

This documents will guide a first time user regarding Cerrebro web system usage

# WEB MANUAL

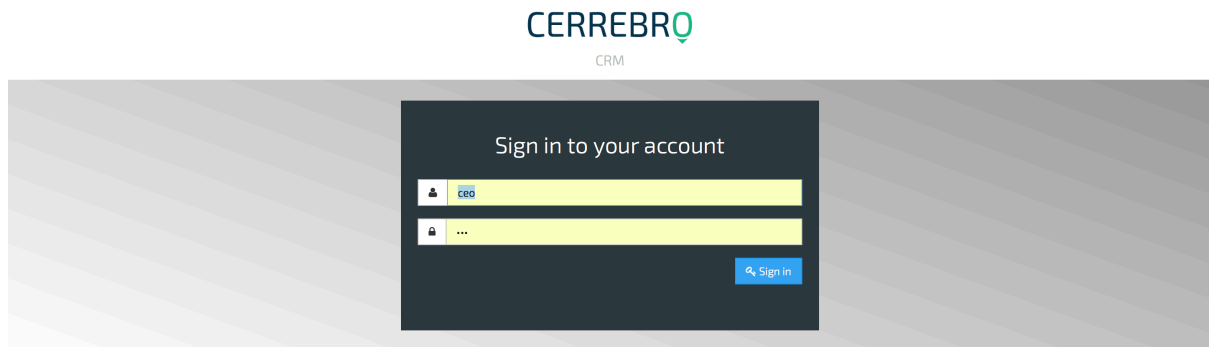
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## Logging into the Web System

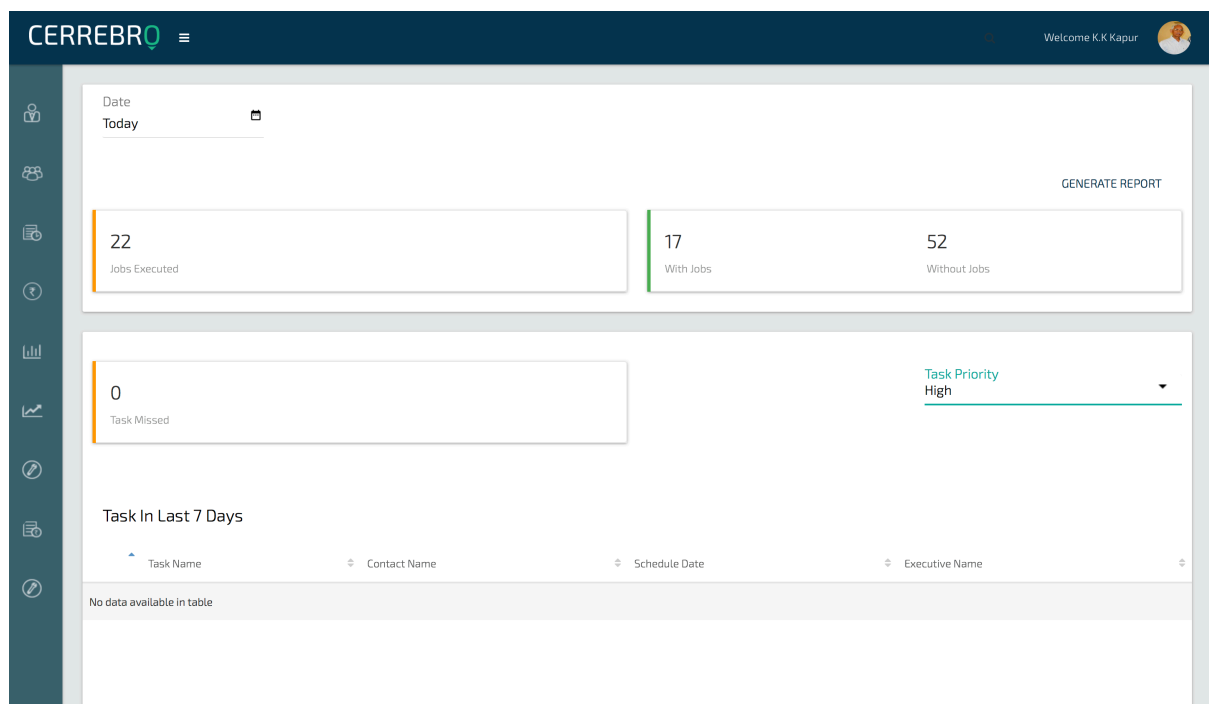
Go to [Cerrebro.com](https://Cerrebro.com). and click on the login button



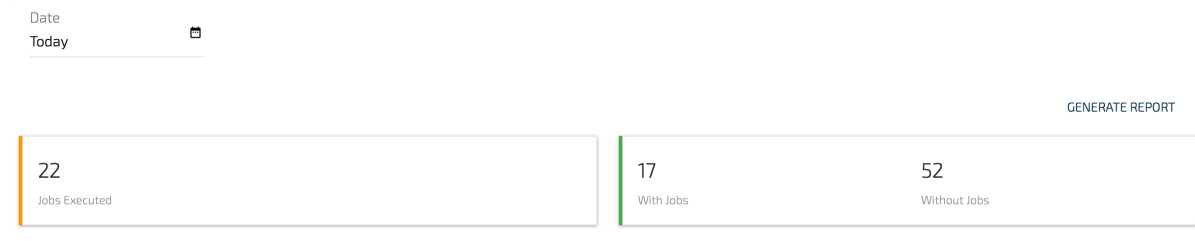
Enter your credentials as provided to you.

## Home Screen

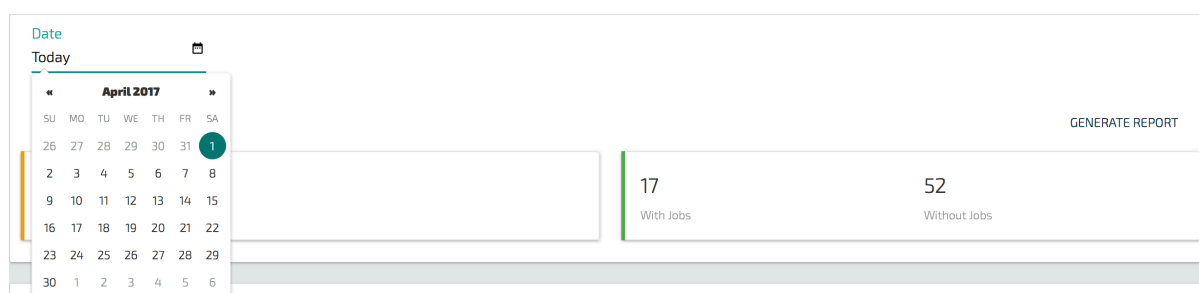
After clicking on sign in, the home page of your CRM system will open up.



1. Total jobs executed on a particular day
2. Number of executive who performed at-least one job
3. Number of executives who did not perform a single job



The date can be changed as required to get the figures for that day.



Click on generate report to generate a daily detailed report (Please open the picture separately to view in detail)

Manager Name	Executive Name	Contact Name	Contact Area	Type	Category	CIL	Schedule Date	Executed Date	Executed Via	Duration	Task Name	Creation Remarks	Execution Remarks	Is Completed
Anand Daxived	Anand Mohan Pandey	Tyre Tech	Jharkhand	Dealer	Primary	Customer	31 Mar 2017	31 Mar 2017	M	0 hours 52 mins	Others	No Remark	Sale discuss with party	Y.
	Deepak Khantwal	INDAG RUBBER LTD - BILASPUR (HP)	Himachal Pradesh	Indag Offices and Depot	Primary	Customer	31 Mar 2017	31 Mar 2017	M	0 hours 5 mins	Others	No Remark	sales closing	Y.
	PRABODH KUMAR PANDEY	GOOD LUCK TYRE	Bihar	Retreader	Primary	Lead	31 Mar 2017	31 Mar 2017	M	0 hours 52 mins	Routine Visit	No Remark	ok,	Y.
	Ramakant Das	INDAG RUBBER LTD - CUTTACK NEW	Orissa	Indag Offices and Depot	Primary	Customer	31 Mar 2017	31 Mar 2017	M	1 hours 35 mins	Routine Visit	No Remark	office	Y.
	Satyaj kinker kema	INDAG RUBBER LTD - CUTTACK NEW	Orissa	Indag Offices and Depot	Primary	Customer	31 Mar 2017	31 Mar 2017	M	2 hours 4 mins	Routine Visit	No Remark	Office work	Y.
Ashok Aggarwal	Sunaj Biswas	INDAG Rubber Limited	West Bengal	Indag Offices and Depot	Primary	Customer	31 Mar 2017	31 Mar 2017	M	2 hours 51 mins	Routine Visit	No Remark	Billing sales closing	Y.
	GHR.MOORTHY	Sri Sakthi Tyres namakkal	Tamil Nadu	Indag Offices and Depot	Secondary	Lead	31 Mar 2017	31 Mar 2017	M	0 hours 24 mins	Others	visit with GM, discussed abt sale and collection	assured to support	Y.
Briju Pillai	Rajesh Tripathi	Lucknow Tyre Lucknow	Uttar Pradesh	Dealer	Primary	Customer	31 Mar 2017	31 Mar 2017	M	0 hours 36 mins	Routine Visit	No Remark	working with Singla sir	Y.
	Deepak Khantwal	Satyam K Singh	NEW HIGHWAY RETREDAING	Punjab and Chandigarh	Retreader	Primary	Customer	31 Mar 2017	31 Mar 2017	M	1 hours 22 mins	Collect Order,Payment Collection,Routine Visit	No Remark.No Remark.No Remark	may be till evening,may be till evening,done
Praveen shingru	Anand Moghe	Indag Rubber Ltd Pune	Maharashtra	Indag Offices and Depot	Primary	Customer	31 Mar 2017	31 Mar 2017	M	0 hours 13 mins	Others	No Remark	Months closing	Y.
	Nashid Chaurasiya	Indag Rubber Ltd Pune	Maharashtra	Indag Offices and Depot	Primary	Customer	31 Mar 2017	31 Mar 2017	M	0 hours 1 mins	Others	No Remark	months close	Y.
Raja Ram K	DattatrayaB Tambe	SWATHI TYRES	Karnataka	Indag Offices and Depot	Primary	Lead	31 Mar 2017	31 Mar 2017	M	0 hours 39 mins	Others	No Remark	Meet the customer and discuss about N, use our product, customer has told will purchase Mangalore agencies.	Y.
	Sudheer kumar Donda	Indag Rubber Limited Vijaywada	Andhra Pradesh	Indag Offices and Depot	Primary	Customer	31 Mar 2017	31 Mar 2017	M	1 hours 31 mins	Routine Visit	No Remark	Month end billing	Y.
Rajaram Yadavalli	Yallandi Sreenarayulu	late tyre works	Andhra Pradesh	Indag Offices and Depot	Primary	Customer	31 Mar 2017	31 Mar 2017	M	0 hours 34 mins	Routine Visit	No Remark	fall up	Y.
	Om Srinivasa Traders	Om Srinivasa Traders	Andhra Pradesh	Indag Offices and Depot	Primary	Customer	31 Mar 2017	31 Mar 2017	M	0 hours 48 mins	Collect Order	No Remark	collect order 40000,using 2boxes	Y.
Rajiv Hazarika	Hareshwar Sakia	Indag rubber ltd	General	Indag Offices and Depot	Primary	Customer	31 Mar 2017	31 Mar 2017	M	0 hours 25 mins	Others	No Remark	calls made to maximum parties for order now proceeding to total proceed to Laxmi market	Y.
	Karmu Tyres	Karmu Tyres	North East India	Dealer	Primary	Customer	31 Mar 2017	31 Mar 2017	M	1 hours 38 mins	Collect Order	No Remark	order approx 4500 kg collected	Y.
RAMALINGAM RAMA	RAMALINGAM RAMA	EXCEL TREADS-pondy	Tamil Nadu	Retreader	Primary	Customer	31 Mar 2017	31 Mar 2017	M	1 hours 13 mins	Collect Order	No Remark	collect the order	Y.

Details regarding the task/meetings missed can be viewed from the second dashboard. One can filter the tasks by their criticality level

0

Task Missed

Critical

✓ High

Medium

Low

Task In Last 7 Days

Task Name

Contact Name

Schedule Date

Executive Name

No data available in table

One can see details regarding the upcoming tasks based on their criticality level

0

Upcomming Task

Task Priority  
Critical

Task In Next 7 Days

Task Name

Contact Name

Schedule Date

Executive Name

No data available in table

## Executives

### Add Executive

One can add a sales representation / executive from this screen. One will be billed for Cerrebro based on the total number of executives defined under here.

Add Executive

☐ Top Management

First Name

Last Name

Designation

User Type  
Select

Reporting To  
Select

Email ID

Contact Number

Executive Category  
Select

CUSTOM FIELDS

AREA

Executive Area

Area Name  
Select

ADD AREA

Enter all details as requested on the screen.

- **First Name, Last Name:** Name of the Executive
- **Designation:** Designation in the organization
- **User Type (Executive / Manager):** If a user will have sales executives reporting to him then select manager, if the user will not have anyone report him then select executive
- **Email Id:** Actual email id of the user. On this email id the executive login credentials will be send
- **Contact Number:** Mobile number of the user
- **Executive Category:** Control field for leave and expense allocation. If you have different type of leave categories which decide the number of leaves per month or the expense budget for the user, then the leave type can be defined under the setting link in the menu. The executive category for the executive then can be selected here
- **Area:** The sales defined are which the executive has access to. These sales area can be defined in the setting page. One can select multiple area names

CUSTOM FIELDS

AREA

Executive Area

Area Name  
Rajasthan

Executive Area

Area Name  
West Bengal

Executive Area

Area Name  
Chattisgarh

ADD AREA

## View Executives

All executive details are shown here.

View Executives

Copy

Column visibility

Search:

Executive Name	Designation	Contact Number	Email ID	Area	Executive Category	Reporting To	App Version
Abha Sharma	Sales Executive	7836981539	sharmaabha39@gmail.com	Vasant Kunj,Saket,Chanakyapuri	-	SachinKumar	Not Login
Dinesh Maurya	Sales Executive	8010019879	dineshmaurya2jan@gmail.com	Moolchand	-	SachinKumar	Not Login
Nishant Srivastava	Sales Executive	8081306020	nishant.mgrm@gmail.com	Lucknow	-	SachinKumar	Not Login
Rohini Ahluwalia	Manager	9988776655	rohini.ahluwalia@mgrm.com	Okhla,Malviya Nagar,Sangam Vihar,General,Lucknow,Tugalkabad Extn,Hamdard Nagar,Vasant Kunj,Saket,Chanakyapuri,Nehru Nagar,Sarita Vihar,Moolchand	-	RohiniAhluwalia	Not Login
Sachin Kumar	Manager	7838829554	sachin.kumar@mgrm.com	Okhla,Malviya Nagar,Sangam Vihar,General,Lucknow,Tugalkabad Extn,Hamdard Nagar,Vasant Kunj,Saket,Chanakyapuri,Nehru Nagar,Sarita Vihar,Moolchand	-	RohiniAhluwalia	Not Login

Showing 1 to 5 of 5 entries

Previous

1

Next

## Contacts

### Add Customer

Add Customer

Customer Name

Type

General

Category

Doctor

Area Name

Sangam Vihar

Customer Status

active

CUSTOM FIELDS

POINTS OF CONTACTS

LOCATION

ATTACHED FILES

GENERAL

Speciality

Ortho

CANCEL

ADD THIS CUSTOMER

One can add a new customer via the add customer option. Customer are contacts who the company is already dealing with. The details that are required are:

- **Customer Name:** Name of the customer
- **Type:** Select customer type. Different customer type can be defined under setting. As of now one option general is defined

- **Category:** Select customer category. As of now we have defined the following customer category:
  - **Hospital**
  - **Doctor**
  - **Chemist**
- **Customer Status:** Select customer status. Multiple customer can be defined under the setting flag. Current we have set only one value i.e. Active
- **Area Name:** The sales area to which the customer belongs to
- **Specialty:** Can define a doctor specialty. Option field based on MGRM requirement

CUSTOM FIELDS
POINTS OF CONTACTS
LOCATION
ATTACHED FILES
GENERAL

Points Of Contact

Name

Designation

Birth Date

Contact Number

Email Id

Anniversary Date

ADD POINTS OF CONTACTS

CANCEL ADD THIS CUSTOMER

- **Point of Contacts:** Can define multiple point of contacts as required. For Every POC the following information is required:
  - **Name**
  - **Designation**
  - **Contact Number**
  - **Email Id**
  - **Birth Date**
  - **Anniversary Date**
- **Location:** Add a single or multiple address details

CUSTOM FIELDS
POINTS OF CONTACTS
LOCATION
ATTACHED FILES
GENERAL

Location

Location Name

Contact Number

Fax Number

Country Select

State

City

Postal Code

Locality

Street Name

ADD LOCATIONS

CANCEL ADD THIS CUSTOMER



- **Attached Filed:** Attach multiple files for the customer. The files can be in .pdf, .doc, .xls or any other common file types
- **General:** Can any kind of general information.

[illegible]

Add Lead

Leads are contacts, who we are trying to convert into a customer. For leads we require 3 addition fields:

- **Source:** The marketing channel from where the lead was generated
- **Potential Value:** The potential business value of the lead
- **Currency:** The currency if the business value
- **Interested products and services:** The products and services the lead is interested in

CUSTOM FIELDS

INTERESTED PRODUCTS/SERVICES

POINT OF CONTACTS

LOCATION

ATTACHED FILES

GENERAL

Interested Product And Services

Product Main Group

Select

Product Sub Group

Select

Product Stock

Select

PRODUCTS AND SERVICES

CANCEL

ADD THIS LEAD

Entire product and service master can be defined under the setting menu

## View Contacts

One can view all the active contacts from here. Searching options are available here. As this page is available to everyone, customers master extraction in excel is disabled here and provided in a separate report

View Contacts									
Column visibility		Search: <input type="text"/>							
ContactType	ContactsName	Category	Type	CreatedOn	CreatedBy	SourceName	CurrencyName	PotentialValue	AreaName
CUSTOMER	SHRI RAM MEDICOS	Chemist	General	21 Mar 2017	Rohini Ahluwalia	NA	NA	NA	Okhla
CUSTOMER	AYUSH PHARMACY	Chemist	General	21 Mar 2017	Rohini Ahluwalia	NA	NA	NA	Okhla
CUSTOMER	DR DEEPAK CHAUDHARY	Doctor	General	21 Mar 2017	Rohini Ahluwalia	NA	NA	NA	General
CUSTOMER	BATRA	Hospital	General	21 Mar 2017	Rohini Ahluwalia	NA	NA	NA	Sangam Vihar
CUSTOMER	SURYA HOSPITAL	Hospital	General	21 Mar 2017	Rohini Ahluwalia	NA	NA	NA	Lucknow
CUSTOMER	DR DEEPAK JOSHI	Doctor	General	21 Mar 2017	Rohini Ahluwalia	NA	NA	NA	General
CUSTOMER	RAI HOSPITAL	Hospital	General	21 Mar 2017	Rohini Ahluwalia	NA	NA	NA	Lucknow
CUSTOMER	AMAR MEDICOS	Chemist	General	21 Mar 2017	Rohini	NA	NA	NA	Okhla

One can select a specific customer to view their details

## Job Scheduling

### Task Master Creation

One can define a task master under the settings option. This tasks are the different types of task a sales executive can perform. Every task is to be linked with a task priority

## Task Master

Search:

Sr.No.	Task Name	Task Priority	Edit	Delete
1	Visting Hospitals	Medium		
2	Complaint Resolution	Medium		
3	Meeting Doctors	Medium		
4	Payment Collection	High		
5	Sales Generation	Medium		

Showing 1 to 5 of 5 entries

Previous 1 Next

ADD NEW

## Create Job

Once can create a new job for a sales executive under the option, executive job scheduling. An executive can create his own jobs from his mobile or his manager can create a job for him.

When the manager created a job for a sales executive, the sales executive is send a mobile notification which appear on the Cerrebro app of the sales executive

Scheduling Activity

Executive Name  
Abha Sharma

Customer Name  
AJANTA HOSPITAL

Schedule Date  
01/04/2017  
dd/mm/yyyy

Meeting Time  
11:00 AM

Location  
-Other-

Location Remark  
test

Attendees

☒ DR ANIL KHANNA

Task

Task	Creation Remarks
<input checked="" type="checkbox"/> Visting Hospitals	Test 123
<input type="checkbox"/> Complaint Resolution	
<input checked="" type="checkbox"/> Meeting Doctors	Test 123

One will enter all the details:

- **Executive Name:** Executive for whom the job is being created
- **Customer Name:** Customer for whom the job is being crated
- **Schedule Date:** Job date

- **Meeting Time:** Time of the meeting
- **Location:** Where the meeting is supposed to happen, can select from the pre-defined addresses in the customer master or enter a new one under others
- **Attendees:** Who is expected to attend the meeting from the customer side
- **Tasks:** The tasks that the sales executive is supposed to do. Can also enter some remarks that will help the executive perform the task more effectively

## Executive Job via Web

As and when required one can also execute jobs via the web. This option can be given to an optional few as decided by the management. Like the back office staff.

Execute Job

Area Name  
Lucknow

Contacts

GANGA HOSPITAL-C

START JOB

One can select the area, and then the customer in that area will be shown. The user can select the required contact and then start the Job

Job Date: 01 April 2017

By: Rohini Ahluwalia

General Hospital

GANGA HOSPITAL

Lucknow Customer

Job Execution

ATTENDEES

TASKS

ATTENDEES

Attendees Name

DR P K SUKLA

Designation

Contact No.

0

Email Id

NA

ADD EXISTING ATTENDEES

ADD NEW ATTENDEES

One can select the Attendee with whom the meeting / discuss has happened.

ATTENDEES
TASKS

Tasks

Task Name

Visting Hospitals

Completed

☒

Followup

☐

Followup Date

Creation Remark

Test Creation Remarks

Execution Remark

Test Execution Remarks

UPLOAD FILE

Tasks

Task Name

Complaint Resolution

Completed

☐

Followup

☐





Followup Date

Creation Remark

Execution Remark

Under the task details, one can select the tasks that are performed. One can enter both creation remarks and execution remarks for these jobs. If the task is completed, one will check completed and if it is under follow up then one will check follow up and provide a follow up date. A job will be created automatically on that day

Multiple tasks can be added here. One can also upload files against specific tasks. All common file formats are supported

Uploaded Files				
Task	File Name	Description	Uploaded Files	Edit
C Form Collection	Book2.xlsx	QWERTY		
Complain Handling	Chart.xlsx	Testing		

## Map Dashboard

