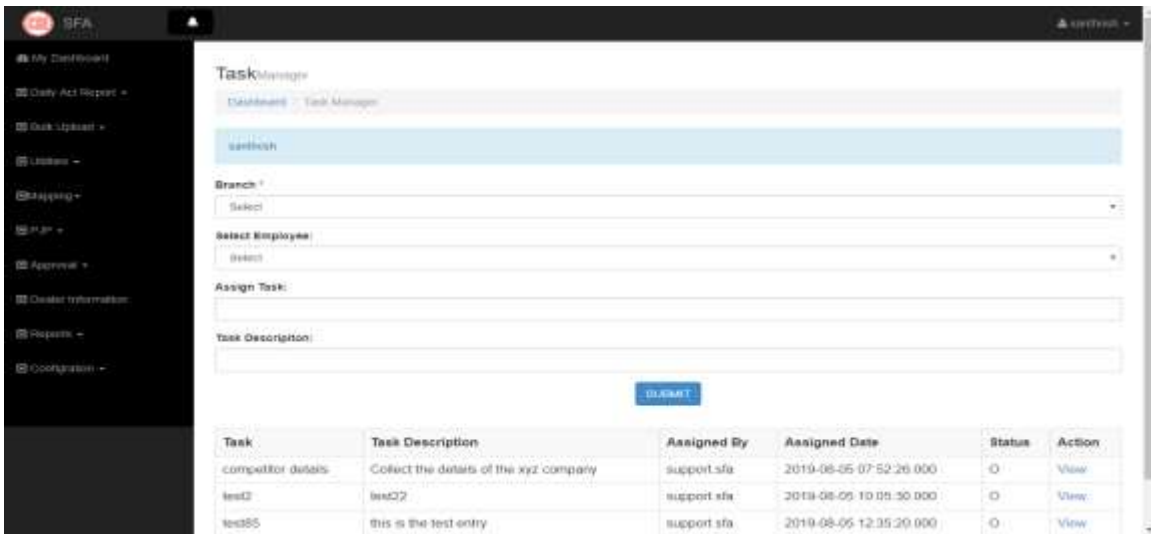Task for the employee can be assign with this menu.

Figure 10.6 ASSIGN TASK

THANK YOU

Contact us for clarification:

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