

Deal Management System

Osource India Pvt. Ltd.

Login Screen

Welcome to Deal Management System (DMS). DMS is an online tool which allows RMs to log deal information real time. RMs can create new deals and change the status of current deals.

Log In

User Name :

Password :

Landing Page

Thursday, October 28, 2010

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My Deals Overview		
This Month October	No. of Won Deals (Validated)	1
	Estimated Revenues (TEUR)	195
Year to Date 2010	No. of Won Deals (Validated)	1
	Estimated Revenues (TEUR)	195
	No. of Deals Pending Confirmation	0
	Amount of Deals Pending Confirmation (TEUR)	0
	No. of Deals Rejected	1
	Amount of Deals Rejected (TEUR)	195
FY2009 Budget	Revenues (TEUR)	7200

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Country Master	
Product Partner Master	
Relationship Manager Master	
Designation Master	
Budget Setup	
Upload	

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Create New Deal

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Deal Creation Page

Deal Creation Date*	: <input type="text" value="October-2010"/>	Product Colleague*	: <input type="text" value="sonia"/>
Country*	: <input type="text" value="INDIA"/>	Deal Size(EUR Mio)	: <input type="text" value="300"/>
Customer Type*	: <input type="radio"/> Existing <input checked="" type="radio"/> New	Estimated Revenue(TEUR)*	: <input type="text" value="195"/>
Customer Name*	: <input type="text" value="ABC Enterprises"/>	Revenue Time Line*	: <input type="text" value="Annual"/>
Relationship Manager*	: <input type="text" value="chetna"/>	Confidentiality*	: <input type="radio"/> Yes <input checked="" type="radio"/> No
Additional RM	: <input type="text" value="rupali"/>	Target Date*	: <input type="text" value="February"/> <input type="text" value="2011"/>
Regional / Global RM	: <input type="text" value="suraj"/>	Deal Status*	: <input type="text" value="Pitching"/>
Regional MNC Client	: <input type="radio"/> Yes <input checked="" type="radio"/> No	Probability(%)*	: <input type="text" value="25"/>
Deal Description*	: <input type="text" value="test description"/>	Remarks	: <input type="text" value="test"/>
Product Partner*	: <input type="text" value="GTB-OTHERS"/>	Product Partner Email Address*	: <input type="text" value="rupali@osourceindia.com"/>

Existing Pipeline Deal

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Deal Existing Pipeline

Deal Code : Customer Name: Search | Reset Search

Deal Code	Customer Name	Relationship Manager	Deal Size (EUR Mio)	Est. Rev (TEUR)	Deal Status	Deal Description	Confirmation Status	Delete
IND/10/0001	ABC Enterprises	chetna	300	195	Pitching	test test		Delete

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Update Existing Deal

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Update Existing Deal

Deal Code *	: <input type="text" value="IND/10/0001"/>	Probability(%)	: <input type="text" value="50"/>
Deal Creation Date*	: <input type="text" value="October-2010"/>	Product Colleague*	: <input type="text" value="sonia"/>
Country*	: <input type="text" value="INDIA"/>	Deal Size(EUR Mio)	: <input type="text" value="300"/>
Customer Type*	: <input type="radio"/> Existing <input checked="" type="radio"/> New	Estimated Revenue(TEUR)*	: <input type="text" value="195"/>
Customer Name*	: <input type="text" value="ABC Enterprises"/>	Revenue Time Line*	: <input type="text" value="Annual"/>
Relationship Manager*	: <input type="text" value="chetna"/>	Confidentiality*	: <input type="radio"/> Yes <input checked="" type="radio"/> No
Additional RM	: <input type="text" value="rupali"/>	Target Date*	: <input type="text" value="February"/> 2011
Regional / Global RM	: <input type="text" value="suraj"/>	Deal Status*	: <input type="text" value="Pitching"/>
Deal Description*	: <input type="text" value="test test"/>	Remarks	: <input type="text" value="test"/>
Product Partner*	: <input type="text" value="GTB-OTHERS"/>	Product Partner Email Address*	: <input type="text" value="sonia.salvi@osourceindia.com"/>
Regional MNC Client	: <input type="radio"/> Yes <input checked="" type="radio"/> No		

Deal History

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Deal History:												Back	
Deal Tracking Date	Rel. Manager 1	Regional RM/Global RM	Deal Description	Deal Size (EUR Mio)	Est. Rev (TEUR)	Deal Status	Rev. Time Line	Probability	Target Month Year	REMARKS	Email	Confirmation Status	Rejection Remarks
Oct 18, 2010	rupali	suraj	test test	300	195	Discussion with client	Annual	50	February-	test	sonia.salvi@osourceindia.com		
Oct 18, 2010	rupali	suraj	test test	300	195	Pitching	Annual	50	February-	test	sonia.salvi@osourceindia.com		
Oct 18, 2010	rupali	suraj	test test	300	195	Pitching	Annual	50	February-	test	sonia.salvi@osourceindia.com		

Deal Won / Lost

Monday, October 18, 2010

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Deal Amendment

Deal Code *	: <input type="text" value="IND/10/0001"/>	Probability(%)	: <input type="text" value="100"/>
Deal Creation Date*	: <input type="text" value="October-2010"/>	Product Colleague*	: <input type="text" value="sonia"/>
Country*	: <input type="text" value="INDIA"/>	Deal Size(EUR Mio)	: <input type="text" value="300"/>
Customer Type*	: <input type="radio"/> Existing <input checked="" type="radio"/> New	Estimated Revenue(TEUR)*	: <input type="text" value="195"/>
Customer Name*	: <input type="text" value="ABC Enterprises"/>	Revenue Time Line*	: <input type="text" value="Annual"/>
Relationship Manager*	: <input type="text" value="chetna"/>	Confidentiality*	: <input type="radio"/> Yes <input checked="" type="radio"/> No
Additional RM	: <input type="text" value="rupali"/>	Target Date*	: <input type="text" value="February"/> <input type="text" value="2011"/>
Regional / Global RM	: <input type="text" value="suraj"/>	Deal Status*	: <input type="text" value="Won"/>
Deal Description*	: <input type="text" value="test test"/>	Remarks	: <input type="text" value="test"/>
Product Partner*	: <input type="text" value="GTB-OTHERS"/>	Product Partner Email Address*	: <input type="text" value="rupali@osourceindia.com"/>
Regional MNC Client	: <input type="radio"/> Yes <input checked="" type="radio"/> No	Trade Date*	: <input type="text" value="01 Nov 2010"/>
Product deal Id*	: <input type="text" value="abc001"/>	Additional RM RC %	: <input type="text" value="50"/>
Relationship Manager RC %	: <input type="text" value="50"/>		
Revenue Credit	: <input type="text" value="195"/>		

Deal Update

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Deal Update Page (Pending - Confirmation)

Deal Code : Customer Name: Search | Reset Search

Deal Code	Customer Name	Relationship Manager	Deal Size (EUR Mio)	Est. Rev (TEUR)	Deal Description	Confirmation Status	Delete
IND/10/0001	ABC Enterprises	chetna	300	195	test test	Pending	Delete
EUR/09/0001	Shalimar Construction Company	rupali	300	50	Deal for shalimar group of companies	Pending	Delete

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Deal Update Page (Rejected - Confirmation)

Deal Code : Customer Name: Search | Reset Search

Deal Code	Customer Name	Relationship Manager	Deal Size (EUR Mio)	Est. Rev (TEUR)	Deal Description	Confirmation Status	Delete
IND/10/0002	XYZ Group	chetna	300	195	test test	Rejected	Delete

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Email to Product Partner

From: chetana@osourceindia.com [mailto:chetana@osourceindia.com]

Sent: Monday, October 18, 2010 11:39 AM

To: rupali@osourceindia.com

Subject: Action Required: CBC Deal Confirmation

You have been identified as the CBC Product Partner regarding the following deal.

Please confirm that the below deal information is correct and click the submission button for us to properly record the transaction details.

CBC Deal Information :

CBC Relationship Manager Name : chetna

Deal Description :

Client Name :	ABC Enterprises	Deal Size (EUR Mio) :	300
Estimated Revenue (TEUR) :	195	Deal Description :	test test
Revenue Timeline :	Annual	Deal Completion Date :	October-2010
Product Unit :	GTB-OTHERS	Product Colleague :	sonia
Originating RM :	chetna	Country :	INDIA
Additional RM :	rupali	Regional/Global RM :	suraj
Deal Code :	DE000004	Product Deal Code :	abc001
Trade Date :	01 Nov 2010		

[Click here to Confirm and submit](#)

Rejection Remarks :

Should you disagree with the above information please provide details and click the rejection button below)

Deal Amendment

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Deal Amendment

Deal Code : Customer Name: Search | Reset Search

Deal Code	Customer Name	Relationship Manager	Deal Size (EUR Mio)	Est. Rev (TEUR)	Deal Status	Deal Description	Confirmation Status	Delete
IND/10/0001	ABC Enterprises	chetna	300	195	Won	test test	Confirmed	Delete
EUR/09/0001	Shalimar Construction Company	rupali	300	50	Won	Deal for shalimar group of companies	Pending	Delete
IND/09/0002	ADITYA BIRLA	suraj	100	16	Won	test this deal		Delete
IND/09/0001	ADITYA BIRLA	chetna	120	32	Won	DEAL FOR ADITYA BIRLA GROUP FOR THERE NEW STEEL PLANT IN TERANGUL	Confirmed	Delete

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Query Builder

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Query Builder :

Select Table:

Select All Fields:	Sort Order	Fields	Group By	Group Order
<input checked="" type="checkbox"/>	<input type="text"/>	Deal MID	<input type="checkbox"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	Date Created	<input type="checkbox"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	Country	<input type="checkbox"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	Client Name	<input type="checkbox"/>	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="text"/>	Customer Type	<input type="checkbox"/>	<input type="text"/>

Specify Query Criteria :

Fields	Condition	Value
<input type="text" value="--Select--"/>	<input type="text" value="--Select--"/>	<input type="text"/>
<input type="text" value="--Select--"/>	<input type="text" value="--Select--"/>	<input type="text"/>
<input type="text" value="--Select--"/>	<input type="text" value="--Select--"/>	<input type="text"/>
<input type="text" value="--Select--"/>	<input type="text" value="--Select--"/>	<input type="text"/>
<input type="text" value="--Select--"/>	<input type="text" value="--Select--"/>	<input type="text"/>

Query Builder Result

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Query Builder Result : Back

Deal MID	Date Created	Country	Client Name	Customer Type	Relationship Manager	Additional RM	Regional/Global RM	Deal Description	Product Partner	Product Colleague	Deal Size	Estimated Revenue	Revenue Timeline
IND/09/0001	1-Oct-09	INDIA	ADITYA BIRLA	EXISTING	chetna			DEAL FOR ADITYA BIRLA GROUP FOR THERE NEW STEEL PLANT IN TERANGUL	GTB-TRS	Suraj Dubey	120	32	Upfront
EUR/09/0001	1-Oct-09	EUROPE	Shalimar Construction Company	NEW	rupali			Deal for shalimar group of companies	CF/ECM	Rupali	300	50	Upfront
IND/09/0002	1-Oct-09	INDIA	ADITYA BIRLA	EXISTING	suraj	chetna		test this deal	GM-Emerging Market.	chetan sharma	100	16	Annual
IND/10/0001	1-Oct-10	INDIA	ABC Enterprises	NEW	chetna	rupali	suraj	test test	GTB-OTHERS	sonia	300	195	Annual
IND/10/0002	1-Oct-10	INDIA	XYZ Group	NEW	chetna	rupali	suraj	test test	GTB-	sonia	300	195	Upfront

◀ [Progress Bar]

Export To Excel

Deal MID	Date Created	Country	Client Name	Customer Type	Relationship Manager	Additional RM	Regional/Global RM	Deal Description
IND/09/0001	1-Oct-09	INDIA	ADITYA BIRLA	EXISTING	chetna			DEAL FOR ADITYA BIRLA GRO STEEL PLANT IN TERANGUL
EUR/09/0001	1-Oct-09	EUROPE	Shalimar Construction Company	NEW	rupali			Deal for shalimar group of comp
IND/09/0002	1-Oct-09	INDIA	ADITYA BIRLA	EXISTING	suraj	chetna		test this deal
IND/10/0001	1-Oct-10	INDIA	ABC Enterprises	NEW	chetna	rupali	suraj	test test
IND/10/0002	1-Oct-10	INDIA	XYZ Group	NEW	chetna	rupali	suraj	test test

View – Pipeline Deals

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View my Pipeline Deals

Search Criteria : Deal Code Customer Name

Deal Code	Customer Name	Relationship Manager	Deal Size (EUR Mio)	Est. Rev. (TEUR)	Deal Status	Deal Description
IND/10/0002	XYZ Group	chetna	300	195	Discussion with client	test test

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Date Created	Country	Client Name	Customer Type	Relationship Manager	Additional RM	Regional/Global RM	Deal Description	Product Partner Name	Product Coll
1-Oct-10	INDIA	XYZ Group	NEW	chetna	rupali	suraj	test test	GTB-OTHERS	sonia

View – Won Deals

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View my Won and Confirmed Deals

Search Criteria : Deal Code Customer Name

Deal Code	Customer Name	Relationship Manager	Deal Size (EUR Mio)	Est. Rev. (TEUR)	Deal Status	Deal Description	Confirmation Status
IND/10/0001	ABC Enterprises	chetna	300	195	Won	test test	Confirmed

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Date Created	Country	Client Name	Customer Type	Relationship Manager	Additional RM	Regional/Global RM	Deal Description	Product Partner Name
1-Oct-10	INDIA	ABC Enterprises	NEW	chetna	rupali	suraj	test test	GTB-OTHERS

View – Lost Deals

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View my Lost Deals

Search Criteria : Deal Code Customer Name

Deal Code	Customer Name	Relationship Manager	Deal Size (EUR Mio)	Est. Rev. (TEUR)	Deal Status	Deal Description
IND/10/0002	XYZ Group	chetna	300	195	Lost	test test

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deal_mid	Date Created	Country	Client Name	Customer Type	Relationship Manager	Additional RM	Regional/Global RM	Deal Description	Product Partner Name
IND/10/0002	1-Oct-10	INDIA	XYZ Group	NEW	chetna	rupali	suraj	test test	GTB-OTHERS

View – All Deals

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View all my Deals

Search Criteria : Deal Code Customer Name

Deal Code	Customer Name	Relationship Manager	Deal Size (EUR Mio)	Est. Rev. (TEUR)	Deal Status	Deal Description	Confirmation Status
IND/10/0002	XYZ Group	chetna	300	195	Lost	test test	
IND/10/0001	ABC Enterprises	chetna	300	195	Won	test test	Pending
EUR/09/0001	Shalimar Construction Company	rupali	300	50	Won	Deal for shalimar group of companies	Pending
IND/09/0002	ADITYA BIRLA	suraj	100	16	Won	test this deal	
IND/09/0001	ADITYA BIRLA	chetna	120	32	Won	DEAL FOR ADITYA BIRLA GROUP FOR THERE NEW STEEL PLANT IN TERANGUL	Confirmed

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Date Created	Country	Client Name	Customer Type	Relationship Manager	Additional RM	Regional/Global RM	Deal Description
1-Oct-10	INDIA	XYZ Group	NEW	chetna	rupali	suraj	test test
1-Oct-10	INDIA	ABC Enterprises	NEW	chetna	rupali	suraj	test test
1-Oct-09	EUROPE	Shalimar Construction Company	NEW	rupali			Deal for shalimar group of compa
1-Oct-09	INDIA	ADITYA BIRLA	EXISTING	suraj	chetna		test this deal
1-Oct-09	INDIA	ADITYA BIRLA	EXISTING	chetna			DEAL FOR ADITYA BIRLA GROUP THERE NEW STEEL PLANT IN TE

View – Pending / Rejected Deals

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View my Pending-Confirmation Deals

Search Criteria : Deal Code Customer Name

Deal Code	Customer Name	Relationship Manager	Deal Size (EUR Mio)	Est. Rev. (TEUR)	Deal Description	Confirmation Status	Product Colleague
IND/10/0002	XYZ Group	chetna	300	195	test test	Rejected	sonia
EUR/09/0001	Shalimar Construction Company	rupali	300	50	Deal for shalimar group of companies	Pending	Rupali

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Date Created	Country	Client Name	Customer Type	Relationship Manager	Additional RM	Regional/Global RM	Deal Description
1-Oct-10	INDIA	XYZ Group	NEW	chetna	rupali	suraj	test test
1-Oct-09	EUROPE	Shalimar Construction Company	NEW	rupali			Deal for shalimar group of companies

Thank You