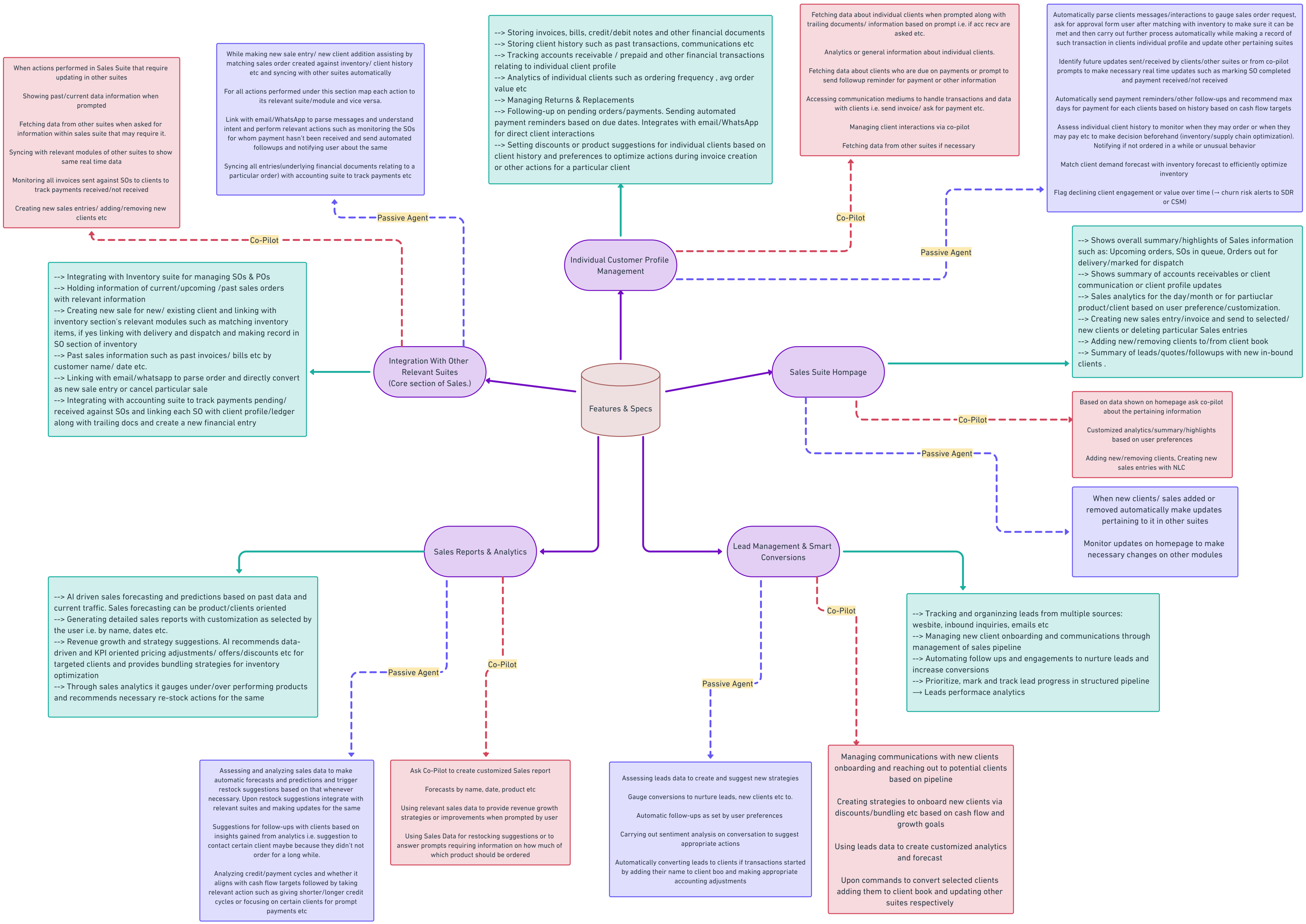
Features & Specs
Individual Customer Profile Management
--> Storing invoices, bills, credit/debit notes and other financial documents
--> Storing client history such as past transactions, communications etc
--> Tracking accounts receivable / prepaid and other financial transactions relating to individual client profile
--> Analytics of individual clients such as ordering frequency , avg order value etc
--> Managing Returns & Replacements
--> Following-up on pending orders/payments. Sending automated payment reminders based on due dates. Integrates with email/WhatsApp for direct client interactions
--> Setting discounts or product suggestions for individual clients based on client history and preferences to optimize actions during invoice creation or other actions for a particular client
Co-Pilot
Fetching data about individual clients when prompted along with trailing documents/ information based on prompt i.e. if acc recv are asked etc.
Analytics or general information about individual clients.
Fetching data about clients who are due on payments or prompt to send followup reminder for payment or other information
Accessing communication mediums to handle transactions and data with clients i.e. send invoice/ ask for payment etc.
Managing client interactions via co-pilot
Fetching data from other suites if necessary
Passive Agent
Automatically parse clients messages/interactions to gauge sales order request, ask for approval form user after matching with inventory to make sure it can be met and then carry out further process automatically while making a record of such transaction in clients individual profile and update other pertaining suites
Identify future updates sent/received by clients/other suites or from co-pilot prompts to make necessary real time updates such as marking SO completed and payment received/not received
Automatically send payment reminders/other follow-ups and recommend max days for payment for each clients based on history based on cash flow targets
Assess individual client history to monitor when they may order or when they may pay etc to make decision beforehand (inventory/supply chain optimization). Notifying if not ordered in a while or unusual behavior
Match client demand forecast with inventory forecast to efficiently optimize inventory
Flag declining client engagement or value over time (→ churn risk alerts to SDR or CSM)
Integration With Other Relevant Suites (Core section of Sales.)
--> Integrating with Inventory suite for managing SOs & POs
--> Holding information of current/upcoming /past sales orders with relevant information
--> Creating new sale for new/ existing client and linking with inventory section's relevant modules such as matching inventory items, if yes linking with delivery and dispatch and making record in SO section of inventory
--> Past sales information such as past invoices/ bills etc by customer name/ date etc.
--> Linking with email/whatsapp to parse order and directly convert as new sale entry or cancel particular sale
--> Integrating with accounting suite to track payments pending/ received against SOs and linking each SO with client profile/ledger along with trailing docs and create a new financial entry
Co-Pilot
When actions performed in Sales Suite that require updating in other suites
Showing past/current data information when prompted
Fetching data from other suites when asked for information within sales suite that may require it.
Syncing with relevant modules of other suites to show same real time data
Monitoring all invoices sent against SOs to clients to track payments received/not received
Creating new sales entries/ adding/removing new clients etc
Passive Agent
While making new sale entry/ new client addition assisting by matching sales order created against inventory/ client history etc and syncing with other suites automatically
For all actions performed under this section map each action to its relevant suite/module and vice versa.
Link with email/WhatsApp to parse messages and understand intent and perform relevant actions such as monitoring the SOs for whom payment hasn't been received and send automated followups and notifying user about the same
Syncing all entries(underlying financial documents relating to a particular order) with accounting suite to track payments etc
Sales Suite Hompage
--> Shows overall summary/highlights of Sales information such as: Upcoming orders, SOs in queue, Orders out for delivery/marked for dispatch
--> Shows summary of accounts receivables or client communication or client profile updates
--> Sales analytics for the day/month or for partiuclar product/client based on user preference/customization.
--> Creating new sales entry/invoice and send to selected/ new clients or deleting particular Sales entries
--> Adding new/removing clients to/from client book
--> Summary of leads/quotes/followups with new in-bound clients .
Co-Pilot
Based on data shown on homepage ask co-pilot about the pertaining information
Customized analytics/summary/highlights based on user preferences
Adding new/removing clients, Creating new sales entries with NLC
Passive Agent
When new clients/ sales added or removed automatically make updates pertaining to it in other suites
Monitor updates on homepage to make necessary changes on other modules
Sales Reports & Analytics
--> AI driven sales forecasting and predictions based on past data and current traffic. Sales forecasting can be product/clients oriented
--> Generating detailed sales reports with customization as selected by the user i.e. by name, dates etc.
--> Revenue growth and strategy suggestions. AI recommends data-driven and KPI oriented pricing adjustments/ offers/discounts etc for targeted clients and provides bundling strategies for inventory optimization
--> Through sales analytics it gauges under/over performing products and recommends necessary re-stock actions for the same
Passive Agent
Assessing and analyzing sales data to make automatic forecasts and predictions and trigger restock suggestions based on that whenever necessary. Upon restock suggestions integrate with relevant suites and making updates for the same
Suggestions for follow-ups with clients based on insights gained from analytics i.e. suggestion to contact certain client maybe because they didn't not order for a long while.
Analyzing credit/payment cycles and whether it aligns with cash flow targets followed by taking relevant action such as giving shorter/longer credit cycles or focusing on certain clients for prompt payments etc
Co-Pilot
Ask Co-Pilot to create customized Sales report
Forecasts by name, date, product etc
Using relevant sales data to provide revenue growth strategies or improvements when prompted by user
Using Sales Data for restocking suggestions or to answer prompts requiring information on how much of which product should be ordered
Lead Management & Smart Conversions
--> Tracking and organinzing leads from multiple sources: wesbite, inbound inquiries, emails etc
--> Managing new client onboarding and communications through management of sales pipeline
--> Automating follow ups and engagements to nurture leads and increase conversions
--> Prioritize, mark and track lead progress in structured pipeline
⟶ Leads performace analytics
Passive Agent
Assessing leads data to create and suggest new strategies
Gauge conversions to nurture leads, new clients etc to.
Automatic follow-ups as set by user preferences
Carrying out sentiment analysis on conversation to suggest appropriate actions
Automatically converting leads to clients if transactions started by adding their name to client boo and making appropriate accounting adjustments
Co-Pilot
Managing communications with new clients onboarding and reaching out to potential clients based on pipeline
Creating strategies to onboard new clients via discounts/bundling etc based on cash flow and growth goals
Using leads data to create customized analytics and forecast
Upon commands to convert selected clients adding them to client book and updating other suites respectively