



Distribution CRM powered by salesforce.com

Distribution CRM is a complete customer relationship management solution for distributors, retailers, and resellers. Automated processes and workflows allow for efficient and accurate processing of various activities such as promotions, sales orders, inventory notifications, etc. The fully-branded portal empowers your customers to engage and receive updates related to their orders and statements.

Distribution CRM is entirely built on the salesforce.com platform, offering real-time analytics, full security, and access on all devices including smartphones and tablets.

Benefits

- 360-degree view of your customers and their orders
- Seamless integration with SAP, Oracle, and MS Dynamics
- No hardware, no software: fully browser based
- In depth analytics to support decision making

Distribution CRM is available as a complete solution or on a pre-module basis:

Modules for Distribution CRM



Account Management

Create rich account profiles including financial status, contact persons, order history, and more. Access alerts, assign tasks, and collaborate with team members in Sales, Operations, and Finance. Nurture deep relationships by staying in touch with proactive tracking and event alerts that remind you to reach out when customers need you most.

- Full customer profile and classification for retailers, dealers, resellers, etc.
- Activity management and email tracking fully synchronized with Outlook
- Rich, real-time reports and dashboards
- Automated notifications for birthdays and key events
- Customer satisfaction surveys
- Account and contact management (Customer Database)



Order Management

Automate your full order management cycle, from lead to opportunity to order. Stay on top of your sales pipeline and get early warnings when a customer fails to order at the same rate or builds up a large inventory of projects.

- SKU pricing by account, territory, and product line
- Proactive sales through Requests for Purchase Orders customized based on each account's order history
- Receive purchase orders online or through email
- Place and manage orders and history
- Check product availability directly from your ERP
- Set targets and track actuals for your team
- Generate documents instantly: Generate Sales Orders, Quotations, and Invoices



Promotion Management

Initiate and control promotions by SKU, product line, and by account. Run real-time ROI analysis on promotions.

- Track and manage all types of promotions: price drop, marketing support, sell out, discounts, bundles, etc.
- Offer promotions on account or store level
- Run ROI analysis of promotions and full reporting
- Approve planned promotions before running them.
- Automatically inform your sales teams when promotions start
- Issue Credit Notes automatically



Field Sales App

Empower your field sales team on the go with a mobile/tablet app that gives them access to their daily itinerary and all the information they need to collect from retailers, including stock levels and voice of customer (VOC)

- Daily visit schedules
- Google Maps mobile direction to client destination
- Check-in/check-out with GPS coordinates log and timestamp for verification
- Fill field marketing surveys: own and competitor products
- Real-time reporting to management
- Attach store pictures



Customer Portal

Turn your website into a fully functional extension of your office with your own customer portal, complete with order management, customer profile, announcements, inventory availability, etc.

- Secure customer access
- Accessible from anywhere at any time
- Fully branded and customized
- Confirm and track purchase orders
- Open and track cases, including defective item replacement, etc.



Analytics Module

Run reports and dashboards on your data, including daily, weekly, or monthly automated reports straight to your inbox. The Analytics Module is easy to use by non-technical people using drag-and-drop interface.

- Automated reports, dashboards, and email alerts
- Full audit trail on all users
- Integration with SAP, Oracle, MS Dynamics
- Data import wizard
- Automatic data backups
- Export to Excel and CSV