

Field Sales App Streamlines Sales Process and Improves Customer Relationships

Customer: A global leader in the industrial bulk packaging industry.

Size: >7000 employees

Region: USA

Industry: Manufacturing and Distribution

Profile: The client manufactures and distributes strap, stretch, and protective packaging consumables, tools and equipment. Their products protect goods during manufacturing, transport, and warehousing.

Services: Enterprise mobility

Business Need

Headquartered in Illinois, the packaging materials manufacturer is a well-known brand name when it comes to bulk transportation of goods. It has a long history of customer-focused innovations in materials, processes, and automation technology that has revolutionized the sector. With employees working in facilities throughout the US, Europe, and Asia, it maintains a leading position in the business through its global scale, broad product portfolio, and long-standing global customer relationships.

Although a leader in the industrial bulk packaging industry, the packaging materials manufacturer was facing several challenges in managing its sales process:

- Sales reps traveled across the assigned territories to visit potential customers on a daily basis but were unable to access and update the back office system (Microsoft Dynamics AX R3) while away.
- Sales reps took orders by hand. When they returned to the office, they manually entered orders into the Dynamics AX R3 system. Not only was this process time consuming, but it was prone to human errors due to manual entry of orders.
- While sales reps were out of the office, they were unable to solve customer cases/complaints in a timely manner.

- Sales reps lacked real time access to contacts, leads, opportunities, and tasks. This made it difficult for them to schedule/handle sales calls.

The packaging materials manufacturer realized the need to modernize its sales strategy. They wanted to develop a mobile sales app that could streamline sales process, allowing sales reps to manage orders efficiently and address customer cases/complaints effectively, in real time. In addition to this, they wanted to integrate this mobile sales app with their Microsoft Dynamics AX R3 system for easy and fast order entry and update.

Solution and Approach

In order to help the packaging materials manufacturer streamline sales process, provide sales reps with complete access to accounts, contacts, leads, and opportunities, and facilitate them to resolve customer cases/complaints faster, Synoptek (formerly Indusa) developed an intuitive and comprehensive mobile sales app.

The mobile sales app used the Xamarin framework (a cross-platform development tool) and was tailored to run on Android and iOS. To provide easy integration these platforms, Realm mobile database was used.

Salient features of the app:

Synoptek worked closely with the packaging materials manufacturer to define and implement the key features of the mobile sales app:

- *Lead and opportunity management*
Sales reps can stay updated on leads and opportunities and accelerate the sales cycle while away from desk. New leads appear instantly in the mobile sales app as they are assigned in the Dynamics AX ERP system.
- *Customer management*
Sales reps can view all the customers mapped to their user ID. They can quickly manage customers and view sales quotations and sales orders linked to the customer. They can also search a customer by name, job title, email ID, and phone number.
- *Activity management*
Sales reps can schedule and manage activities directly from the mobile sales app – they can quickly access, create, and modify planned activities.
- *Sales quotation management*
Sales reps can add new sales quote, edit the existing, or view other sales quotes along with the status including cancelled, lost, created, and sent. They can also search a sales quote by name, account, and date posted.
- *Sales order management*
Sales reps can view all the sales and return orders mapped to their user ID. They can quickly add/edit sales orders, and can search a sales order by name, account, date posted, and status.
- *Product details*
The mobile sales app enables sales rep to have the entire product catalog on their device for quick access and a better demonstration to the customer. They can search for a particular product or can choose from the product listing to view all the details about a product.

- *Customer case/complaint management*
The mobile sales app allows sales reps to gather all customer cases/complaints into one common help desk system where they can categorize, assign, and resolve them with ease.
- *Consignment management*
Sales reps can view lists of all the active consignments created, and can filter them based on the name of the customer, product, type, date, and status.
- *Reports*
Sales reps can review key reports, such as pipeline analysis, top opportunities, and top sales orders to prioritize actions in order to achieve sales objectives in the most efficient manner.

Dynamics AX integration:

The mobile sales app is seamlessly integrated with the Dynamics AX R3 system. Data is synced between the mobile app and AX with the help of web services - whenever there is any record created/updated/deleted in AX, mobile device instantly receives the push notification regarding it. This enables sales reps to have access to the most recent customer and order information on their fingertips.

Offline access:

The offline access feature gives sales reps full order registering capabilities regardless of whether they are connected to the internet. They can access and search the product catalogue and register and confirm the entire order. As soon as the sales rep gets connected to the internet, the order syncs to the Dynamics AX system.

Business Results

Developing the mobile sales app has allowed the product materials manufacturer streamline and standardize the sales process. Sales reps can plan visits, access relevant sales information in real-time, and create orders on-the-go. They don't have to spend time doing low value-add activities such as data entry.

The mobile sales app allows sales reps to maintain a perfect database of all their customers, thereby helping them to view customer information in a single place for convenient future reference and follow-ups.

With the mobile sales app, customer case/complaint management is no longer an issue. Sales reps can track and resolve complaints effectively and in a timely manner. This has helped them reduce incoming complaint numbers.

Integrating the mobile sales app with the Dynamics AX R3 system has helped the product materials manufacturer save valuable time and effort. When new inventory is uploaded or a sales order is entered to the Dynamics AX system, the information automatically syncs to the mobile sales app. With this, sales reps stay updated and serve customers with the most recent information. This has not only increased potential sales

opportunities but also improved customer relationships.

The offline feature has improved the productivity of sales reps in areas with patchy or no network connectivity. They can now access critical sales information including opportunities, contacts, activities, and order information in real time and seamlessly transition between online and offline access.

The use of mobile sales app has allowed the product materials manufacturer to enter into a new realm of sophistication. The sales process is simplified and more engaging. In a nutshell, the mobile sales app has saved both time and money for the product materials manufacturer, and the productivity of its sales reps has increased phenomenally.

About Synoptek

Synoptek is a Global Systems Integrator and Managed IT Services Provider offering Comprehensive IT Management and Consultancy Services to organizations worldwide. Our focus is to provide maximum "business value" to our clients enabling them to grow their businesses, manage their risk/compliance, and increase their competitive position by delivering improved business results.