EDITION

November 2026

iTechnoSol Inc.

PROJECT OVERVIEW

Sales CRM for a scientific instrument distributor

Every inquiry taken through quotation, order and service contract on the web, with rupee prices tied to exchange rates.



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CLIENT

An Indian group of companies distributing scientific and analytical instruments for overseas manufacturers

INDUSTRY

Operations and logistics

PLATFORMS

Web

THE REQUIREMENT

One sales team quoted for several group companies and many overseas principals. Customers ranged from university departments to research institutes and multinational plants, each with several contacts. Prices came in foreign currency, and inquiries, quotations, follow-ups, service contracts and targets needed one home.

WHAT WE BUILT

We built a web CRM from the group's own requirement sheet, module by module. Inquiries convert to quotations and sales orders, issued under the chosen group company. Item masters hold duty, freight and tax details, and a currency master updates rupee prices. Follow-ups, maintenance contracts, tours, tasks and targets each have a module and report.

THE OUTCOME

The sales team takes an inquiry through quotation, order and service contract in one system, with follow-ups assigned and tracked. Managers forecast sales from quotation probability and compare targets with achieved sales.

CLIENT PROJECT

What it does

In short: inquiry to service contract in one CRM.

- **Inquiry to quotation to order**
  An inquiry converts to a quotation and then a sales order, issued under the chosen group company.
- **Detailed item and principal masters**
  Items carry model and catalog numbers, HSN code, GST, import duty, freight and insurance. Principals hold catalogs, price lists and certificates.
- **Assigned follow-ups**
  Every inquiry and quotation carries follow-ups with a next date, type, owner and status.
- **Service contracts, tours and tasks**
  Annual maintenance contracts, sales tours with feedback, and tasks with overdue alerts each have a module.
- **Exchange-rate-linked pricing**
  Admins set currency values, and rupee item prices update when the rate changes.
- **Customer groups with many contacts**
  Customers sit under groups, such as departments under a university, each with several contacts.
- **Sales projection**
  Staff record each quote's chance of closing and expected month, giving managers a forecast.
- **Role rights and stamped exports**
  Roles set view, edit and delete rights per module, and exports carry the user, date and time.

BUILT WITH

React · Node.js · Express.js · MongoDB · AWS · GitHub Actions · Git

PLATFORMS

Web

SERVICES

- Custom software development
- Web application development

WORKING WITH US

How a project runs

The same four stages for every project, with working software early and the option to stop after any stage.

STAGE 1

Audit

We map the current process and agree on a first release.

STAGE 2

Trial

A working version on your data before the full build.

STAGE 3

Build

Weekly working demos, integrated with your systems.

STAGE 4

Go live

Rollout to one team, then company-wide.

INCLUDED IN EVERY QUOTATION

- Written scope with dated milestones
- Testing before delivery
- Documentation for your team
- Weekly working demo
- Code in your repository from day one
- Free bug fixes in the warranty period after launch

OUR PROMISES

- **NDA before anything**
- **You own all the code**
- **Your first call is with a founder**

Planning something similar?

Send us a few lines about your project. A founder replies within 4 business hours with an indicative cost and timeline, free and with no obligation.

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