

Case Study - Vinayak Tubes Sales

Another customer of ours had some unique requirements. It's a fairly large stockiest and trader of steel pipes and tubes. Turnover of close to 100 cr.

They have a very small team and wanted a CRM solution for their quotation department where they do not need to fill forms but reply directly by email. They also had companies like Thermax, Alfa Laval etc that would send them enquiries in excel format and demanded quotations back in the same excel sheet.

So, we created a solution for them where directly Enquiry records could be created simply by forwarding enquiry emails to a specified email address created for this purpose. The record would have the text of the email in one of the fields and any attachments would be attached to the email itself.

While forwarding, the forwarder could write at the top of the email the name of the sales person to whom this enquiry ought to become available, along with any price or instructions as needed. This sales person will get a notification/task and the enquiry will be accessible only to her for quoting purposes.

This sales person could then do one of the following as needed –

1. create a reply email directly in the system and send the quote to the party
2. could download the spreadsheet attachment, fill up the prices as per customer instructions and reattach the spreadsheet to the quotation record and forward as email to the party
3. fill up details from the email in the quotation form and create a full pdf form

This was all part of the CRM where they could end with booking an order. Now we are building them an inventory management software to help with servicing these orders and manage the inventory.

Took one non-technical person 2 weeks to complete.