

Quote Tool

Case Study

Project Summary

Megh Technologies designed and developed quote tool application for one of client in manufacturing of water pump and doing smart city projects in India from which users can easily creating quote for their prospects with margin approval workflow. Here application providing pricing to sales team and channel partners.

Application Detail & Features

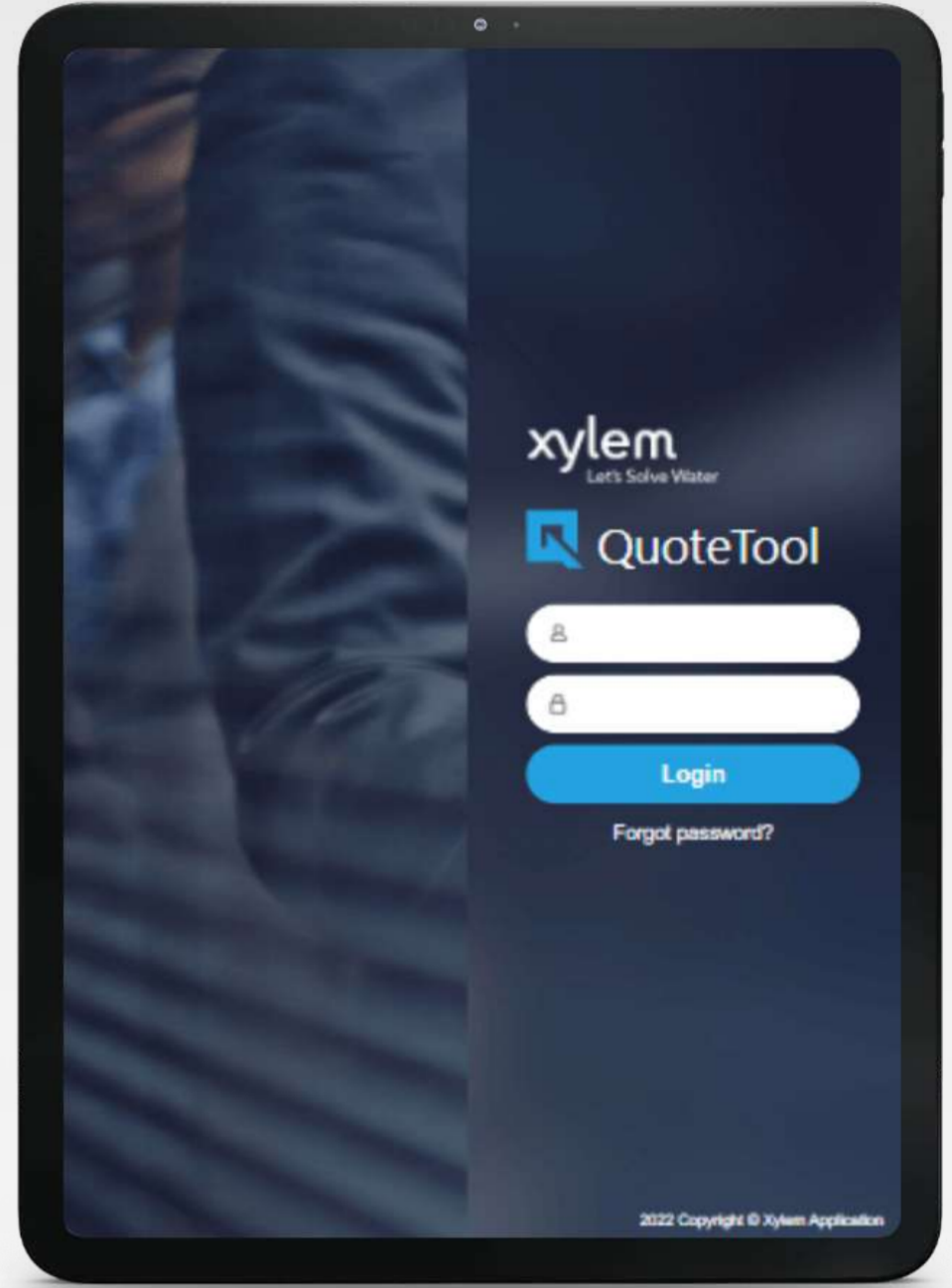
This application allows users to simply supporting to create quote and getting margin approval from management.

Sales team and channel partners can access real-time availabilities of this tool anytime they want.

- Access from anywhere and anytime
- Getting final quotation file after approval from respective managers.
- Notifications on email of approvals
- Margin and prices are same for sales team and distributors
- Realtime reporting
- Easy to manage history of quotations and prices
- BTO can be convert into standard product with only one click after approval from respective managers
- Easy to manage all master data and margin by administrator
- Facility to give rights of access as per roles and responsibilities
- Devise friendly
- Data can be secure

Features

- Sales team and channel partners can create quote and revised quote from this tool.
- An application keeping all history of revised quotes for future references.
- There is facility to manage status of each quote like lost, won or under discussion.
- Web access for all users with confidential login facility
- Notifications are available on email.
- Approver can approve the quote from email.
- Margin wise multiple approval
- Products details and it's price manageable with multiple currency
- An application is managing history of prices
- Facility to create BTO products with respective approvals
- MIS for all users as per their access rights.
- Auto calculation for quotation for sales team and distributors



Challenge

- There are lot of manual calculation to make a quote which converted into automatic calculation with simple steps.
- Provide completed integrated Digital experience to sales team and channel partners.
- Integration of salesforce & ERP and develop API to communicate with it.
- Provide completed integrated Digital experience to sales team and channel partners.
- Making Approval system for margin as per roles and responsibilities of C Suites.
- Minimize the manual process to make a quote and getting approval.

Solution

Megh Technologies has developed handy web tool to create quote where sales team and channel partners create quotations and getting the approval from the management. It is integrated with Salesforce and Existing ERP for getting lead data and price data to make quotation.

Conclusion

We have successfully delivered and maintaining this cloud-based quote tool which used by more than 500 users to creating quote and getting approval from management for margin.

Technology

- Asp.net MVC
- SQL Server 2012
- Html 5, CSS2, JQuery