



Field Sales Management Application

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KALPATARU[®]
— F O R L I F E —

Project Description



“KALPATARU” is one of the fastest growing Laminates brands of India have a large field sales force. The customer wanted an application to help their executive staff manage information on customers and orders, targets versus achievements.

Our application provides functionality to sales officers prepare Journey plan & Sales plan for each month, Tracking by Sales officer through Geo google Map; field staff capture random selfie for location spot confirmation, Prepare Business Expansion / Penetration reports based on Compulsory Journey Plan (CJP), Manage lead, follow up, meetings to generate productive / non-productive calls report.

Using this application user can easily manage customer, orders and collections, site location information, customer journey plan based on nearest location suggestion, achieved and assigned monthly target, keep track of punch in-punchout logs, etc.



Key Features

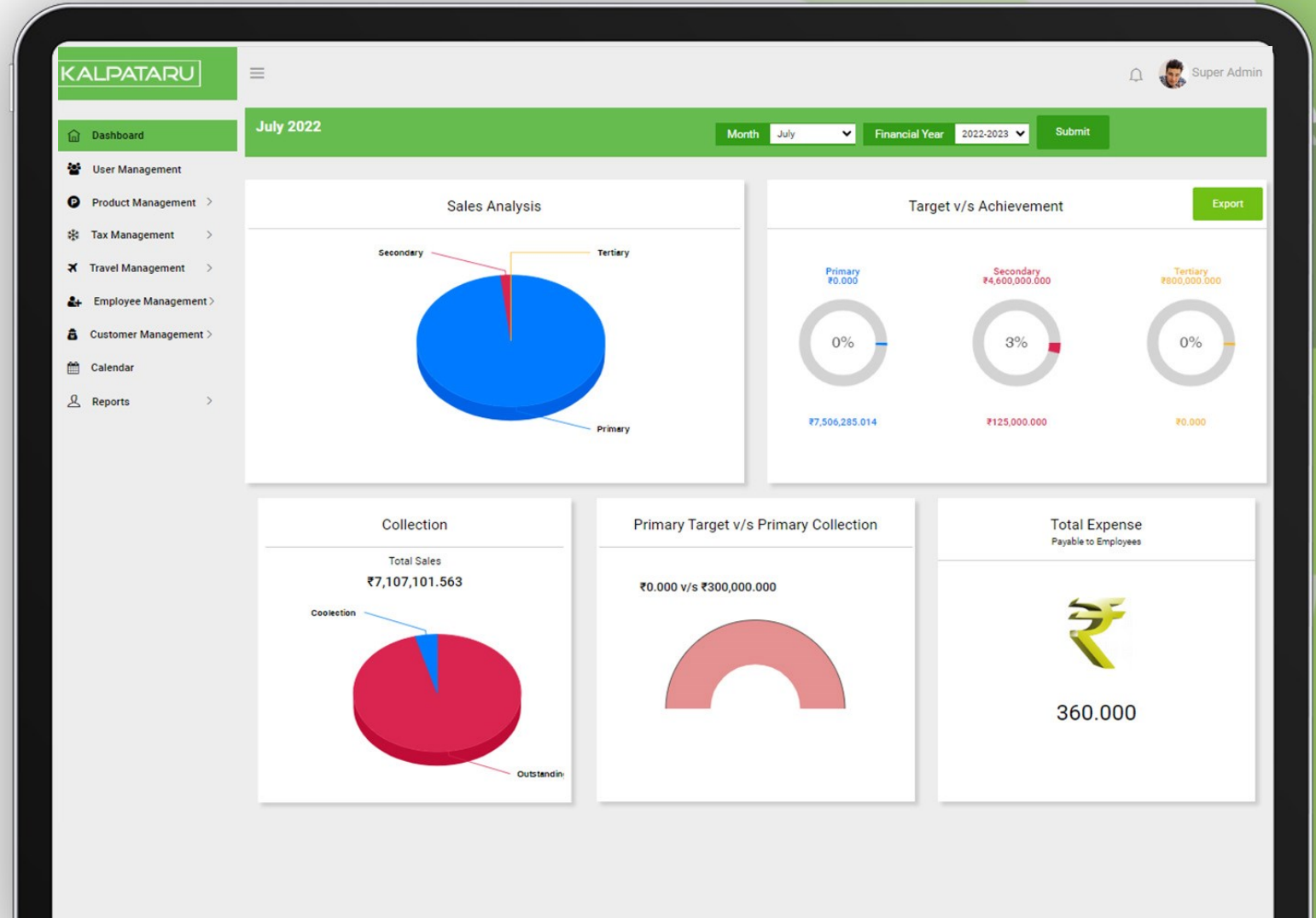


- Manage Users, Hierarchy and Roles: 100+ Sales Officers, 20+ Managers, 10+ Regional Managers, 2+ Zonal Managers & 20+ Administrative staff
- Manage more than 10,000 customers (Retailers, wholesalers, carpenters & Architects) spread all over India
- Sales officers prepare Journey plan & Sales plan for each month
- System to generate target vs achievement report based on monthly plan & actual achievements
- Manage travel allowance, daily allowance & daily expenses as per company policies

- Tracking by Sales officer through Geo google Map; field staff capture random selfie for location spot confirmation
- Prepare Invoices based on orders from customers / Sales officers
- Manage leaves as per company policy
- To prepare Business Expansion / Penetration reports based on Compulsory Journey Plan (CJP)
- Manage lead, follow up, meetings to generate productive / non-productive calls report
- Manage Reminders & Notifications

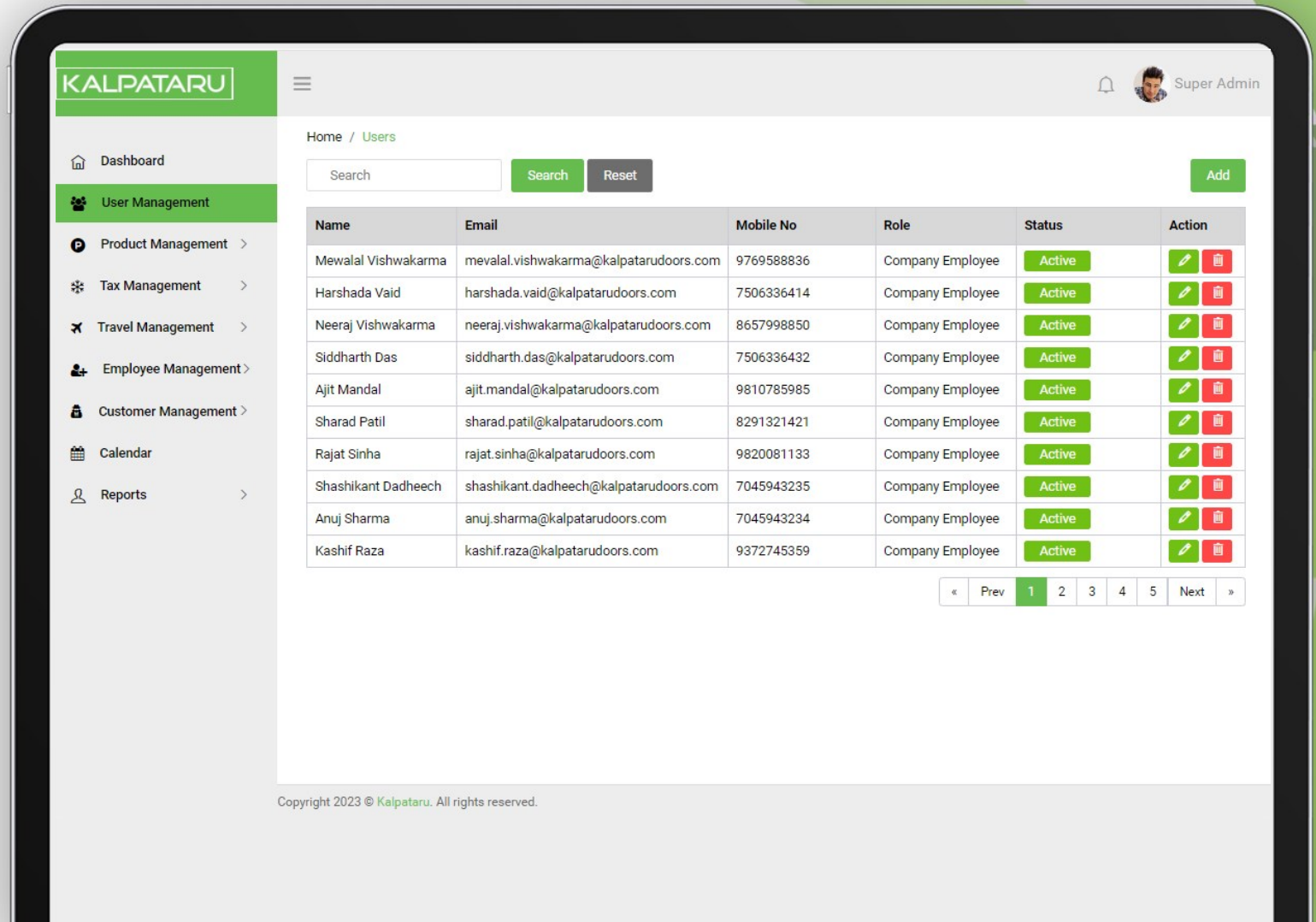


- A visual representation of sales distribution.
- Compare set sales targets with the actual achievements to measure the efficiency and effectiveness of the sales team.
- Understand how much of your booked orders have been successfully collected
- Highlights the difference between the main collection objectives.
- An overview of the overall costs associated with your sales force

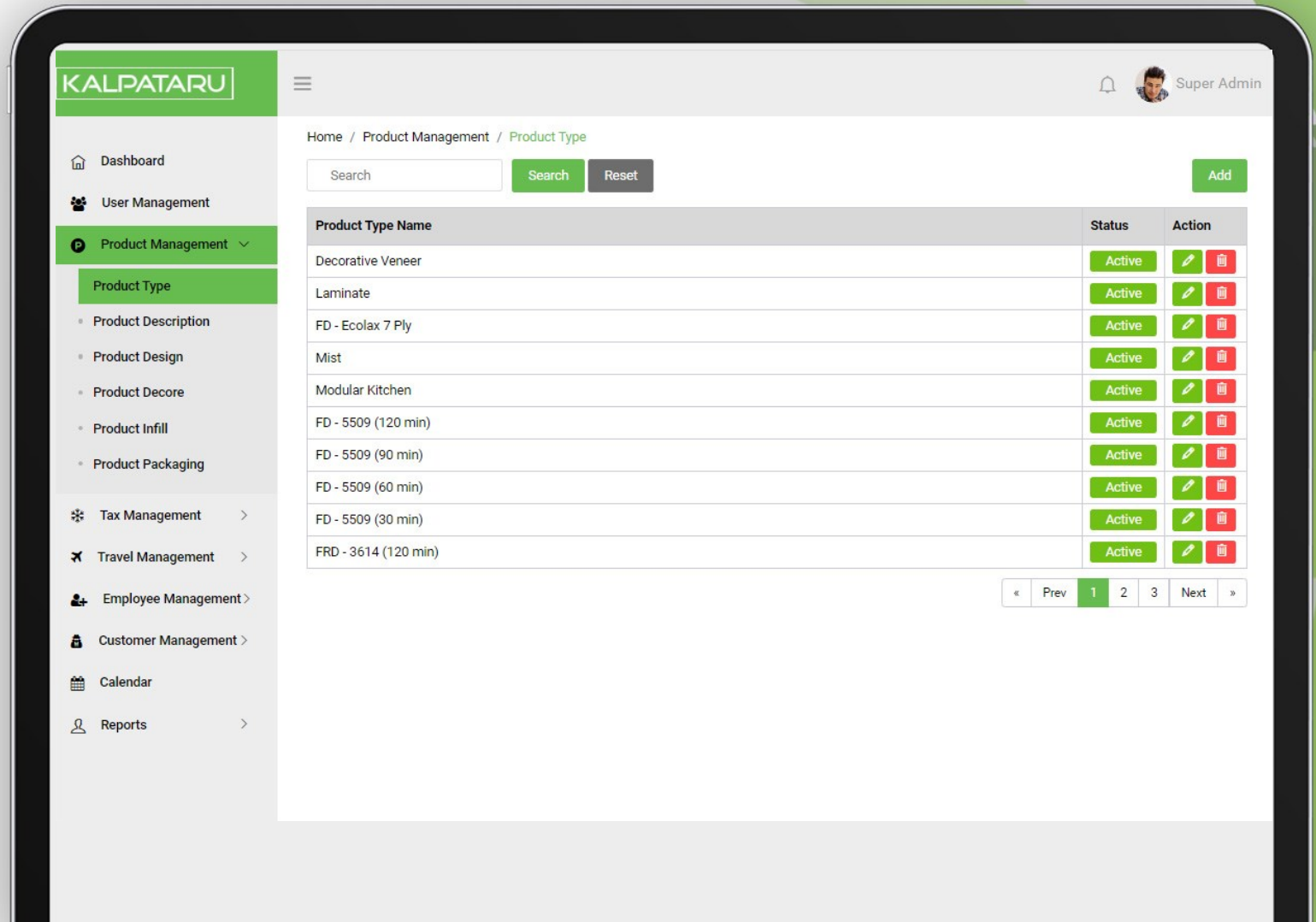


User Management

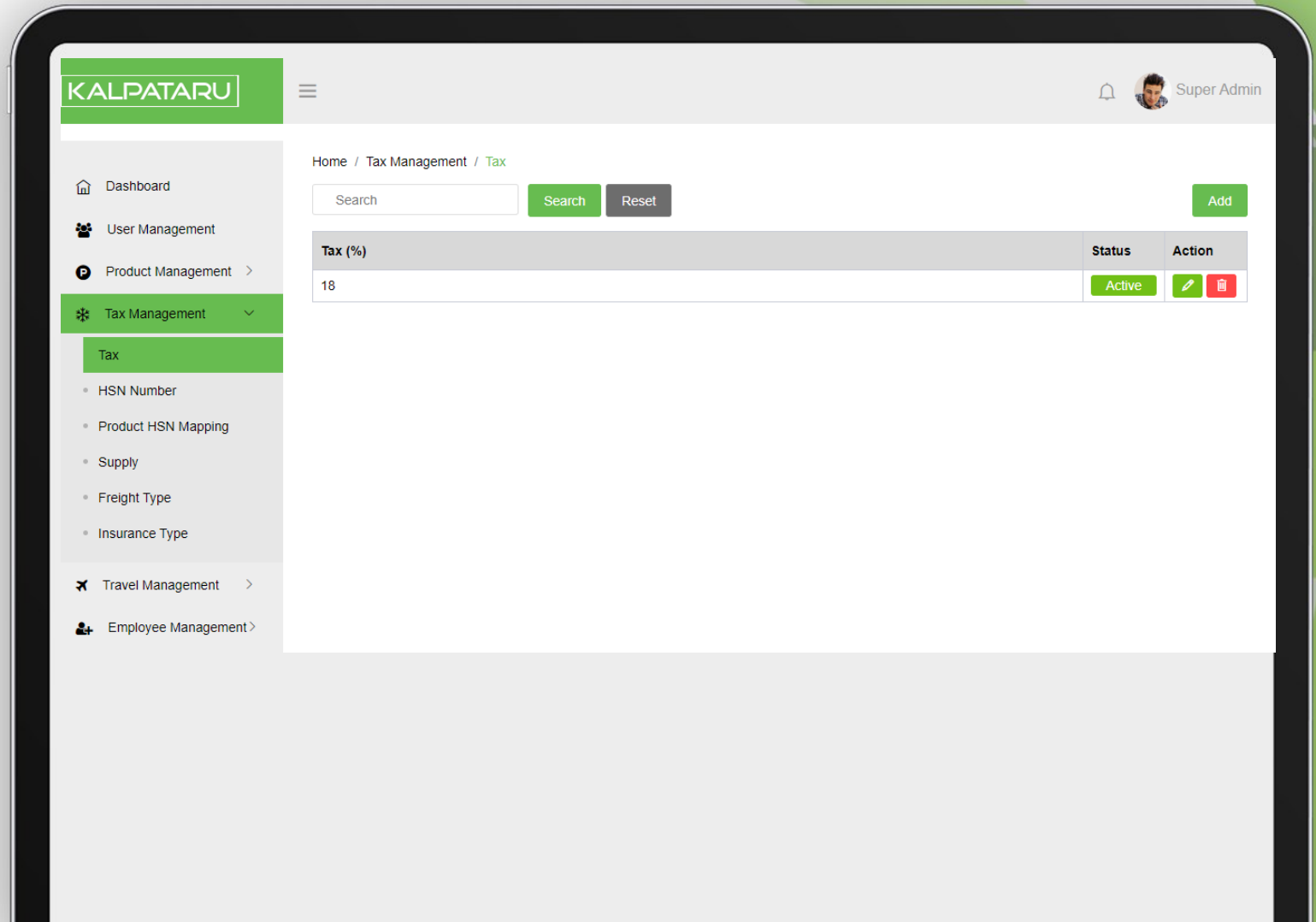
- Easily add, modify, or remove users, ensuring controlled access and customized roles within your platform.
- Maintain security and streamline user interactions seamlessly.



- Easily manage and customize your products with our comprehensive feature.
- Choose from multiple masters in type, design, decor, infill, and packaging to tailor your product to perfection.
- Streamline production and ensure consistency across your range.



- Easily navigate complex tax scenarios with multiple master of tax options.
- Seamlessly integrate HSN numbers and ensure accurate product-HSN mappings.
- Simplify your tax processes and ensure compliance effortlessly.



- Manage your team's travels with transport mode master.
- Set clear guidelines with our travel and food allowance policies based on employee grade.
- Manage number of combinations for lodging and boarding experiences during UPC and local travel as well.

The screenshot displays the Kalpataru Travel Management web application. The left sidebar contains a navigation menu with options: Dashboard, User Management, Product Management, Tax Management, Travel Management (selected), Employee Management, Customer Management, Calendar, and Reports. Under Travel Management, there are sub-options: Allowance Type, Transport Mode, Travel Allowance Policy, Lodging & Boarding (highlighted), Food Allowance during UPC Journey, and Allowance Hours. The main content area shows the 'Lodging & Boarding' page with a breadcrumb trail: Home / Travel Management / Lodging & Boarding. It includes a search bar, a table of data, and a pagination control.

| Grades | Town Classifications | Allowance Type | Maximum Lodging | Maximum Boarding | Fixed Allowance | Status | Action |
|--------|----------------------|----------------|-----------------|------------------|-----------------|--------|--------|
| SM 4 | C | Company | 6000 | 1800 | | Active | |
| SM 4 | B | Company | 6500 | 2000 | | Active | |
| SM 3 | C | Company | 6000 | 1800 | | Active | |
| SM 3 | B | Company | 6500 | 2000 | | Active | |
| SM 2 | C | Company | 6000 | 1800 | | Active | |
| SM 2 | B | Company | 6500 | 2000 | | Active | |
| SM 3 | A | Company | 7500 | 2500 | | Active | |
| SM 2 | A | Company | 7500 | 2500 | | Active | |
| SM 1 | C | Company | 6000 | 1800 | | Active | |
| SM 1 | B | Company | 6500 | 2000 | | Active | |

« Prev 1 2 3 4 5 6 7 8 9 Next »

Employee Management



- Easily streamline and organize your team's details and roles.
- Centralize basic & contact detail, work data, designation, product function, grade and assigned work area.
- Enhance productivity and ensure seamless communication for optimal workforce management.

The screenshot displays the KALPATARU Employee Management interface. On the left is a sidebar with navigation options: Dashboard, User Management, Product Management, Tax Management, Travel Management, Employee Management (selected), and Customer Management. Under Employee Management, there are sub-options: Employee, Employee Grade, Employee Designation, Town Classification, Head Quarter, Leave, Employed By, and Employee Notification. The main content area shows a table of employees with the following columns: Employee Code, Employee Name, Reporting To, Designation, Customer Type, Customer Count, and Action. The table lists 11 employees, including Alpesh Patel, Tamal Sinha, Kashi Nath Chatterjee, Harshada Vaid, Neeraj Vishwakarma, Siddharth Das, Abhijit Das Gupta, Ajit Mandal, Sharad Patil, Rajat Sinha, and Shashikant Dadheech. Each row has a 'view' link and edit/delete icons in the Action column. The top right of the interface shows the user 'Super Admin' and a search bar with 'Search' and 'Reset' buttons.





















| Employee Code | Employee Name | Reporting To | Designation | Customer Type | Customer Count | Action |
|---------------|-----------------------|-------------------|-------------------------|--|----------------------|---|
| 9769210840 | Alpesh Patel | Abhay Shrivastava | Plant Head | | view | edit delete |
| 7096104112 | Tamal Sinha | Abhay Shrivastava | Plant Head | | view | edit delete |
| 9769347886 | Kashi Nath Chatterjee | Abhay Shrivastava | Plant Head | | view | edit delete |
| 71TH0308 | Harshada Vaid | Abhay Shrivastava | Human Resource | Architect, Builder, C & F, Carpenter, Contractor, Corporation, Dealer, Distributor, Dummy, Educational Institution, End Customer, Government Body, Central, Government Body, Local, Government Body, State, Hospital, Housing Board, Housing Society, Interior Designer, Local Self Government, Manufacturer, Municipal Corporation, Municipal Council, OEM, Others, Private Limited, Public Limited, Retailer, Showroom, Supplier | view | edit delete |
| 21NK0311 | Neeraj Vishwakarma | Hemanshu Oza | Dy. Area Head | Architect, Builder, C & F, Carpenter, Contractor, Corporation, Dealer, Distributor, Educational Institution, End Customer, Government Body, Central, Government Body, Local, Government Body, State, Hospital, Housing Board, Housing Society, Interior Designer, Local Self Government, Manufacturer, Municipal Corporation, Municipal Council, Others, Private Limited, Public Limited, Retailer, Showroom, Supplier | view | edit delete |
| 21BH0133 | Siddharth Das | Abhijit Das Gupta | Area Head | Architect, Builder, C & F, Carpenter, Contractor, Corporation, Dealer, Distributor, Educational Institution, End Customer, Government Body, Central, Government Body, Local, Government Body, State, Hospital, Housing Board, Housing Society, Interior Designer, Local Self Government, Manufacturer, Municipal Corporation, Municipal Council, Others, Private Limited, Public Limited, Retailer, Showroom, Supplier | view | edit delete |
| 21KT0259 | Ajit Mandal | Abhijit Das Gupta | Sr. Territory Executive | Architect, Builder, C & F, Carpenter, Contractor, Corporation, Dealer, Distributor, Educational Institution, End Customer, Government Body, Central, Government Body, Local, Government Body, State, Hospital, Housing Board, Housing Society, Interior Designer, Local Self Government, Manufacturer, Municipal Corporation, Municipal Council, Others, Private Limited, Public Limited, Retailer, Showroom, Supplier | view | edit delete |
| 21PU0295 | Sharad Patil | Abhay Shrivastava | Sr. Territory Executive | Architect, Builder, Corporation, Educational Institution, Government Body, Central, Government Body, Local, Government Body, State, Hospital, Housing Board, Housing Society, Interior Designer, Local Self Government, Manufacturer, Municipal Corporation, Municipal Council, Private Limited, Public Limited | view | edit delete |
| 9820081133 | Rajat Sinha | Abhay Shrivastava | Zonal Head | Architect, Builder, C & F, Carpenter, Contractor, Corporation, Dealer, Distributor, Educational Institution, End Customer, Government Body, Central, Government Body, Local, Government Body, State, Hospital, Housing Board, Housing Society, Interior Designer, Local Self Government, Manufacturer, Municipal Corporation, Municipal Council, Others, Private Limited, Public Limited, Retailer, Showroom, Supplier | view | edit delete |
| 21MU0165 | Shashikant Dadheech | Abhay Shrivastava | Zonal Head | Architect, Builder, C & F, Carpenter, Contractor, Corporation, Dealer, Distributor, Educational Institution, End Customer, Government Body, Central, Government Body, Local, Government Body, State, Hospital, Housing Board, Housing Society, Interior Designer, Local Self | view | edit delete |

Customer Management



- Easily add, modify, or remove customers.
- Centralize vital client information.
- View all details anytime

The screenshot displays the 'Customer Management' interface of the Kalpataru system. On the left is a sidebar menu with options: Dashboard, User Management, Product Management, Tax Management, Travel Management, Employee Management, and Customer Management (selected). Under 'Customer Management', there are sub-options: Customers (selected), Customers Mapping, Customer Type, Location Type, Customer Classification, Customer Designation, Market Expansion, and Site Closure Reason. The main content area shows a breadcrumb trail 'Home / Customer Management / Customers' and a search bar with 'Search' and 'Reset' buttons. Below this is a table of customers with columns: Action, Code, Company Name, Customer First Name, Customer Last Name, Customer Type, Mobile No., State, City, Area, and Address. The table contains 10 rows of customer data. At the bottom right of the table is a pagination control showing 'Prev', '1' (current page), '2', '3', '4', '5', '6', '7', '...', '238', 'Next', and '»'. The footer of the application shows 'Copyright 2023 © Kalpataru. All rights reserved.'

| Action | Code | Company Name | Customer First Name | Customer Last Name | Customer Type | Mobile No. | State | City | Area | Address |
|---|------------|----------------------------|---------------------|--------------------|---------------|------------|----------------|----------------|-------------------------|---|
|   | 9821860602 | Radheshyam interior | Radheshyam | Vishwakarma | Contractor | 9821860602 | Maharashtra | Thane | Thane | |
|   | 9619817421 | Jyoti Furniture | Anil | Yadav | Contractor | 9619817421 | Maharashtra | Mumbai | Chakala Midc | |
|   | 9867381164 | N/A | Ramashish | Vishwakarma | Contractor | 9867381164 | Maharashtra | Goregaon West | Goregaon (Mumbai) | |
|   | 9892980083 | Linkway Plywood | Jitendra | Patel | Retailer | 9892980083 | Maharashtra | Goregaon West | Bangur Nagar | |
|   | 8109990601 | Sai Builders & Developers | Palash | Garg | Builder | 8109990601 | Madhya Pradesh | Huzur | Bhopal | Old Kabar Khana |
|   | 9993672558 | R. M. Traders | Mahesh | Jain | Retailer | 9993672558 | Madhya Pradesh | Raghurajnagar | Satna Birla Vikas | |
|   | 9967462311 | Shailee Interiors | Sadashiv | Yadav | Contractor | 9967462311 | Maharashtra | Thane | Thane | 6th Floor |
|   | 9426006361 | Universal Home Decor P Ltd | Tejash | Sanandiya | OEM | 9426006361 | Gujarat | Ahmadabad City | Polytechnic (Ahmedabad) | 104, Shangri-La Arcade, 1st Floor |
|   | 9824199222 | Kiwa Modular n Kitchen | Rajeev | Pathak | OEM | 9824199222 | Gujarat | Ahmadabad City | Ambawadi (Ahmedabad) | F-2, Landmark Aptt, Above Bank of Maharashtra |
|   | 9730477176 | NBA Architects | Nakul | Bhavsar | Architect | 9730477176 | Maharashtra | Nashik | H P T College | |

- Access comprehensive insights with our reports: monitor unassigned customers, track travel expenses, review order and follow-up statuses, check leave and log details, compare target v/s achievement, and evaluate the CJP report.
- Export reports in .csv file format

Home / Order Report

Search ---Select Employee--- From Date To Date

Search Reset Export

| Employee | Customer | Order Number | Order Sourced | Order Date | Delivery Date | Total Amount |
|--------------|-------------|--------------------|----------------|-------------|---------------|---------------|
| Abhishek Jha | Amod Thakur | 21JA0256/0623/0001 | Physical Visit | 14-Jun-2023 | 14-Jun-2023 | 1,035,053.250 |

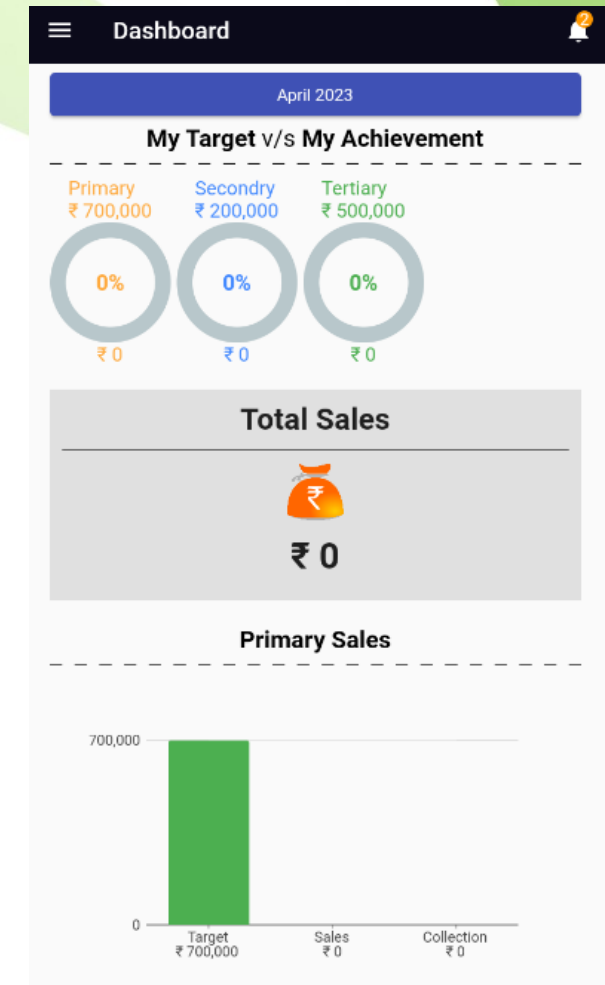
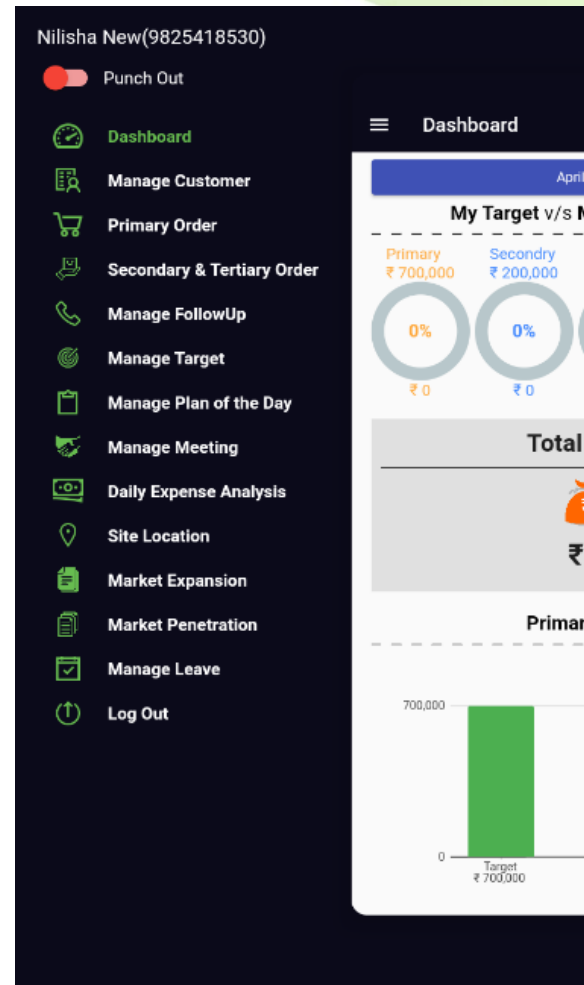
| Serial No | Product Type | Quantity | Unit | Thickness | Height | Width | Design | Decore | Rate | Discount Rate | Total Rate |
|-----------|---------------|----------------|--------------------|----------------|-------------|-------------|--------|-----------------------|-------------|---------------|---------------|
| 1 | RPD | 300 | 300 | 30 | 1950 | 700 | 3 POL | Rose Wood - 2010 - 62 | 877,163.742 | 0.000 | 1,035,053.220 |
| + | Ajay Gadodiya | Mohammad Huk | 21AK0301/0623/0001 | Physical Visit | 02-Jun-2023 | 02-Jun-2023 | | | | | 0.000 |
| | Abhishek Jha | Ashutosh Kedia | 21JA0256/0523/0001 | Physical Visit | 29-May-2023 | 29-May-2023 | | | | | 706,831.380 |
| | Abhishek Jha | Ashutosh Kedia | 21JA0256/0523/0001 | Physical Visit | 29-May-2023 | 29-May-2023 | | | | | 706,831.380 |
| | Abhishek Jha | Ashutosh Kedia | 21JA0256/0523/0001 | Physical Visit | 29-May-2023 | 29-May-2023 | | | | | 706,831.380 |
| | Abhishek Jha | Ashutosh Kedia | 21JA0256/0523/0001 | Physical Visit | 29-May-2023 | 29-May-2023 | | | | | 706,831.380 |
| | Abhishek Jha | Ashutosh Kedia | 21JA0256/0523/0001 | Physical Visit | 29-May-2023 | 29-May-2023 | | | | | 706,831.380 |
| | Abhishek Jha | Ashutosh Kedia | 21JA0256/0523/0001 | Physical Visit | 29-May-2023 | 29-May-2023 | | | | | 706,831.380 |
| | Abhishek Jha | Ashutosh Kedia | 21JA0256/0523/0001 | Physical Visit | 29-May-2023 | 29-May-2023 | | | | | 706,831.380 |
| | Abhishek Jha | Ashutosh Kedia | 21JA0256/0523/0001 | Physical Visit | 29-May-2023 | 29-May-2023 | | | | | 706,831.380 |
| + | Mukesh Sharma | Rahul Bansal | 21SL0238/0523/0001 | Physical Visit | 15-May-2023 | 25-May-2023 | | | | | 104,353.420 |

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Employee Login & Dashboard

- “KALPATARU” provides their filed salespersons an easy and productive application to slide their work digitally.
- Employee can login using their user credentials provided by Admin.
- On the dashboard they can see individual sales and target as well as the hierarchy levels.



Manage Customer

- Easily add, modify, or remove customers.
- Centralize vital client information.
- View all details anytime
- Reporting manager can see the new customer approval request and can take respective actions.

Manage Customer

Customers Customer Request

+ ADD CUSTOMER

Self

Search by name

Harsh Zala
Dealer
3794927283
Approved

Jigar Maru
Distributor
3498654376
Approved

Utkarsh Rawal
Contractor
9876553325
FD - 5509 (30 min)
Approved

Chirag Barot
Contractor
9887767665
FD - 5509 (120 min), FD - 5509 (30 min)
Approved

Create Customer

1 2 3 4 5 6

Code* : Mobile or landline no.

Customer Category* : Select Customer Category

Company Name* : N/A

Preferred Meeting Location : Select Location

Product Type : Select Product Type

Key Person Details

First Name* :

Last Name* :

Designation : Select designation

Gender : ☒ Male ☐ Female

Date of birth :

Anniversary date :

Next

Manage Primary Order

- Employee can place a new primary order with the item details and able to add multiple items under single project.
- Employee can have the rights to cancel order in such specific cases.

← Order Details

Chirag Barot

Add Payment

N/A

Cancel Order

Contractor

Order Date : 09-08-2023

Delivery Date : 09-08-2023

Order Number : 9825418530/0823/0001

Delivery To : Nilisha

Order Type : Primary

Delivery Address : 382445, Hathijan, Daskroi, Gujarat,

Total Amount : ₹ 1270.15

Payment : Outstanding -> ₹ 1,270.15

Block Board

Product Code :

Infill : Select Infill

Packaging : Select Packaging

Height : 10

Width : 10

Thickness : 010

Design : Select Product Desing

Decore : Select Product Decore

Quantity : 100

HSN Number : 0

CGST : ₹ 96.88

SGST : ₹ 96.88

Discount : ₹ 0

Total Amount : ₹ 1,076.4

← Create Primary Order

Order sourced through* : Select Order Source

Customer Name* : Search Customer Name

Customer Shop Name : Customer Shop Name

Customer Category : Customer type

Supply State* : Supply State

Order Date* : 28-08-2023

Order Number : 9825418530/0823/0002

Add Item

Delivery to* :

Address* : Select Address

Delivery Address* :

Delivery Date : 28-08-2023

Total Amount :

- Employee can keep track of payment collection logs for particular order.
- Different type of payment mode and related fields are provided for sufficient collection information.

← Add Payment Collection

Order No : 9825418530/0823/0001

Total : ₹ 1,270.15

Payment Date* :

28-08-2023

Payment Type :

Cash

Payment Amount* :

Remark :

SAVE

| Date | Amount | Type |
|-----------|------------|------|
| Total | ₹ 0 | |
| Remaining | ₹ 1,270.15 | |

- Employee can receive target from reporting manager on product bases and amount basis.
- Reporting manager can assign target to his employees based on sales type and amount.
- Based on order they can keep track of performance of the employee against assigned target.

Manage Target

Set Target

Target Receive

| Month | Target(lacs) | Action |
|----------|--------------|--------|
| Apr,2023 | 14.0 | |

| | Target Type | Amount(lacs) |
|---|-------------|--------------|
| + | Tertiary | 5 |
| + | Secondary | 2 |
| - | Primary | 7 |

| Type | Amount(lacs) | Unit |
|--------------------------------------|--------------|------|
| Block Board,FD - 5509 (120 min) | 2 | 500 |
| Decorative Veneer,FD - 5509 (30 min) | 5 | 50 |

Create Target

Target Type :

Primary

Target Month :

Aug 2023

Employee Name* :

Search Employee Name

Product Type* :

Select Product Type

Target amount* :

₹ Lacs

Target Unit* :

Pcs

Remark :

SUBMIT

Manage CJP & Meeting Outcome

- Employee can create customer journey plan for next month.
- Request for designed plan will be fire to reporting manager.
- Reporting manager can take necessary action and can keep eyes on live route compared to plan.

Manage Plan of the Day

My Daily Plan

Received Request

CREATE NEW

Sep-2023

Copy CJP

| | Date | Plans | View Map |
|---|------------|-------|----------|
| — | 01-09-2023 | 2 | |

| Customer | Type | Location | Status | Action |
|---------------|------------|----------------------|----------|--------|
| Chirag Barot | Contractor | Hathijan | Approved | |
| Utkarsh Rawal | Contractor | Ghodasar (Ahmedabad) | Rejected | |
| + | 02-09-2023 | 1 | | |
| + | 04-09-2023 | 1 | | |
| + | 05-09-2023 | 1 | | |
| + | 06-09-2023 | 2 | | |
| + | 07-09-2023 | 2 | | |
| + | 08-09-2023 | 1 | | |
| + | 09-09-2023 | 1 | | |
| + | 11-09-2023 | 3 | | |
| + | 12-09-2023 | 1 | | |
| + | 13-09-2023 | 1 | | |
| + | 14-09-2023 | 1 | | |
| + | 15-09-2023 | 2 | | |

Meeting Out Come

Date :

2023-09-05

Working In :

Sanand

Customer Name :

Harsh Zala

Customer Category :

Dealer

Duration :

Hours

:

Minutes

Employee :

Select Employee

Members of Meeting :

Employee not selected

Meeting Location* :

Outcome :

☒ Positive ☐ Negative

Lead Purpose :

Select Lead Purpose

Promotional Activity :

Select Promotional Activity

Meeting to add-as :

Select Meeting to add-as

Resolve Issue of :

Select Resolve Issue

Manage Local and Outstation Expense

- Employee can add expense records done by him during local travel or outstation.
- Employee can also add records for lodging and boarding with require details and attachments.

← Local HQ/UPC Local Travel

Date :

28-08-2023

Traveling City* :

Select Traveling City

Allowance Type* :

Select Type

Mode of Transport* :

Select Transport

KM Travel :

KM Travel

Total Expense Rate* :

Total Expense

Submit

← Create Expense

Travel From* :

28-08-2023

Travel To* :

28-08-2023

1 Days

Origin State* :

Select Origin State

Origin City* :

Select Origin City

Traveling State* :

Select Traveling State

Traveling City* :

Select Traveling City

Food Allowance During UPC Travel

Onwards

Duration* :

Select Duration

Rate* :

Return

Duration* :

Select Duration

Rate* :

Intercity Travel Allowance

- Employee can request for leave based on different type such as paid leave, casual leave or sick leave.
- Reporting manager will get request with all details and can take necessary action for leave request.

Manage Leave

My Leaves

Leave Requests

+ New Leave Application

| | Taken | Remaining |
|----|-------|-----------|
| PL | 1 | 17 |
| SL | 0 | 7 |
| CL | 0 | 5 |

Earlier Leaves

Leave Type

: PL

28-08-2023, Mon

Leave Status

: Pending

Days : 1

Manage Leave

My Leaves

Leave Requests

Earlier Leaves

Ilesh Patel

04-05-2023,Thu

Leave Type

: CL

Approved

×

Days

: 1

Ilesh Patel

04-05-2023,Thu

Leave Type

: PL

✓

×

Days

: 2

Ilesh Patel

04-05-2023,Thu

Leave Type

: CL

✓

×

Days

: 1

Ilesh Patel

04-05-2023,Thu

Leave Type

: CL

✓

×

Days

: 1



Adit Microsys Pvt. Ltd.

Thank You

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✉ web@aditmicrosys.com

