



# Velociti SALES FORCE AUOTOMATION



**NAVITSA**

## Administration Module

- ✓ Company Creation
- ✓ Distributor Master
- ✓ Multi-Currency Configurations
- ✓ System Generated Email & SMS Cost of Ownership)
- ✓ Transaction Backdate Permission
- ✓ Audit Trial
- ✓ User Permission Management
- ✓ User Configurable Multi-Layer Workflows

## Procurement Module

- ✓ Supplier Master
- ✓ Supplier Credit Control
- ✓ Purchase Order - Standard Form
- ✓ Automated Purchase Order - Based on Dynamic Parameters
- ✓ Goods Receive Note
- ✓ Purchase Invoice
- ✓ PO - GRN - PI link
- ✓ Supplier Returns
- ✓ Supplier Discount - Fully Customizable Schemes
- ✓ Supplier Promotions - Automated Schemes
- ✓ Inventory Cost Allocation - Shipment Charges / Travelling Etc.

## Procurement Module

- ✓ Product Master
- ✓ Multiple Pricing - Price List Setup
- ✓ Product Movement Method Tracking
- ✓ Product Discounts - Customizable Discounting Schemes
- ✓ Multiple Warehouse Management
- ✓ Stock Transfer
- ✓ Stock Adjustments
- ✓ Stock Take
- ✓ Stock Allocation
- ✓ Expiry Management

## Sales Module

- ✓ Customer Master
- ✓ Customer Credit Control - Customizable Configurations
- ✓ Sales Order
- ✓ Sales Order Bulk Upload
- ✓ Sales Invoicing
- ✓ Item Dispatch
- ✓ Delivery Acknowledgement
- ✓ Delivery Plan
- ✓ Additional Charge Allocation
- ✓ Customer Discount - Fully Customizable Schemes
- ✓ Sales Promotions / Free Issues - User Configurable Schemes
- ✓ Customer Returns

## Mobile Application Module

- ✓ Real Time Graphical Dashboard - Customizable
- ✓ Order Taking (Pre-Sale)
- ✓ Order taking (Van Sale/Pre Sale)
- ✓ Sales Order Suggestion - Through Past Data Analysis
- ✓ Customer Returns
- ✓ Payment Collections
- ✓ Settlements against outstanding Invoices
- ✓ Cheque Deposits
- ✓ New Outlet capturing
- ✓ New Outlet capturing - Live billing
- ✓ Image capturing
- ✓ Route Planning Route Deviation Verification
- ✓ Delivery Acknowledgement
- ✓ Stock Management
- ✓ Discount/Free Issues - Customizable
- ✓ Data synchronization - Online & Offline
- ✓ GIS location capturing

## Reporting & Dashboard Module

- ✓ Standard Report & Dashboard
- ✓ SFA Analytics Tool - User Customizable Reports & Dashboard

# Functional Specifications

## Sales & Marketing

### Sales Order

Sales Orders can be recorded via the Backend or Mobile applications at the distributor location.

### Sales Returns

Sales Returns can be recorded via the Backend or Mobile applications at the distributor location.

Two types of returns are supported: Invoice Returns and Direct Returns.

### Sales Promotions & Free Issues

Sales Promotions & Free Issues will have to be configured through the Head Office, this will not be changeable by the Sales Representative. Based on the active setup, free items will be added to the order

### Price List Management

Different prices can be maintained through the price listings. One Selling price can be active at a given time (Retail Price / Bulk Price)

### Route Planning

A route can be planned for each sales rep through the backend application, this route will then be visible for the rep to follow throughout the day. Any deviations from this route will be captured based on the GPS tracking on the mobile.

### Day Start / End & Call Visit (Mobile)

When the Sales Rep starts the day, he will have to check in to the mobile application, where the system will capture the date, time & location.

When the day ends, user will again have to checkout signing off through the mobile.

### Online / Offline functionality & Data Synchronization (Mobile)

System will operate in the offline mode synchronizing automatically when the connectivity is available.

### Modern Trade Operation

Orders raised to modern trade customers will be send to the Head Office ERP through the integration.

### Modern Trade Delivery Returns

If any items are returned at the delivery point, system will record a return and pass the data to the Head office ERP.

### Manual Sales Bill Upload

An option will be provided to back-end users to upload sales orders, in case any are taken manually due to an unforeseeable event.

All manual bills can be collected at head office an uploaded to system through a system defined excel file format.

## Contact Us



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