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**BASIQ/360°**

# Sales Force Automation

+91 935 005 9390

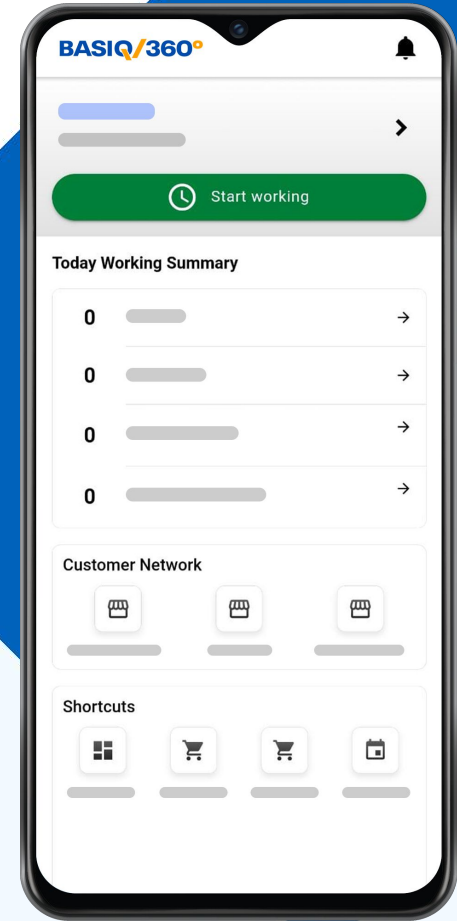
[vikas@basiq360.com](mailto:vikas@basiq360.com)

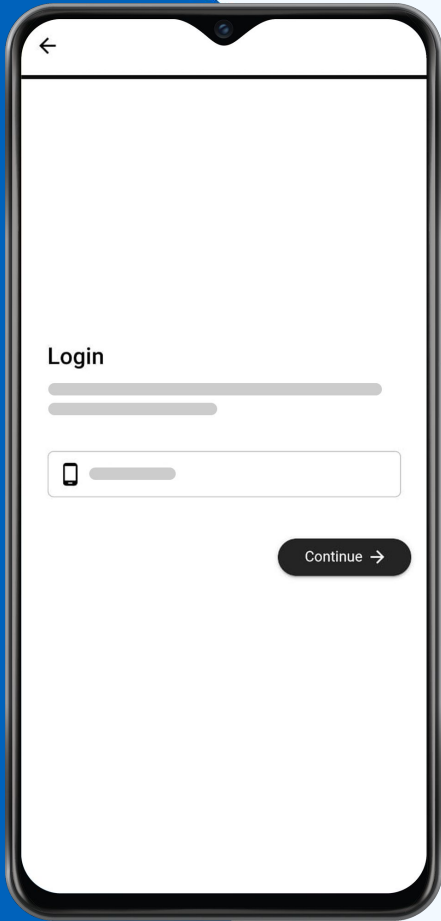
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# Mobile Application for Sales Users

## Overview

The application enables users to manage follow-ups with their customer network. Users can schedule, track, and update follow-ups for both current and future dates.





## Login Process



Download the application from the Play Store or App Store.



Log in using the assigned or given contact number.



Upon entering the contact number, users will receive a One Time Password (OTP).



After logging in, users will arrive at the home screen. This screen displays all modules necessary for daily activities.

## Daily Activities

Sales Users can engage in the following daily activities:



### Attendance:

Mark the start of the workday.

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### Create Follow Up:

Schedule follow-up actions.

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### Check-in:

Record visits to the customer network.

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### Upload Document/Image:

Upload necessary documents or images.

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### Create Order:

Place orders for distributors (primary) or for dealers/retailers (secondary).

# Detailed Activity Descriptions

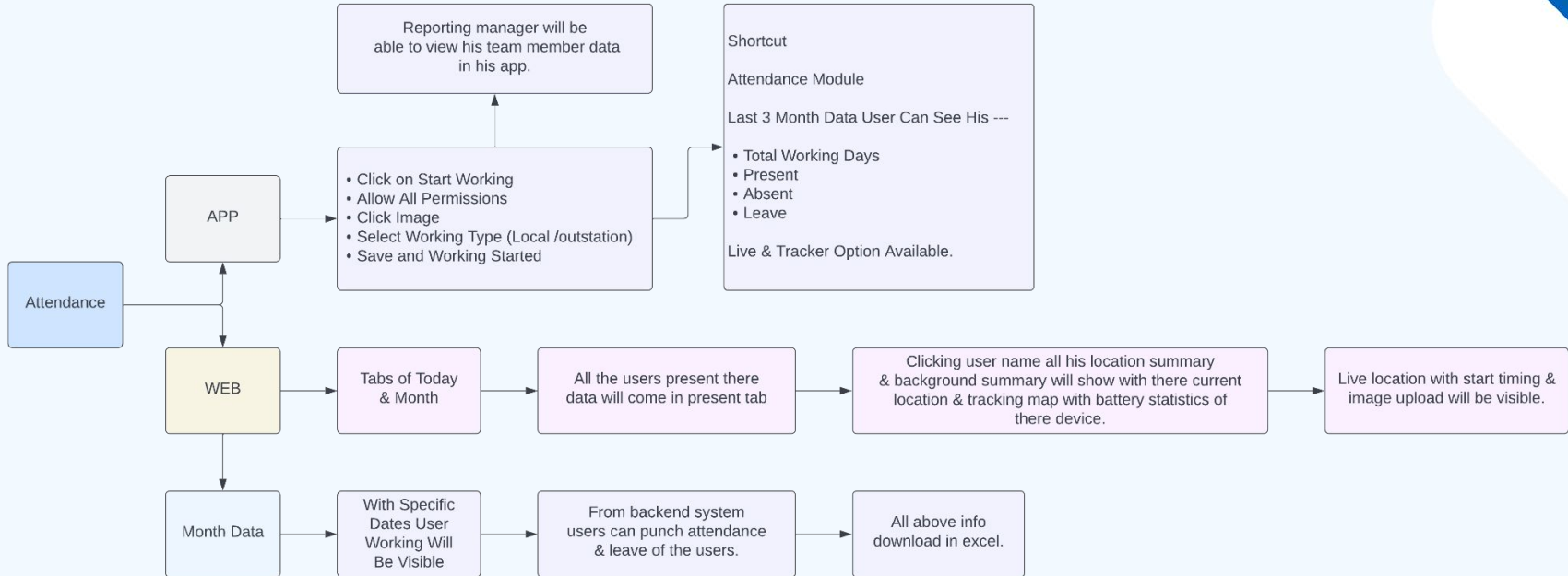
## Attendance

- Users begin their day by marking attendance, which requires enabling all location settings and capturing an image.
- Users select from a dropdown whether they are working within their location or traveling outside the state, then start their attendance.
- In the "Attendance" shortcut tab, users can view their attendance for the past three months, including:
  - Working days
  - Days present
  - Days absent
  - Days on leave
- Details include the start and stop times of the working day and the total working hours.

## Reporting Manager Features

If a user is a Reporting Manager (responsible for a team of sales users), they can view both their attendance and that of their assigned team members.

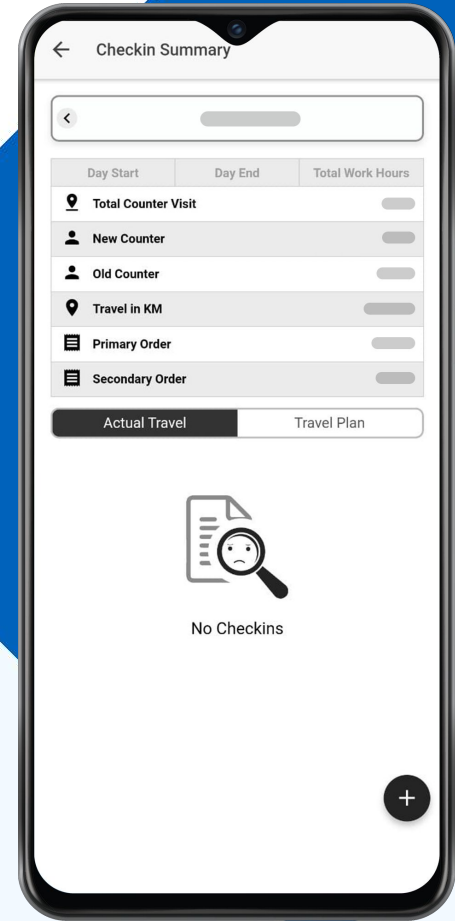
# Attendance Process Flow



# Check-In Process for Sales Users

## Purpose

The check-in feature is designed for Sales Users to record visits within their assigned customer network.



## Steps for Check-In

- **Access Check-In**
- **Navigate to the check-in section to view the check-in summary, which includes:**
  - **Day Start:** Shows the time when the day's work began.
  - **Day End:** Indicates the time when the user finished their work for the day.
  - **Total Working Hours:** Displays the total number of hours worked on that specific day.
  - **Total Counter Visit:** Shows the number of visits made on that specific date.
  - **Total Counter Visit:** Shows the number of visits made on that specific date.
  - **New Counter:** Indicates the count of any new counters visited.
  - **Travel in km:** Displays the total kilometers traveled during the day.
  - **Primary Order:** Shows the count of orders taken or created from distributors/dealers during or outside of check-ins.
  - **Secondary Order:** Indicates the count of orders taken or created from retailers/direct dealers during or outside of check-ins.



## ➤ Adding Check-Ins

➤ Tap the add tab to start the process of adding a new check-in.

➤ The customer network listing will be displayed, allowing the user to select the customer for the check-in.

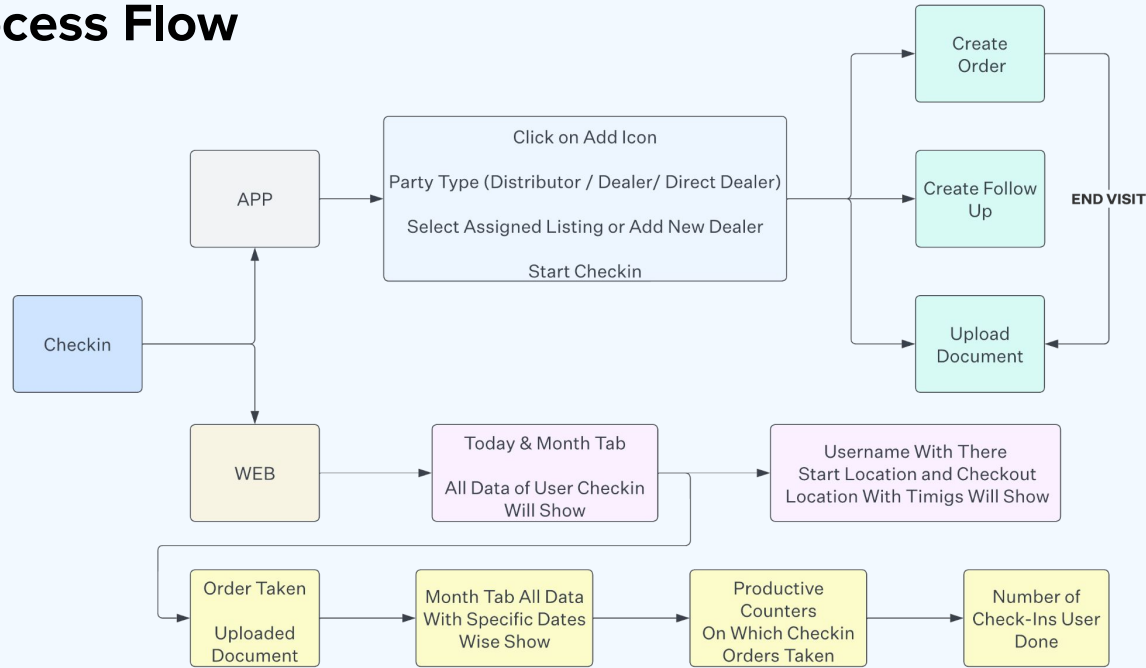
## ➤ Completing the Check-In

- After selecting a customer, the relevant information will be displayed for the user to proceed with adding the check-in.
- Users must enter all displayed information, including a mandatory description of the work started.
- Subsequent actions include creating orders, creating follow-ups, and uploading documents (with an option to select from the gallery or use the camera).

## ➤ Ending the Visit

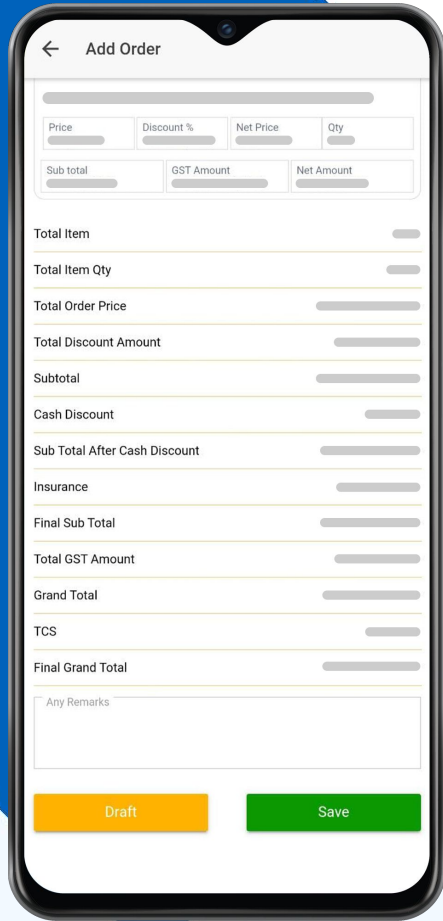
- Complete the check-in process by ending the visit.

# Check-In Process Flow



## Additional Notes

- Users can perform multiple check-ins within the same day following these steps.
- If a Sales User is also a Reporting Manager (overseeing a team of sales users), they can view their own check-ins as well as those of their team members.



# Adding Primary Orders Through the Application

## Process Overview

To add primary orders, users follow a structured process within the application. The system categorizes orders into various statuses for easy management and tracking.

## Order Status Categories

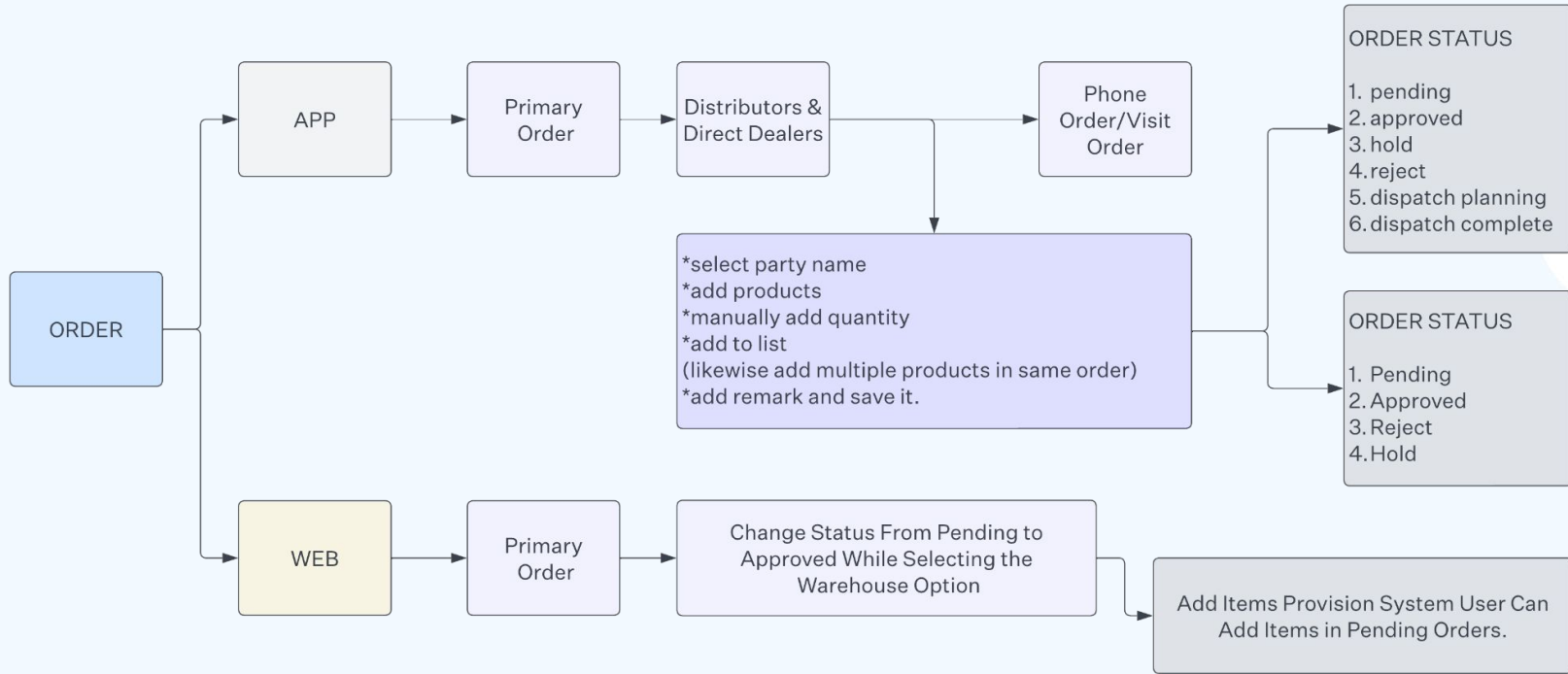
- **Draft:** Orders not yet saved.
- **Pending:** Orders awaiting approval from seniors or managers.
- **Approved:** Orders that have received approval.
- **Hold:** Orders paused due to specific reasons by seniors or managers.
- **Partially Dispatched:** Orders that are dispatched but not in full.
- **Dispatched:** Fully dispatched orders.
- **Rejected:** Orders declined by seniors or managers.

## Steps to Add Primary Orders

- 1 Initiate:** Tap the add icon and select from the customer network.
- 2 Select Customer:** Choose an assigned customer from the list provided.
- 3 Choose Products:** Pick the product items from the list.
- 4 Enter Quantities:** Manually input the quantity for each product.
- 5 Compile Order:** Add the selected products and quantities to the order list, displaying the total order sum.
- 6 Save or Draft:** Save the order for final submission or keep it as a draft for later review.

## Editing Orders

- Users can edit order details, including product items and quantities, through the order's detailed page.



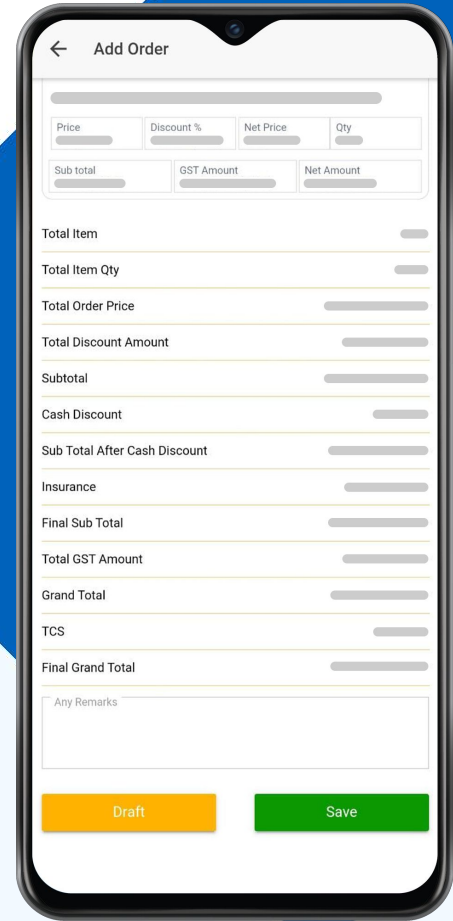
## For Reporting Managers

- Reporting Managers can view both their primary orders and those of their team members.

# Adding Secondary Orders Through the Application

## Process Overview

Adding secondary orders involves a similar process with a focus on retailers and their assigned distributors.



The image shows a smartphone screen with the 'Add Order' form. The form is titled 'Add Order' and has a back arrow on the left. It contains several input fields for order details, a summary section, and a remarks field at the bottom.

| Price                | Discount %           | Net Price            | Qty                  |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Sub total            |                      | GST Amount           | Net Amount           |
| <input type="text"/> |                      | <input type="text"/> | <input type="text"/> |

|                               |                      |
|-------------------------------|----------------------|
| Total Item                    | <input type="text"/> |
| Total Item Qty                | <input type="text"/> |
| Total Order Price             | <input type="text"/> |
| Total Discount Amount         | <input type="text"/> |
| Subtotal                      | <input type="text"/> |
| Cash Discount                 | <input type="text"/> |
| Sub Total After Cash Discount | <input type="text"/> |
| Insurance                     | <input type="text"/> |
| Final Sub Total               | <input type="text"/> |
| Total GST Amount              | <input type="text"/> |
| Grand Total                   | <input type="text"/> |
| TCS                           | <input type="text"/> |
| Final Grand Total             | <input type="text"/> |

Any Remarks

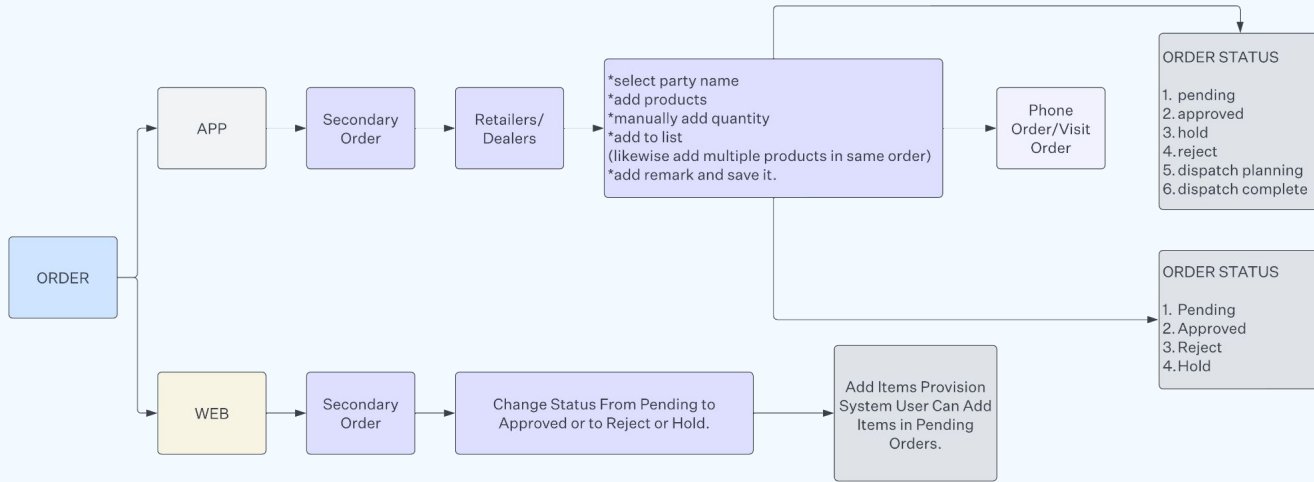
## Order Status Categories

- **Draft:** Orders not yet finalized.
- **Pending:** Orders waiting for managerial approval.
- **Approved:** Orders approved by seniors or managers.
- **Rejected:** Orders not approved by seniors or managers.

## Steps to Add Secondary Orders

- 1 Tap the add icon and select a retailer.
- 2 The retailer's assigned distributor will be shown for selection.
- 3 Choose a product item from the listing.
- 4 Enter the quantity and add to list; all product details, including the total order amount, will appear.
- 5 For adding multiple products, repeat the selection process and add them to the list. Orders can be saved in draft or finalized.



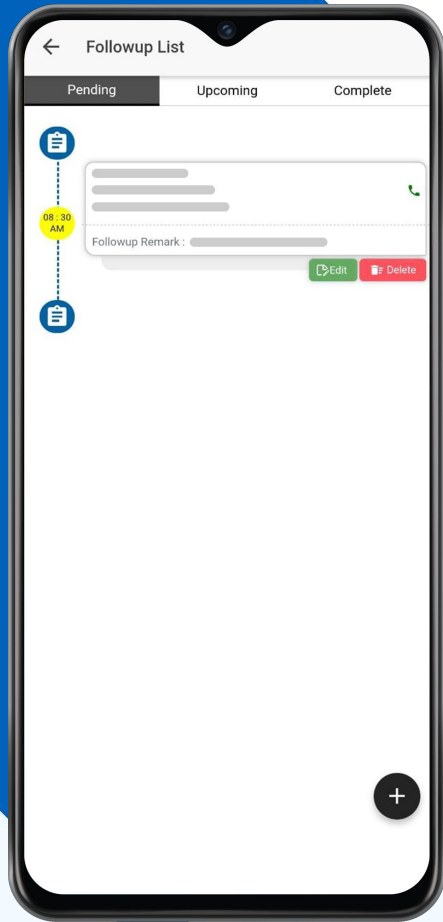


## Editing Orders

- The application allows for the editing of order details on the specific order page.

## For Reporting Managers

- Reporting Managers have access to view their secondary orders as well as those of their team members, ensuring oversight and management capability.



# Follow-Up Management in Application

## Overview

The application enables users to manage follow-ups with their customer network. Users can schedule, track, and update follow-ups for both current and future dates.

## Types of Follow-Ups



### Pending Follow-Up

These are follow-ups that have not been completed by the specified date and are listed under the pending tab.



### Upcoming Follow-Up

Follow-ups scheduled for future dates, whether in the coming days or weeks, are listed under the upcoming tab.



### Complete Follow-Up

Once a follow-up has been executed by the user, it is moved to the complete tab.

## Managing Pending Follow-Ups

Users can change the status of a specific follow-up from pending to complete. This is done by editing the status, adding a remark, and updating it. The follow-up then moves from the pending tab to the complete tab.

## Creating a Follow-Up Without Check-In

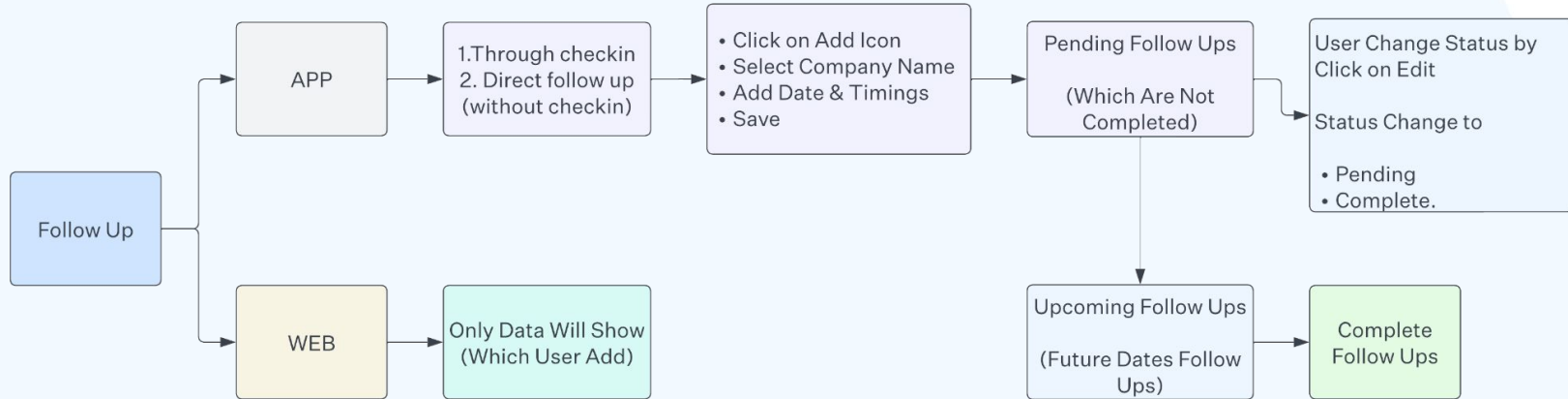
Steps to create a follow-up:

- Click the add icon.
- Select the follow-up date.
- Select the time for the follow-up.
- Choose the customer network type.
- Select the assigned customer network.
- Add a remark to detail the purpose or content of the follow-up.

### **Note:**

If a follow-up is created for a date that already has a scheduled follow-up (e.g., June 25th), the user must adjust either the date or the timing to accommodate the new follow-up. This ensures clarity and prevents scheduling conflicts within the application.

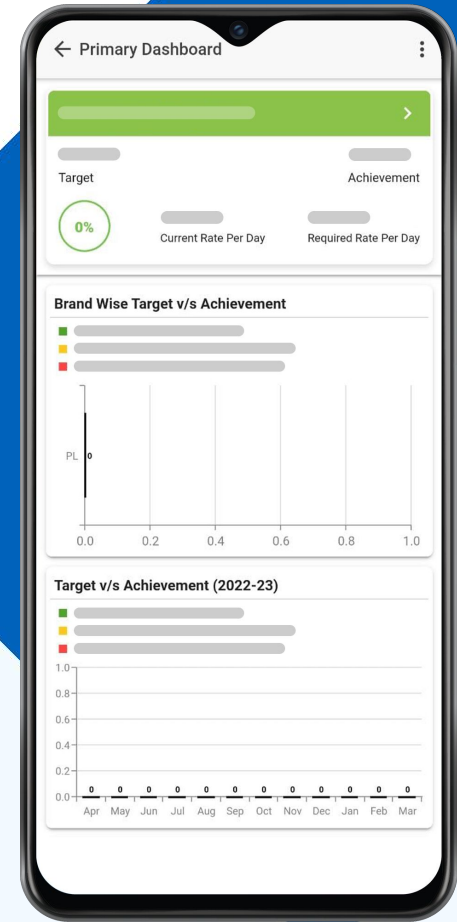
# Follow-up Process Flow

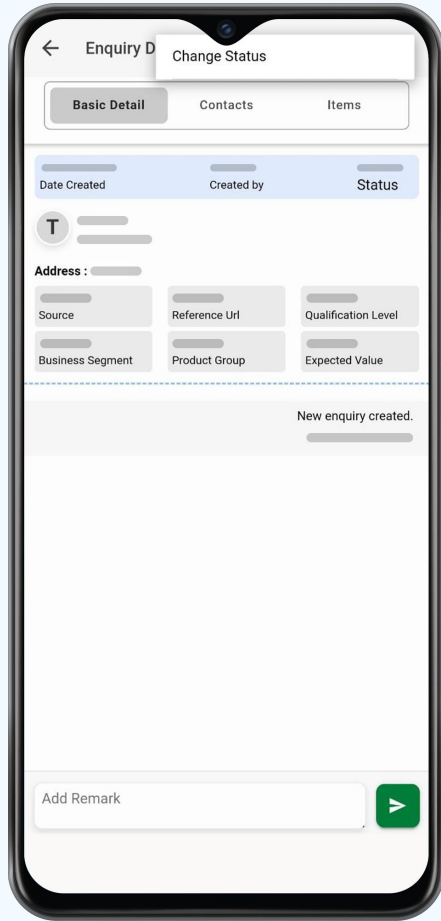


# Dashboard and Enquiry Management

## Dashboard Overview

The dashboard provides Sales Users with a visual representation of their primary and secondary targets alongside their achievements. This data is displayed in graphical form to enable easy tracking of performance.





## Key Metrics on Dashboard

### Current Rate Per Day

This metric indicates the average rate at which the user is currently achieving their targets.

### Required Rate Per Day

This metric shows the average rate needed for the user to meet their targets successfully.

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## Enquiry Management

The enquiry module is designed to manage potential buyers and track their progress towards becoming part of the customer network.

## Enquiry Module Tabs



### Qualified

Enquiries that have been evaluated and approved by seniors or managers. These are then assigned to specific users and appear under the qualified tab in their application.

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### Win

Enquiries that have successfully transitioned from potential buyers to actual customers. Users can update the status from qualified to win.

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### Loss

Enquiries that did not result in the conversion of potential buyers into customers. The status can be updated from qualified to loss by the user.



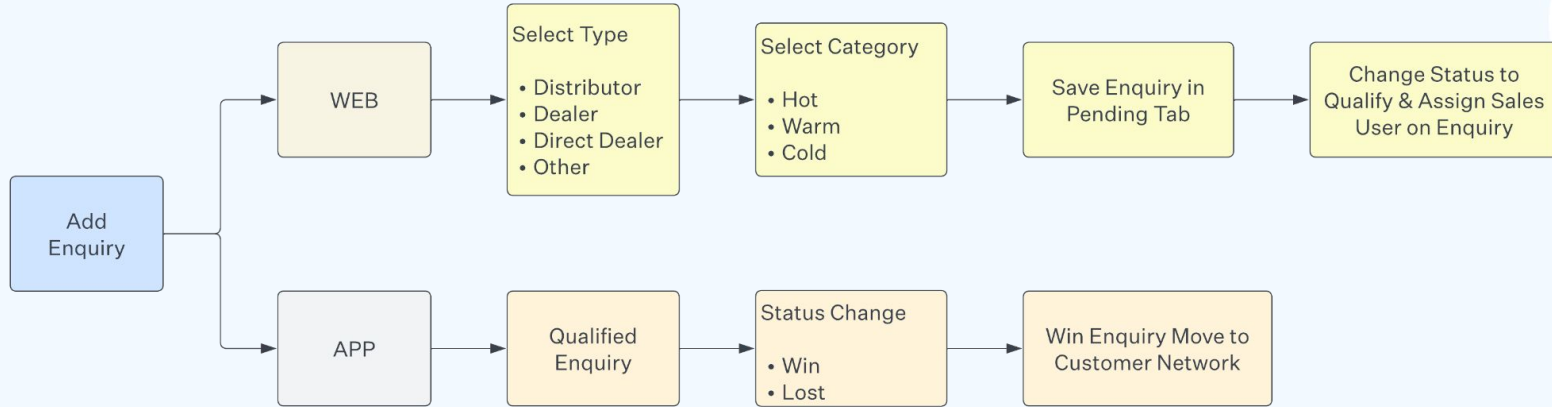
## Adding an Enquiry

### To add an enquiry

- Click the add icon and enter the necessary information in the add enquiry form.
- Select the type as customer network.
- Choose the source of the enquiry (e.g., Facebook, website, call, walk-in) and select the appropriate option.
- Categorize the enquiry as warm, hot, or cold.
- Enter the contact person's name and all relevant address information.
- Save the enquiry information.

After saving, users can access detailed information about the enquiry and update its status as needed.

# Add Enquiry Process Flow



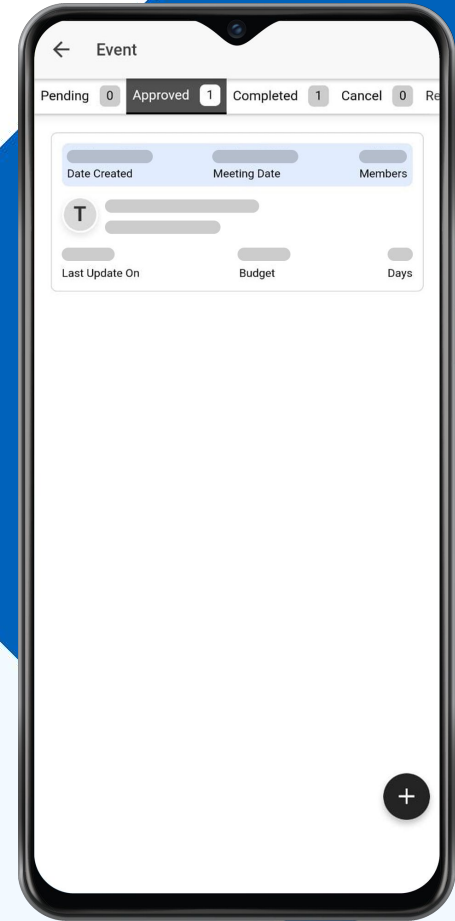
## Reporting Manager Access

If a user holds the role of a Reporting Manager, overseeing a number of sales users, they can view their own enquiries as well as those of their team members, ensuring oversight and support in managing potential customer interactions effectively.

# Event Plan Management

## Overview

Event planning involves organizing details for various types of events, including meetings, conventions, trade shows, ceremonies, retreats, or parties. An event plan document is crucial as it outlines all aspects of an event.



← Add Event

Select Event Type\*

Firm Name\*

Firm Mobile\*

Event Date\*

Total Member\*

Per Plumber Budget\*

Total Budget\*

Description

Save

## Adding an Event Plan To add an event plan in the application

**Navigate to the event plan section, where you will find the following tabs:**

**Pending:** For event plans created by the user but not yet approved by seniors or managers.

**Approved:** For event plans that have been created and approved by seniors or managers.

**Completed:** For events that the user has attended, marking them as complete.

**Cancel:** For events that are canceled for any reason.

**Rejected:** For event plans rejected by seniors or managers.

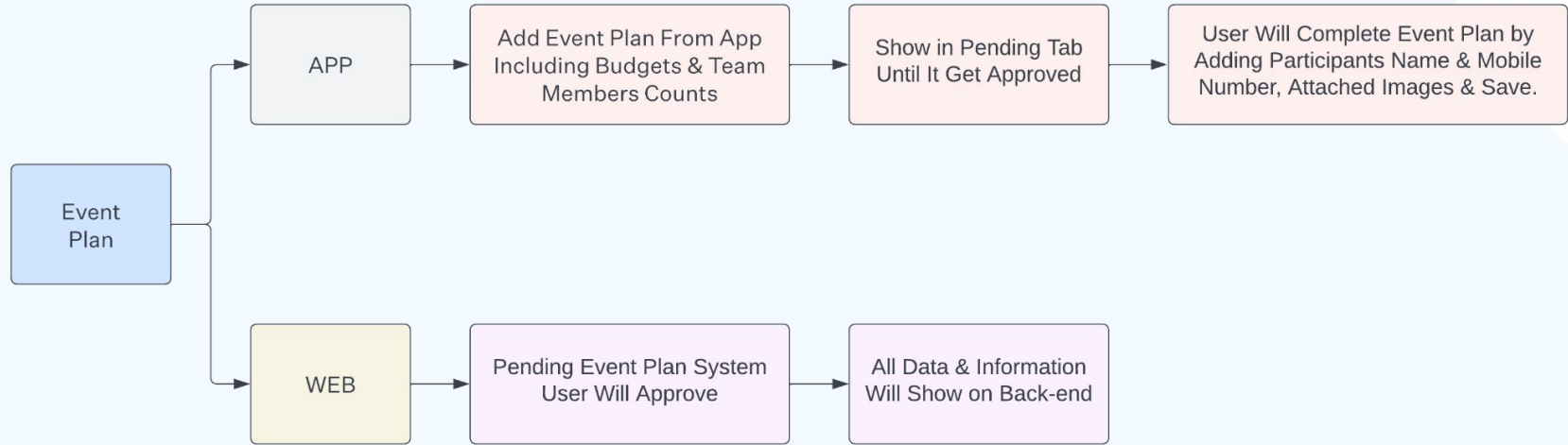
## To add an event

- Select the customer network type.
- Choose the assigning listing that appears after selecting the customer network.
- Add the event date and the total number of members attending.
- Include the budget for the event.
- Provide a mandatory description.
- Save the event, and it will appear under the pending tab.

## Approval Process

Event plans are approved by system users, managers, or seniors. Once approved, the detailed information of the event plan will be displayed in the approved tab.

# Add an Event Process Flow



## **Completing an Event Plan** To mark an event plan as complete

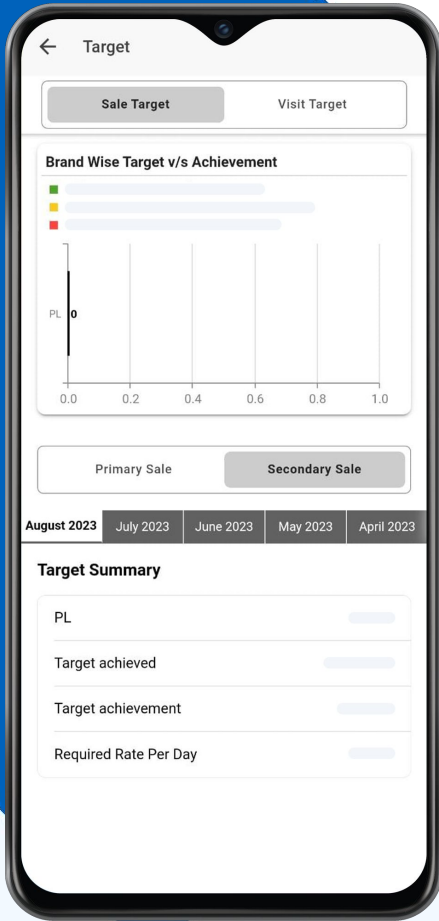
- Access the details of an approved event plan.
- Enter the number of participants who attended the event.
- Upload images or documents related to the event.
- Mark the event plan as complete.

If an event is canceled, it should be updated accordingly in the cancel tab.

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## **Reporting Manager Access**

A Reporting Manager, who oversees a team of sales users, can view both their own and their team members' event plans.



# Target Management

## Target Overview

Targets are assigned to sales users by their seniors, managers, or system users, based on primary or secondary sales goals.



## Target Summary

**Target Achieved:** Shows the amount of the target that has been met.

**Required Rate Per Day:** Indicates the average target amount needed to be achieved daily.

**Target Status:** Displays the progress of the target. Users can also view their sales performance over the last five months.

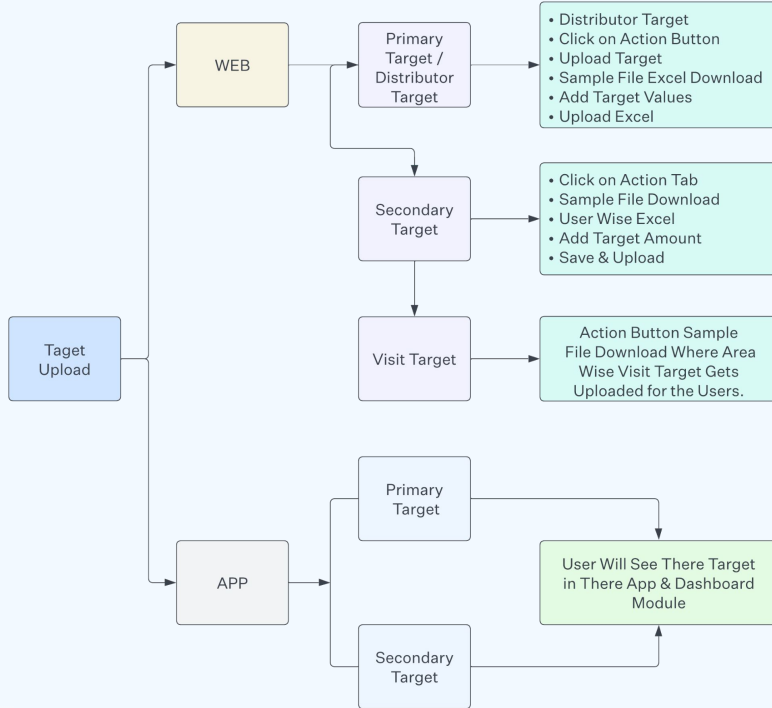
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## Types of Targets

**Sale Target:** Assigned to users for achieving specific sales goals with distributors or retailers for primary or secondary sales.

**Visit Target:** Relates to the number of visits made to new or existing counters, with specific targets assigned accordingly.

# Target Process Flow



# Reporting Manager Visibility

A Reporting Manager can view both their own targets and those of their assigned team members, ensuring comprehensive oversight of target achievement and event planning within the team.

# Point of Purchase (POP) & Gift Management

## Overview

Marketers and retailers deploy point of purchase (POP) displays to captivate customers' attention, a strategy crucial for maintaining competitiveness in the market. System users, managers, or seniors can assign POP and gifts for distribution to specific customer networks.



The screenshot shows a mobile application interface for adding POP & Gift. The form includes a back arrow and the title 'Add Pop & Gift' at the top. Below the title are several input fields: a dropdown menu for 'Select Type', another dropdown menu for 'Select Item', two input fields for 'Stock Available' and 'Qty\*' (with an asterisk indicating it is required), and a larger text area for 'Remark'. At the bottom of the form is a grey 'Submit' button.

## Adding POP & Gift in Application To distribute POP & gifts

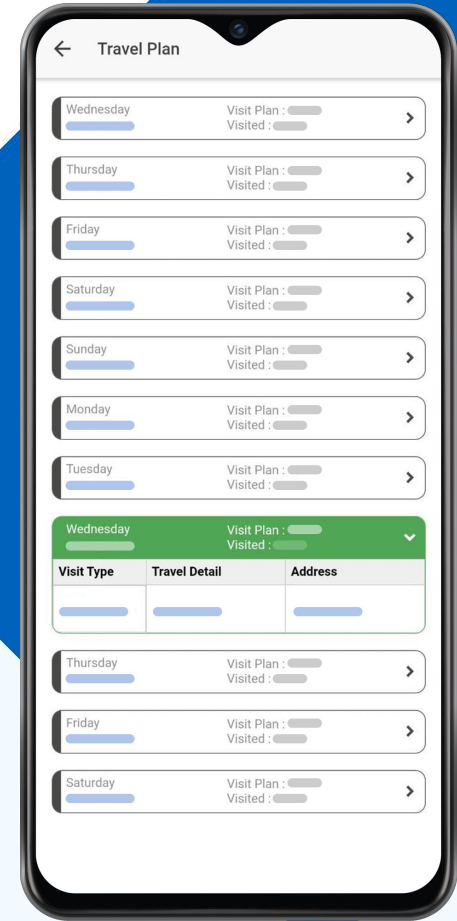
- Select the customer network type.
- Add the chosen customer network.
- Select the item or product name.
- Add the quantity based on available stock.
- Include a remark for clarity.
- Submit the assignment.

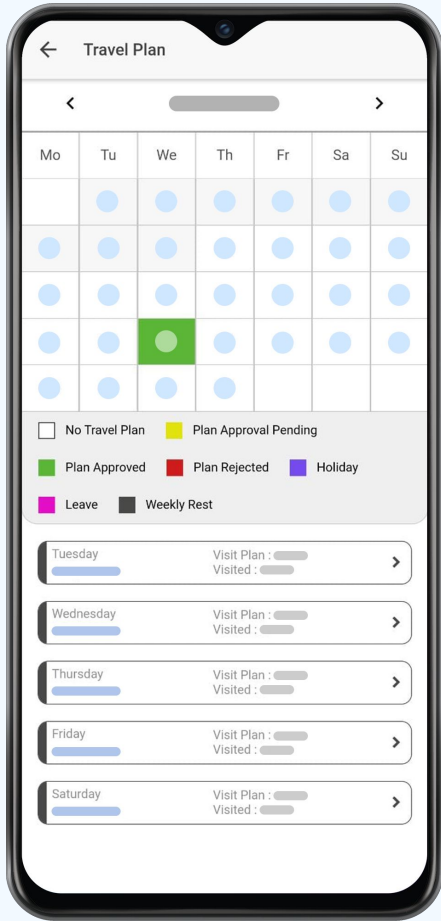
After submission, an OTP/OTA is sent to the selected customer network. The user must confirm this code in the application to finalize the assignment of POP & gifts to the specified customer network.

# Travel Plan Management

## Target Overview

The travel plan feature is designed for users planning visits to customer networks, with plans color-coded in the application calendar for easy reference.





## Color Codes in Calendar

- White:** No travel plan.
- Yellow:** Pending travel plans.
- Green:** Approved travel plans.
- Red:** Rejected travel plans.
- Purple:** Holidays.
- Magenta:** Leave days.
- Black:** Weekly offs.

## Creating a Travel Plan

- Choose a date from the calendar.
- Add the area to be visited.
- Specify the visit's purpose. The travel plan for the chosen date is then saved, providing a clear itinerary including planned and completed visits.

# Expense Management

The image shows a smartphone screen with the 'Expense Add' application. The screen is divided into two tabs: 'Local Conveyance' (selected) and 'Outstation Travel'. The form contains the following fields:

- Mode Of Travel\* (dropdown menu)
- Class\* (dropdown menu)
- Date\* (text input)
- Start Location\* (text input)
- End Location\* (text input)
- Distance (KM)\* (text input)
- Amount\* (text input)
- MISCELLANEOUS Detail (text input)
- MISCELLANEOUS Amount (text input)

Below the text inputs is a thumbnail image of a document. At the bottom of the form is a dashed box with a plus icon and the text 'Upload Your Bill Here'. A black 'Submit' button is located at the very bottom of the screen.

## Types of Expenses

### Local Conveyance

For travel within the local area.

### Outstation Conveyance

For travel outside the local area.

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## Claiming Expenses

The expense tab contains three categories



### Pending

Expenses awaiting approval.



### Approved

Expenses approved by seniors or managers.



### Rejected

Expenses rejected by seniors.



## To Add Local Conveyance Expense

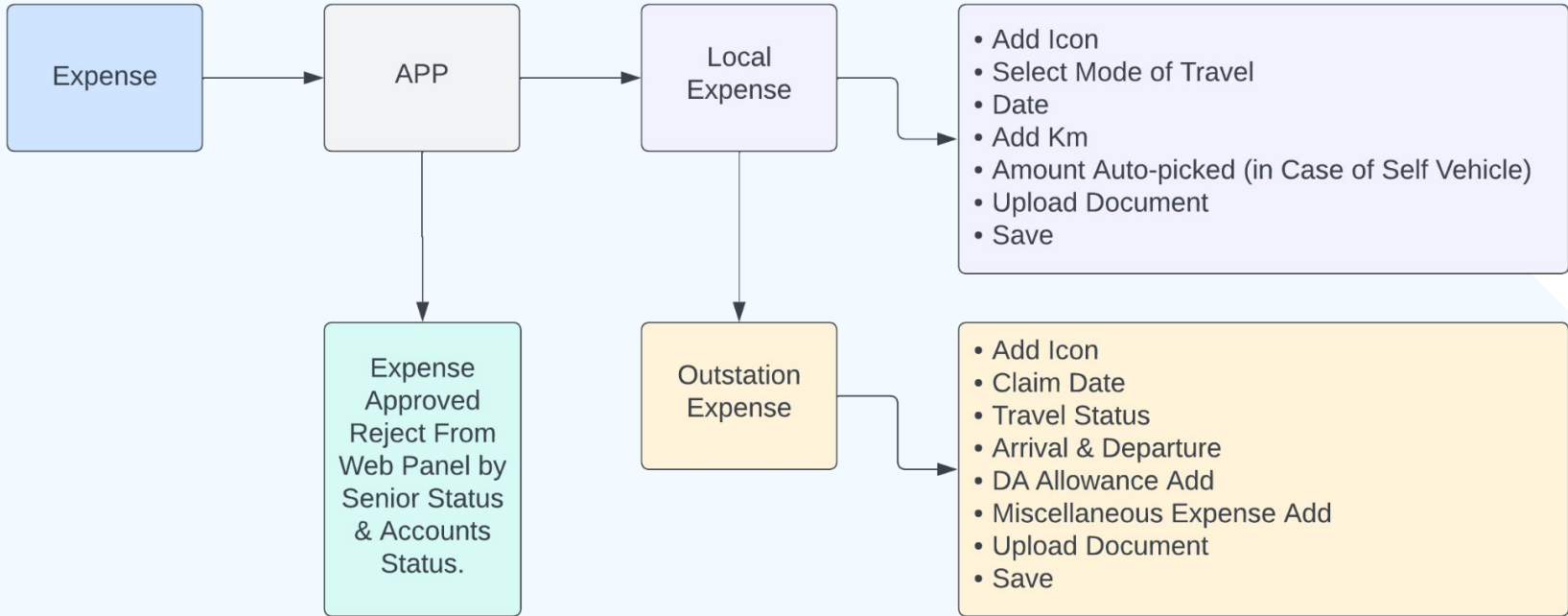
- Select the travel mode.
- Add the date and locations (start and end).
- Manually enter the kilometers traveled.
- Add any miscellaneous details and the amount.
- Upload the bill image and submit.

## To Add Outstation Conveyance Expense

- Add the claim date.
- Specify travel entitlement and mode.
- Add travel dates with stations and amounts.
- Include local conveyance details.
- Add daily allowance and miscellaneous expenses.
- Upload bill images and submit the expense.

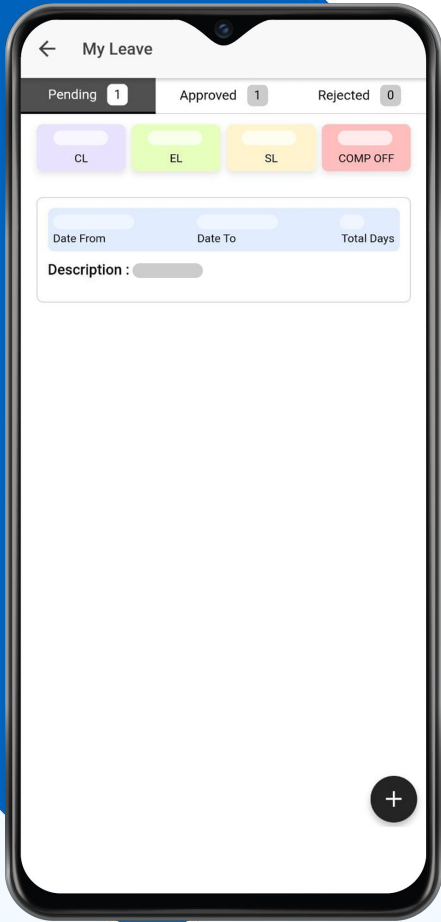
### **Note:**

If a follow-up is created for a date that already has a scheduled follow-up (e.g., June 25th), the user must adjust either the date or the timing to accommodate the new follow-up. This ensures clarity and prevents scheduling conflicts within the application.



## Reporting Manager Access

A Reporting Manager, responsible for overseeing sales users, has access to view both their own and their team members' POP & gifts, travel plans, and expenses, ensuring comprehensive management and oversight.



# Leave Management in Application

# Application for Leave

Users can apply for leave through the application, which supports several types of leaves:

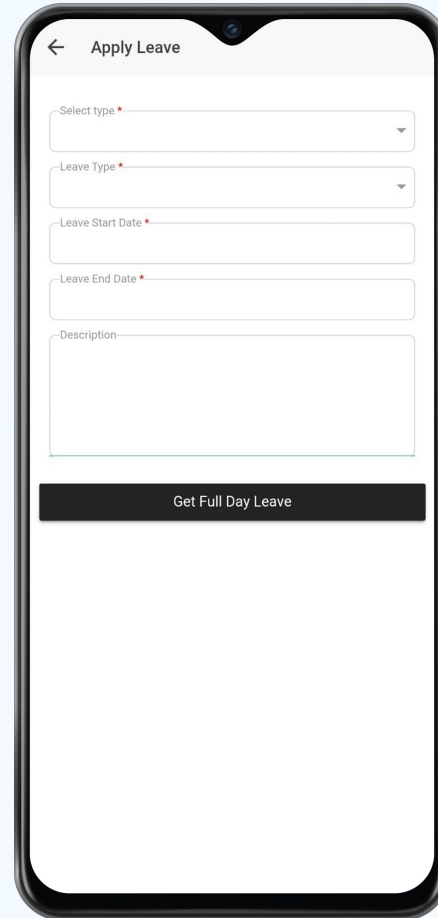
**Casual Leave (CL)**

**Earned Leave (EL)**

**Sick Leave (SL)**

**Company Off (Comp Off)**

Seniors, managers, or system users determine the number of leaves a user can take for each type.



The image shows a smartphone screen displaying a form titled "Apply Leave". The form includes the following fields:

- "Select type" dropdown menu
- "Leave Type" dropdown menu
- "Leave Start Date" text input field
- "Leave End Date" text input field
- "Description" text area

At the bottom of the form, there is a black button labeled "Get Full Day Leave".

## Steps to Apply for Leave

- Tap the add icon and select whether it's for a half-day or full-day leave.
- Choose the type of leave.
- Set the start and end dates for the leave.
- Provide a description for the leave application.
- Submit the application for review.

## Reporting Manager Access

A Reporting Manager can view their own leave status as well as those of their team members.

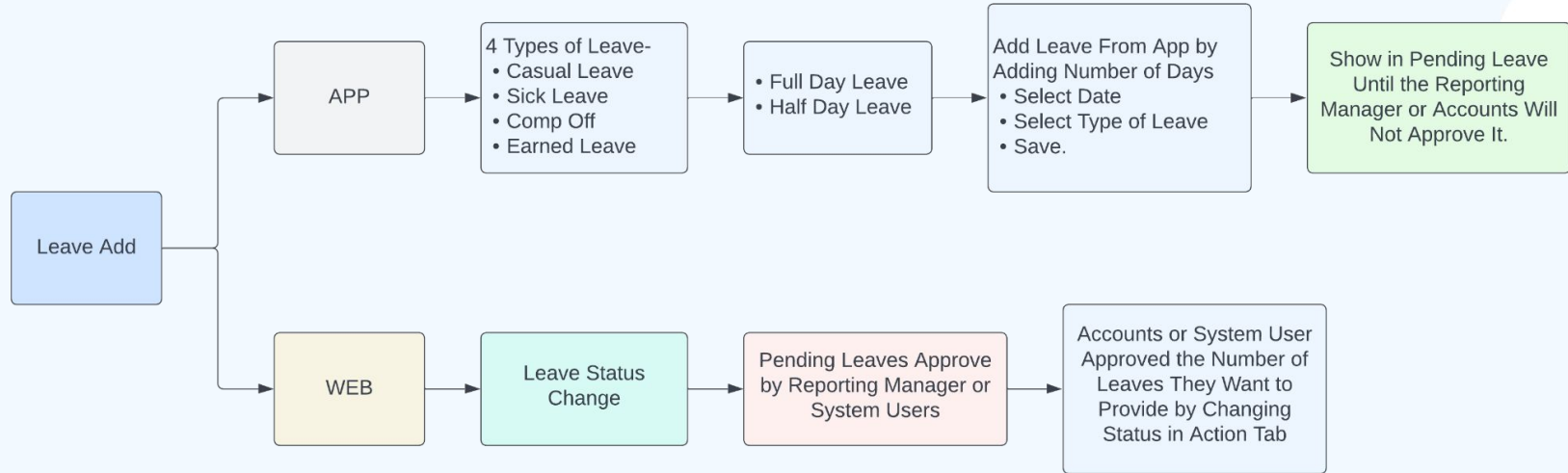
### **Note:**

The application prevents duplicate leave entries on the same date. Users need to select an alternative date if a leave request for the desired date already exists.

## Leave Request Status

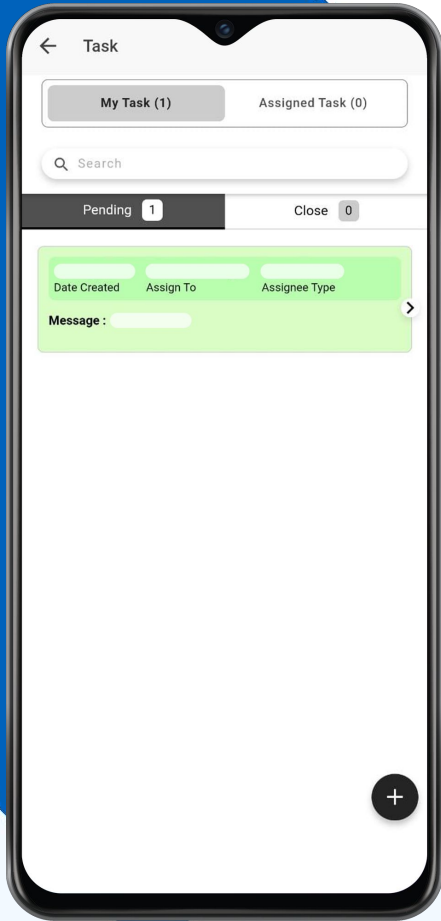
- 🟡 **Pending:** Leaves awaiting approval.
- ✅ **Approved:** Leaves approved by seniors.
- ❌ **Rejected:** Leaves rejected by seniors.

# Leave Application Process Flow



## Reporting Manager Access

A Reporting Manager can view their own leave status as well as those of their team members.



# Task Management in Application

## Overview

Tasks are assigned to users who must complete them by a specified promise date.

## Creating a Task

- Use the add icon to select the assignee for the task.
- Set the promise date by which the task must be completed.
- Include a remark for context.
- Attach an image if necessary.
- Save the task.

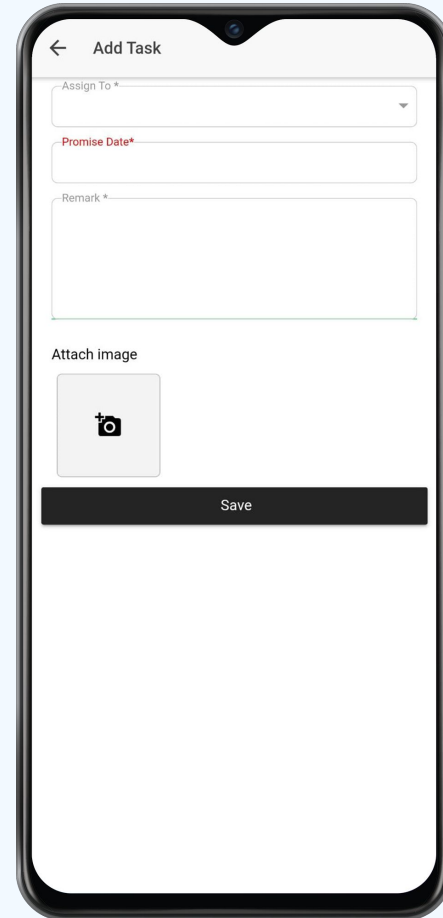
## Task Tabs

### My Task

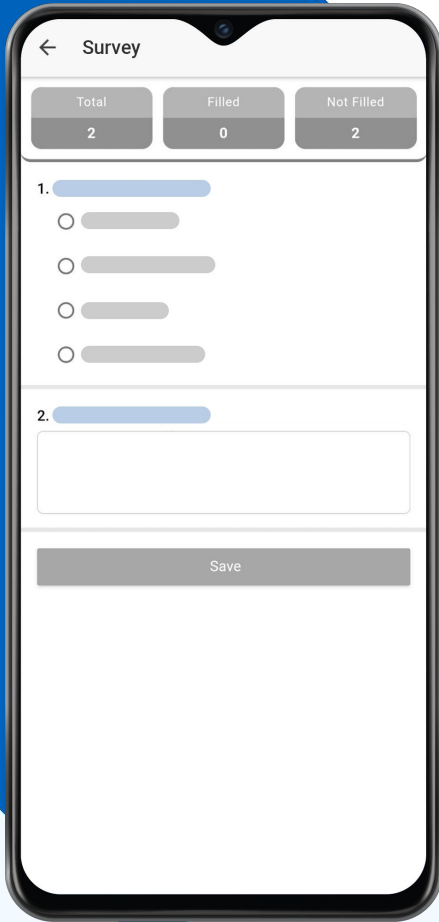
Displays tasks assigned to the user.

### Assigned Task

Shows tasks the user has assigned to others.







# Survey Implementation in Application

## Purpose

Surveys are conducted to collect information based on a series of questions to understand public opinion or behavior.

## Adding Surveys

- Surveys are added by system users, seniors, or sub-admins.
- Once survey questions are answered through the application, the responses are displayed on the panel.

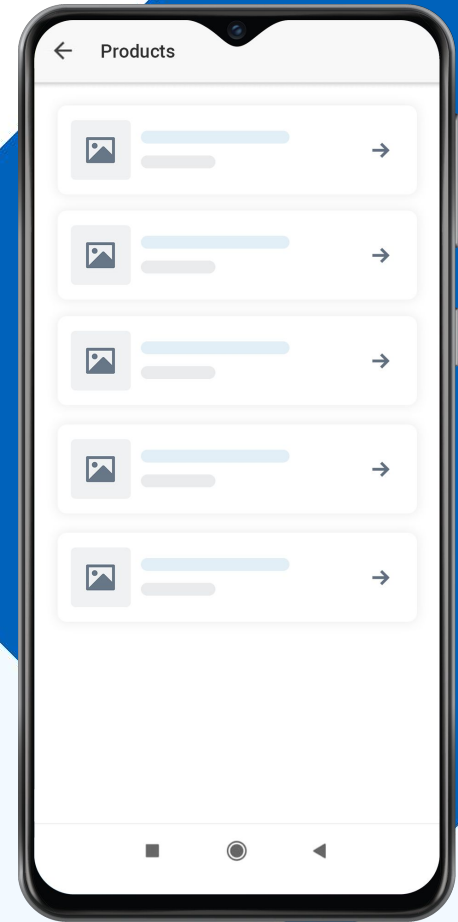
# Product Listing and E-Catalogue

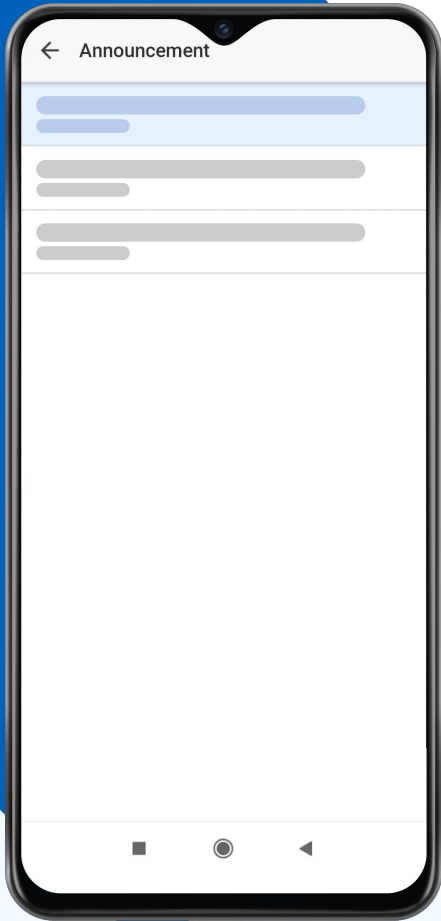
## Products

The product module lists all products with images and prices.

## E-Catalogue

Catalogues related to the company, including products, banners, and prices, are uploaded in PDF format.



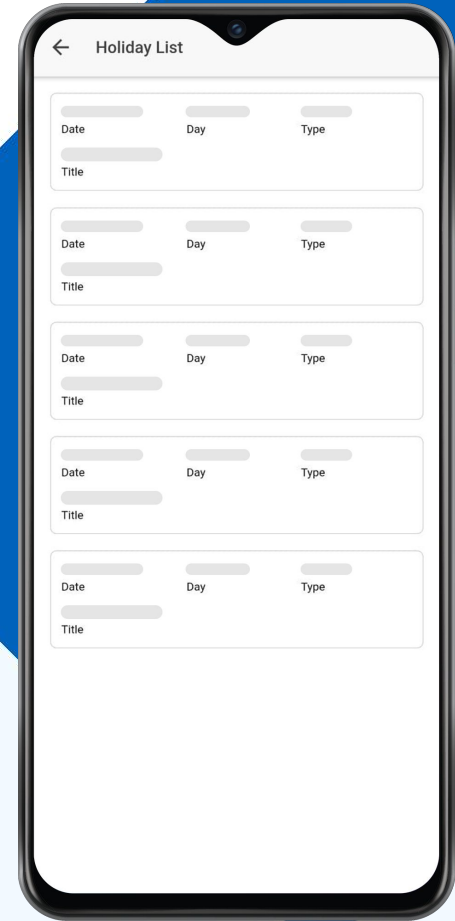


## Announcement

System users, seniors, or managers can make announcements through the system. These are then directed to the intended users within the application.

# Holidays

The holidays module lists the number of holidays in a specific month, categorized by province or internationally, and is accessible to users within the application.



# BASIQ/360°

SENDER DETAILS



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