



Sales & Service Management

For Manufacturing Industry

Challenges in Manufacturing

“Manufacturing industries are moving towards more complexities due to expansion which has resulted in complication in the value chain, redundancy in systems and processes, and a lack of transparency and flexibility in processes. Improving performance can be a challenge in this environment. “

Sales Management for Manufacturing is aimed at improving sales pipeline, measuring sales performance metrics efficiently, streamlining manufacturing process, and managing customer data such as activities, item details, proposed quotes, etc. easily.

Service Management for Manufacturing is aimed to maintain a great supply chain management and provide an extensive support to the customer as after sales service. As most manufacturing industries are 'customer-centric' it is important for them to maintain good relation with them through entire sales process.

Manufacturers' complaints in Sales Management

I don't have a 360-degree view of my customers

My representatives hate using our current CRM

I can't plan or forecast accurately

Our quoting process is slow

I have limited visibility into my sales pipeline

Our customers complain about our services

Our sales processes are inefficient

Don't have the details regarding issues in equipment's

Our win-rates are dwindling

I cannot track the tools used by the engineer at vendor's location

Maintaining the list of equipment's under service agreement

Tracking issues related to payment dates

I have limited visibility to my engineer's work hours

Our service agreements expires without our knowledge

Here's why Manufacturers need a CRM

- To give their customers the confidence that you are organized
- To give answers to their customers quickly and reliably
- To engage a customer or prospect on a new opportunity
- To gather the customer requirements all in one place
- To target prospects and manage those communications
- To measure the team against the goals set for them
- To track the selling process and enhance sales
- To provide a healthy after sales service to our vendors.
- To measure actual amount spent by an engineer for solving issue.
- To get notified about the payment dates.
- To maintain the details about the AMC between you and your vendor.
- To track the condition of the equipment.

Sales Management for Manufacturing: Key focus areas

- Enquiry Management
- Proposal Management
- GST calculation
- Visibility on Inventory
- Sample Management with Courier Tracking
- Design Management
- Pricelist management
- Dashboard
- Sales Performance metrics

Service Management for Manufacturing: Key focus areas

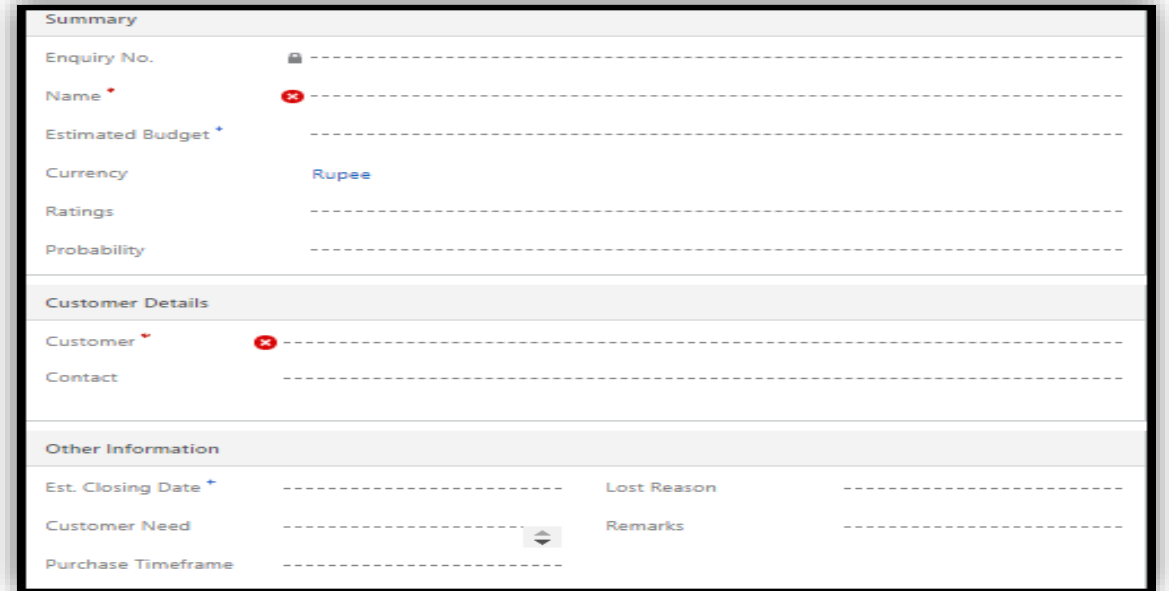
- Equipment Management
- Service Agreements or AMC
- Service Calls
- Tools

Key Features – Sales Management

Key Features

Enquiry Management

- Manage incoming enquiries from various sources
- Capture leads and manage them accordingly
- Flexible enquiry Distribution
- Continuous Activity Prioritization
- Real-Time Dashboard and Reporting
- Sales Pipeline
- Flexible sales process



The screenshot displays a web-based enquiry management form. It is organized into three main sections: Summary, Customer Details, and Other Information. The Summary section includes fields for Enquiry No., Name, Estimated Budget, Currency (set to Rupee), Ratings, and Probability. The Customer Details section includes fields for Customer and Contact. The Other Information section includes fields for Est. Closing Date, Customer Need, Purchase Timeframe, Lost Reason, and Remarks. The form uses a clean, modern design with dashed lines for input fields and icons for validation (lock, error, and dropdown).

Summary	
Enquiry No.	-----
Name *	-----
Estimated Budget *	-----
Currency	Rupee
Ratings	-----
Probability	-----
Customer Details	
Customer *	-----
Contact	-----
Other Information	
Est. Closing Date *	-----
Customer Need	-----
Purchase Timeframe	-----
Lost Reason	-----
Remarks	-----

GST calculation

- Calculate GST as per the product for both interstate and intrastate efficiently
- Maintain Warehouses
- HSN/SAC master association with Products
- Auto selection of Intrastate/Interstate based on Source and supply location
- Ready with GST Tax group data
- Reduced Cost of Production
- Distribution model restructuring
- Area based Exemptions

The image shows two overlapping screenshots of the Microsoft Dynamics 365 Settings interface. The top screenshot displays the 'New Tax Group' form, and the bottom screenshot displays the 'CGST' Tax Group Component form.

Top Screenshot: New Tax Group

TAX GROUP : INFORMATION
New Tax Group

General

General	
Group code *	<input type="text"/>
Total Tax(%) *	-----

Group Component

Name ↑	Tax %
To enable this content, create the record.	

Bottom Screenshot: CGST

TAX GROUP COMPONENT : INFORMATION
CGST

General

Tax Group *	G - 5
Name *	CGST
Tax Jurisdiction Type	Intrastate
Tax % *	2.50

Key Features

Proposal Management

- Easily create proposals for prospects and customers in a few steps
- Quickly create proposal from enquiry.
- Item selection on proposal based on customer need with pricing.
- GST calculation for each line items.
- Get the print of proposal and submit to customer
- Maintain history of each revised proposal

Proposal Details

Proposal ID

Proposal Name *

Customer *

Revision ID

Valid Till

PROPOSAL : INFORMATION

Requirement for gear parts

Status: Active | Status Reason: Draft | Owner: Rutul Chauhan

Enquiry > Technical Evaluation > Sample Process > Proposal (Active for 1 day, 4 h...) > Negotiation > Close

General

Proposal Details

Proposal ID: 1000055

Proposal Name: Requirement for gear parts

Customer: AEZ PVT LTD

Revision ID: 8

Valid Till:

Related Enquiry Details

Purchase Timeframe: Next Quarter

Contact: Ankit Patel

Email: Ak@ico.com

Mobile Phone:

Terms and Conditions

Payment Terms:

Shipping Terms:

Freight Terms:

Delivery Details

Warehouse: Gujarat Test Warehouse

Requested Delivery Date: 31-01-2019

Key Features

Visibility on Inventory

- Get visibility into the available products to sell
- Manage production based on the inventory availability
- Forecast demand
- Get Stock Valuation available at warehouse
- Good for business dealing with various stocks.
- Know right amount of stock present at right location

WAREHOUSE : INFORMATION
New Warehouse

General

Warehouse Name *

State *

Inventory

Item ↑ | Available Qua... |

To enable this content, create the record.

WAREHOUSE : INFORMATION
Chennai Test Warehouse

General

Warehouse Name * Chennai Test Warehouse

State * Tamil Nadu

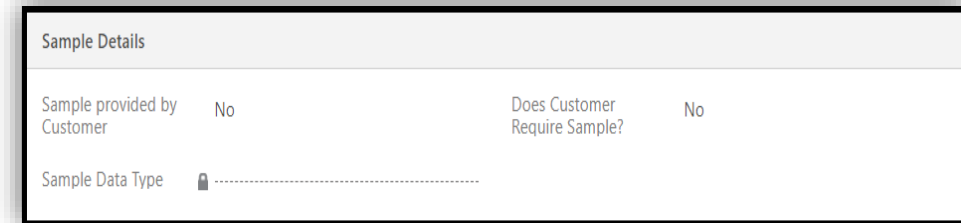
Inventory

Item ↑	Available Qua...
400 SERIES TWO STA...	6,10,000.00
5 LEAD ECG CABLE F...	58,000.00

Key Features

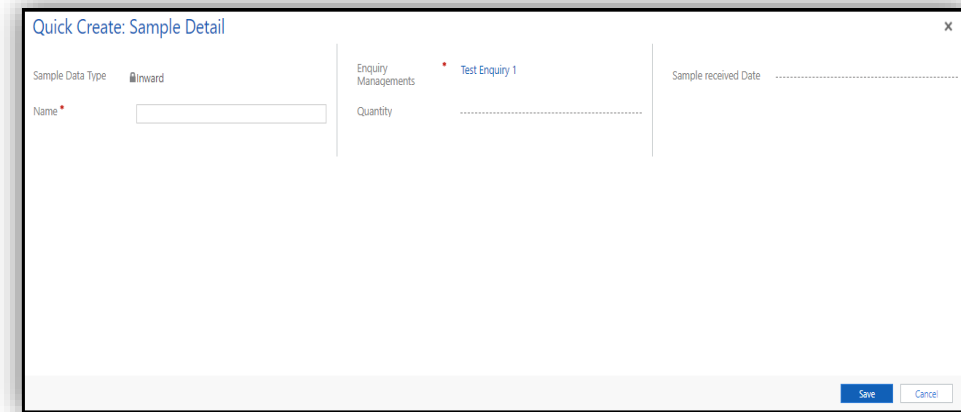
Sample Management

- Easily associate that sample request to a specific customer or prospect
- Track the samples right to the specific opportunity you have in your pipeline that triggered the sample request
- Generate reports and view dashboards matching all sample requests with a potential new sale
- Ensure better internal communication and organization



Sample Details

Sample provided by Customer	No	Does Customer Require Sample?	No
Sample Data Type	[locked icon]		



Quick Create: Sample Detail

Sample Data Type	Inward	Enquiry Managements	Test Enquiry 1	Sample received Date
Name *	[input field]	Quantity		

Save Cancel

Key Features

Sales Performance metrics

- Follow the customer order status in a pipeline view.
- Stay on top of customer Proposal processing – from enquiry through manufacturing solution
- Keep an eye on the enquiry status
- Manage your whole sales team, sales contacts and next contact dates in one place
- Analyze win/Lost ratio of enquiry and proposal
- Check productivity of your sales team

Key Features – Service Management

Key Features

Equipment Management

- Stores details of the customers and the equipment.
- Records warranty details of the equipment (Start and End date).
- Maintains validity of the AMC.
- Keeps number of service calls given on particular equipment.

EQUIPMENT : INFORMATION

New Equipment

Owner*
Biju Balakrishnan

General

Equipment Details	Warranty Details	Service Agreement Details
Equipment ID <input type="text"/>	Warranty Start Date <input type="text"/>	Service Agreement <input type="text"/>
Customer* <input type="text"/>	Warranty End Date <input type="text" value="Select to enter data"/>	Under Service Agreement <input type="checkbox" value="No"/>
Equipment Name* <input type="text"/>	Under Warranty <input type="checkbox" value="No"/>	
Serial Number* <input type="text"/>		
Description <input type="text"/>		
		Service Calls
		No of Service Calls <input type="text" value=".."/>

EQUIPMENT : INFORMATION

Bluetooth Option on CS-20

Owner*
Biju Balakrishnan

General

Equipment Details	Warranty Details	Service Agreement Details
Equipment ID <input type="text" value="C-18A037"/>	Warranty Start Date <input type="text" value="15-01-2019"/>	Service Agreement <input type="text" value="SA-000002"/>
Customer* <input type="text" value="A.K.SALES CORPORATION"/>	Warranty End Date <input type="text" value="14-07-2019"/>	Under Service Agreement <input type="checkbox" value="Yes"/>
Equipment Name* <input type="text" value="Bluetooth Option on CS-20"/>	Under Warranty <input type="checkbox" value="Yes"/>	
Serial Number* <input type="text" value="C-18A037"/>		
Description <input type="text" value="Bluetooth Option on CS-20"/>		
		Service Calls
		No of Service Calls <input type="text" value="0"/>

Key Features

Service Agreements

- Provides details of the AMC.
- Maintains records about the visits done and pending of the engineer.
- Maintains payment cycle of the customer based on monthly, quarterly, yearly, etc.
- Notifies about the AMC expiry.
- Customer can know about the payment due two days prior via email.

SAVE SAVE & CLOSE NEW FLOW FORM EDITOR

SERVICE AGREEMENT : INFORMATION
New Service Agreement

Source No. of Visits Available Status Reason Owner
Draft Biju Balakrishnan

General

Service Agreement Details

Service Agreement ID
Customer
Contact
Equipment
Equipment Serial No
No. of Visits

Start Date
End Date
Under Service Agreement
Total Service Agreement Amount
Payment Cycle

Service Agreement Tenure (in Months)
Service Agreement Tenure (in years)
Amount as per Payment cycle
Next Payment Date

Activities

ACTIVITIES NOTES

There aren't any notes to show. To get started, enter a note.

There aren't any notes to show. To get started, enter a note.

SERVICE AGREEMENT : INFORMATION
SA-000002

Source No. of Visits Available Status Reason Owner
Active 11 Biju Balakrishnan

General

Service Agreement Details

Service Agreement ID SA-000002
Customer A.K.SALES CORPORATION
Contact
Equipment Bluetooth Option on CS-20
Equipment Serial No C-18A037
No. of Visits 11

Start Date 01-02-2019
End Date 31-01-2020
Under Service Agreement Yes
Total Service Agreement Amount ₹3,000.00
Payment Cycle Quarterly

Service Agreement Tenure (in Months) 12
Service Agreement Tenure (in years) 1.00
Amount as per Payment cycle ₹750.00
Next Payment Date 01-05-2019

Activities

ACTIVITIES NOTES

Enter a note

Key Features

Service Calls

- Calculates total number of chargeable hours utilized.
- Knowledge based articles for engineers for quick resolution of the issue.
- Tracks usage of the tools by the engineers.
- Shares details about the last service call for a particular equipment.

The screenshot displays a service call management interface for a specific call (SC-000002). The interface is divided into several sections:

- Service Call Information:** Shows the call ID (SC-000002), status (In Progress), days open (5), and owner (Deviprasad Sahoo).
- General:**
 - Service Call Details:** Includes fields for Service Call ID (SC-000002), Title (Need Servicing of Parts), Type (PM), Customer (Americares India Foundation), Equipment (CARDIOPRUS - E), Contact, Created On (06-03-2019 15:38), and Reopen Date (13-03-2019 17:19).
 - Issue details:** Fields for Issue Reported, Problem Found, and Resolution.
 - Knowledge Base:** A search bar with the query "Need Servicing of Parts" and a dropdown for "All approved articles". It shows "No results found" with a relevance filter.
 - Service Agreement Details:** Fields for Service Agreement, Under Service Agreement (No), and Under Warranty (No).
- Work hour Details:** A table with columns for Service ID, Working Date, Working Hours, Actions Taken, and Chargeable. It shows "No Service Call Work hours found for this Service Call. Select Add (+)".
- Hours Chargeable/Non-chargeable:** Summary statistics: Total hours Worked (0.00), Total Chargeable Hours (0.00), and Chargeable Hours (0).
- Tools & Service Call History:**
 - Tools History:** A table with columns for Service Call, Asset Name, Engineer Name, Asset Provided Da..., Asset Returned Da..., Asset tracking, and Created On. It shows "No Tools History found for this Service Call. Select Add (+)".
 - Recent Calls:** A table with columns for Service Call No., Customer, Equipment, Topic, Problem Found, and Resolution. It shows a recent call for SC-000002, Americares India, CARDIOPRUS, Need Servicing...
- Activities:** A section for tracking activities, currently showing "There aren't any activity records to show. To get started, create an activity like a phone call, task, email, or appointment."


Tools

Tools

- Inventory management of tools.
- Notifies how many tools are:
 - In use
 - Available for use.
- Shares the detail of the engineer using the tool.


TOOLS : INFORMATION
New Tools ☰

General

Name *	<input type="text"/>
Quantity	-----
Available Quantity	-----
Owner *	 Biju Balakrishnan

TOOLS : INFORMATION
Screwdriver Set (11 Pcs) ☰

General

Name *	Screwdriver Set (11 Pcs)
Quantity	30
Available Quantity	30
Owner *	 Biju Balakrishnan



Thank You



sales@intech-systems.com



079 66118960



www.intech-systems.com

