



CLIENT PROJECT

Sales CRM That Takes Instrument Inquiries to Service Contracts

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

IN SHORT

A scientific instrument distributor's sales team now takes every inquiry through quotation, order and service contract in one CRM, with rupee prices tied to exchange rates.

THE CHALLENGE

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.

AT A GLANCE

INDUSTRY

Operations and logistics

SERVICES

Custom software development

Web application development

PLATFORMS

Web

BUILT WITH

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

Read the full project: <https://itechnosol.com/our-work/sales-crm-scientific-instrument-distributor/>

THE RESULT

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.

KEY FEATURES

■ 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.

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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