:eybii

Salesman Tracking and Ordering

KEEP TRACK OF SALES REPRESENTATIVES IN REAL-TIME

Why Salesman Tracking & Ordering?

- ✓ Sales and Business Development executives are key to the success of any business as they are the frontline force generating business for the company

- ✓ Proper tracking of salespersons can help companies in:
  - ✓ **Increased productivity**. Effective tracking can assist the sales management to increase productivity tremendously
  - ✓ Reimbursements – **Proper tracking of expenses and reimbursements**
  - ✓ Monitoring **real-time locations**
  - ✓ Analysing **employee behavior**
  - ✓ **Real-Time Orders** right at the outlet for faster fulfillment

Better ROI with high level of Transparency, Efficiency and Accountability of field sales
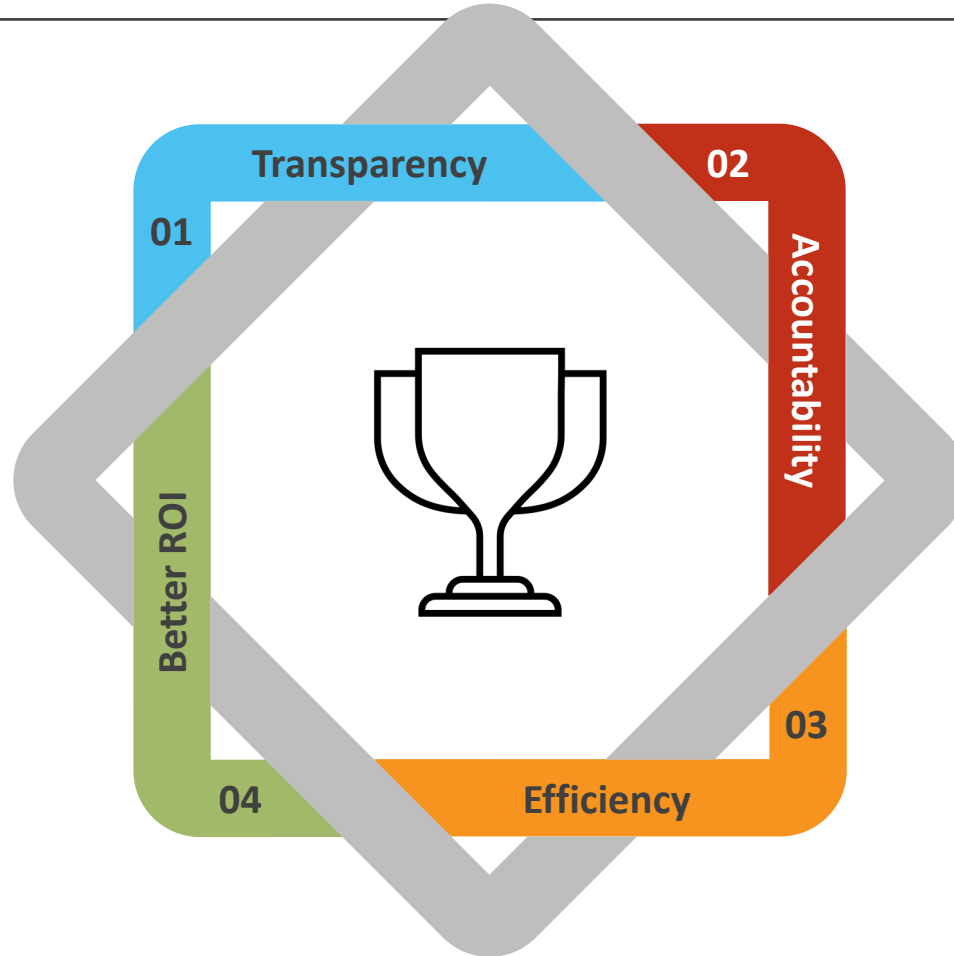
TRANSPARENCY

Real-Time visibility into daily customer visits, expenses, orders & new leads. Follow-Up reminders and tracking.

BETTER ROI

Higher target achievements, lower costs, faster order processing and higher sales target achievements

ACCOUNTABILITY

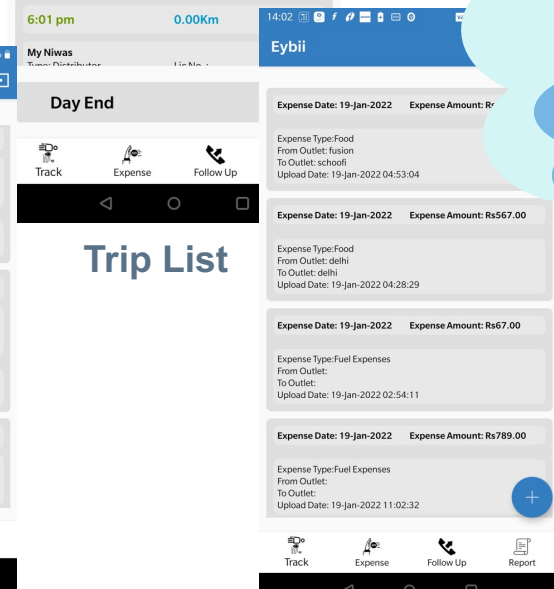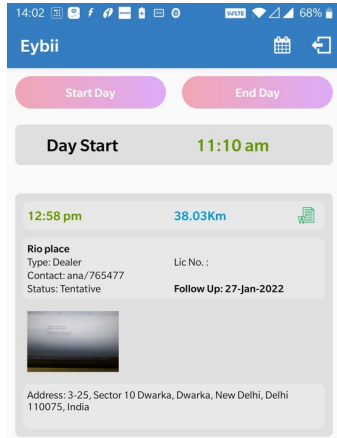360° visibility into daily activities, expenses, and orders. Tracking and analyse of performance across people

EFFICIENCY

Geo-Tagged expenses for easy verification and settlement. Faster deliveries and better customer sales with real-time orders

01 Transparency
02 Accountability
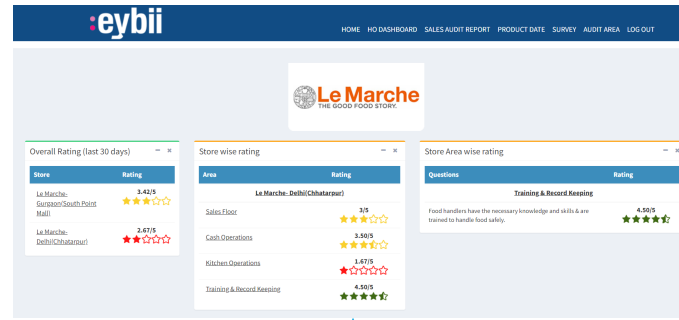**03** Efficiency
04 Better ROI

Key Features

- Real-Time Salesperson Tracking
  - Real-time visibility into salesperson location and checkins
  - Daily Trip sheet with location, address details of outlets visited, and the distance travelled

- Daily Expenses
  - Upload of expenses by salesperson like Hotel, Travel, Per-Diems, etc
  - Upload of associated bills
  - Real-time location data of the uploaded bills

- Real-Time Ordering
  - Upload outlet orders for your products right at the location
  - Real-Time visibility into uploaded orders to the ordering teams
  - Order summary by salesperson / date vs expenses incurred

- Site Surveys
  - Ability to create own surveys and questionnaires
  - Salespersons can fill those surveys during their meeting for better market understanding and insights

- Easy Integration with API's
  - API's to provide data about orders and expenses
  - Data available in XML / JSON / Excel formats

Architecture

HO Dashboards

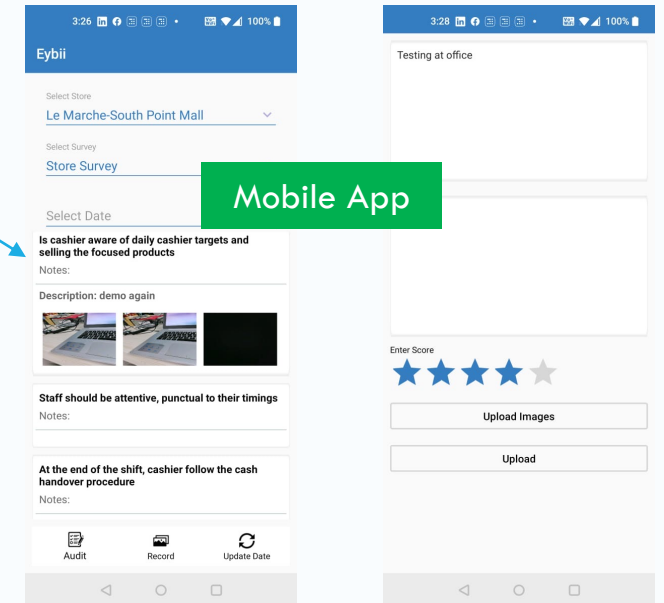**Admin/ Store Manager / Store Execs)**

User Authentication
(Encrypted Passwords/OTP based logins)

Secure API's over Cloud (https)

Integrated Backend
(MySQL / Core PHP / Python / Firebase)

Mobile App

Trip List

Follow-Ups

Expenses

**Store Exec /
Store Manager**

Audit Team

Daily Tracking

14:02

Eybii

| Start Day | End Day |

| **Day Start** | **11:10 am** |

| 12:58 pm | 38.03Km |

Rio place
Type: Dealer   Lic No. :
Contact: ana/765477
Status: Tentative   **Follow Up: 27-Jan-2022**

Address: 3-25, Sector 10 Dwarka, Dwarka, New Delhi, Delhi 110075, India

| 6:01 pm | 0.00Km |

My Niwas
Type: Distributor   Lic No. :

| **Day End** | |

Track   Expense   Follow Up   Report

Expenses

Follow-Ups

14:03

Eybii

18-Jan-2022 3:30 pm

demo
Type: Retailer   Lic No. :
Contact: /987654333
Status: Future Order

Address: 12, B Block, Sector 70, Noida, Uttar Pradesh 201307, India

18-Jan-2022 3:30 pm

Type: Dealer   Lic No. :
Contact:
Status: Future Order

Address: 12, B Block, Sector 70, Noida, Uttar Pradesh 201307, India

18-Jan-2022 3:30 pm

Smwork login/aa22dd
Type: Distributor   Lic No. :
Contact: anna/222222
Status: Future Order

Track   Expense   Follow Up   Report

Orders

14:03

Eybii

7inkBrews Smooth Lager 500 ML
Quantity: 78
TEST OL 2/1
Order Date: 21-Jan-2022
Tentative Delivery Date: 22-Jan-2022

7inkBrews Smooth Lager 650 ML
Quantity: 56
TEST OL 2/1
Order Date: 21-Jan-2022
Tentative Delivery Date: 22-Jan-2022

Expenses

Expense Date: 19-Jan-2022   Expense Amount: Rs67.00

Expense Type:Food
om Outlet: fusion
Outlet: schoofi
load Date: 19-Jan-2022 04:53:04

Expense Date: 19-Jan-2022   Expense Amount: Rs567.00

Expense Type:Food
om Outlet: delhi
Outlet: delhi
load Date: 19-Jan-2022 04:28:29

Expense Date: 19-Jan-2022   Expense Amount: Rs67.00

Expense Type:Fuel Expenses
om Outlet:
Outlet:
load Date: 19-Jan-2022 02:54:11

Expense Date: 19-Jan-2022   Expense Amount: Rs789.00

Expense Type:Fuel Expenses
om Outlet:
Outlet:
load Date: 19-Jan-2022 11:02:32

Track   Expense   Follow Up   Report

Analysis Reports

- ✓ Daily Trip Sheet with
    - ✓ Kms covered,
    - ✓ Outlets visited,
    - ✓ Expenses incurred, and
    - ✓ Orders generated

- ✓ Expense Details (within Date Range)

- ✓ Orders

- ✓ Other reports as required by the client

Report Samples

S.No	Outlet	Date Time	Contact Person	Contact Person Number	Map Address	Outlet Type	User Address	Latitude	Longitude	Location Images	Question: Answer
1	Vinayak Agency 0000	04/05/22 18:05	Vinay kapoor	9.17008E+11	Q5P2+WMH, Koshi Parikarma Marg, Gudri Bazar, Faizabad, Uttar Pradesh 224001, India	Distributor	Q5P2+WMH, Koshi Parikarma Marg, Gudri Bazar, Faizabad, Uttar Pradesh 224001, India	26.7873072	82.1515812	Image-1 Image-2	
2	Mehboob beauty Bazar 0000	06/05/22 15:48	Mehboob bhai	7007348445	R8JH+4PF, Zaidpur, Uttar Pradesh 225414, India	Distributor	R8JH+4PF, Zaidpur, Uttar Pradesh 225414, India	26.8303373	81.3291116	Image-1	
3	jitendra Suhag Mahal 000000	09/05/22 14:26	jitendra kumar	0	401, Sector 14, Vikas Nagar, Lucknow, Uttar Pradesh 226022, India	Retailer	401, Sector 14, Vikas Nagar, Lucknow, Uttar Pradesh 226022, India	26.9030623	80.9552065	Image-1	
4	Arsh chudi Center 000	09/05/22 14:42	Faisal	6386373516	Rahamat Plaza 2nd Floor Near I Next Hospital Tehli Puliya Krusi Road, Tehri Puliya, Sector 14, Vikas Nagar, Lucknow, Uttar Pradesh 226021, India	Retailer	Rahamat Plaza 2nd Floor Near I Next Hospital Tehli Puliya Krusi Road, Tehri Puliya, Sector 14, Vikas Nagar, Lucknow, Uttar Pradesh 226021, India	26.9075926	80.9563198	Image-1	

	A	B	C	D
	Salesman Name	**Expense Date**	**Expense Type**	**Expense Amount**
	SM Test	02/05/22	Fuel Expenses	500
	SM Test	02/05/22	Hotel	200
	SM Test	02/05/22	Per Diems	200
	SM Test	03/05/22	Hotel	100

Case Study

Case study

Tracking field sales representatives for better sales outcomes

Challenge

Tracking field sales representatives and mobile workforce across the country

- Daily visits and leads
- Daily expenses
- Travel patterns and routes
- Transparency and Productivity at top

Solution

Implemented eybii salesman tracking system to

- Track Salesperson daily attendance and visits with geo-tagged pictures
- Daily Expense entry by salespersons with bill upload
- Real-Time visibility into salesperson location

Results

65K+ Check-ins

200 Salespersons tracked / day

200+ Leads

Daily Leads and regular customer visits

3400+ Follow-Ups

Better conversions with regular Follow-ups and tracking

9700+ Expense Claims

Expense claims with system calculated kms travelled

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