

INDUSTRY

Manufacturing

India's one of the largest steel manufacturing enterprises, with specialization in manufacturing top quality TMT bars and steel pipes and tubes.

Value Creation Modules

Enquiry Management

Enquiries are generated via. WhatsApp and can also be created manually by the users of Salesforce.

Account Management

All new and existing Customer details of TMT and Pipes are managed under Account Section.

Quote Management

Products are distinctly added for separate Opportunities and Quotes for them are generated and managed.

Product and Price book

Products and their pricings are categorically maintained, separately for both TMT and Pipes

Invoice Management

For every order, a detailed Invoice can be generated, which fetches accurate values using integration with Tally

Integrations

Integration with WhatsApp For Enquiry capturing and for sharing the Quote and Integration with Tally system

Personas



- Roles were setup for TMT and Pipes. The roles were: Chairman, Sales Manager, MD and Manager.

Products & Technologies Used



Digital Engagement

INDUSTRY

Manufacturing



CHALLENGES

- Varied sources of enquiries (WhatsApp and manual creation) leading to potential data discrepancies.
- Difficulty in maintaining updated and accurate customer details as the customer base expands.
- Challenges in categorizing and updating product information for TMT and Pipes.
- Potential inconsistencies in pricing information without a centralized price book.
- Manual conversion process from approved quotes to orders leading to potential errors or oversight
- Challenges in generating detailed and accurate invoices for each order.
- Potential discrepancies in invoice values due to integration issues with Tally.

- Customize Salesforce to automate enquiry capturing and streamline account, opportunity, and product management processes.
- Integrated WhatsApp for enquiry capturing and quote sharing.
- Ensure proper mapping of data fields between WhatsApp and Salesforce for accurate data transfer.
- Configure Tally integration using integration

tools like Talent to synchronize data between Salesforce and Tally.

- Establish data mapping and validation rules to ensure data consistency between the two systems.
- Implement role-based access control within Salesforce to restrict access to sensitive data based on user roles.
- Define custom profiles and permission sets for each user role to control access to relevant functionalities.



SOLUTION



BENEFITS

- Standardized process for enquiry, account, opportunity, and product management improves operational efficiency.
- Reduction in data discrepancies and errors through centralized data management.
- Clear visibility into the sales pipeline enables better tracking and forecasting of sales performance.
- Timely and accurate quote, order, and invoice management processes lead to improved customer satisfaction.
- Centralization of customer and product information ensures data consistency and accuracy.
- Integration with external systems improves data integrity and reduces manual errors.
- Integration with Tally for invoice generation facilitates accurate financial reporting and analysis.
- Improved financial transparency and efficiency in billing processes.