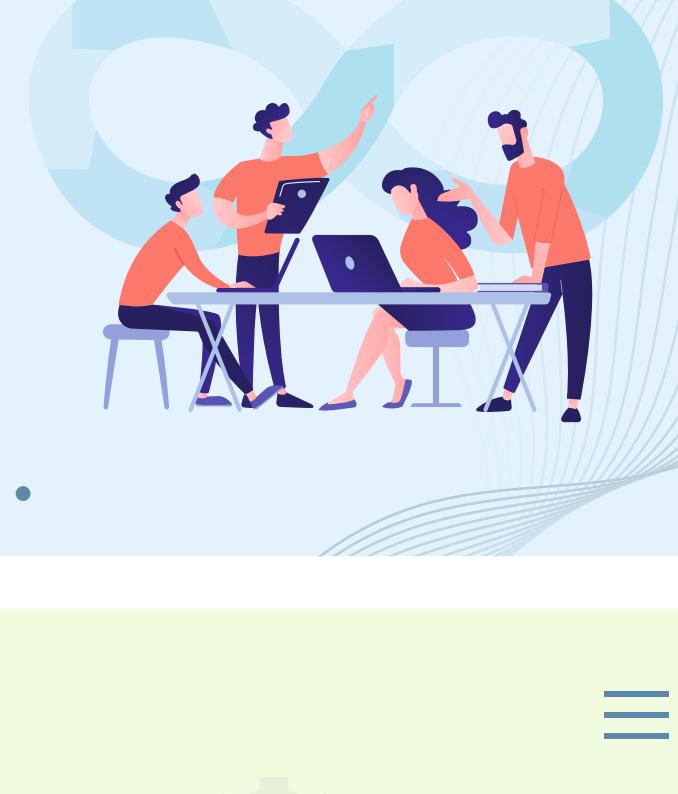


Transform your Business through Customized Workflows

Stack|N|Trace Workflow CRM

[Talk to Us](#)

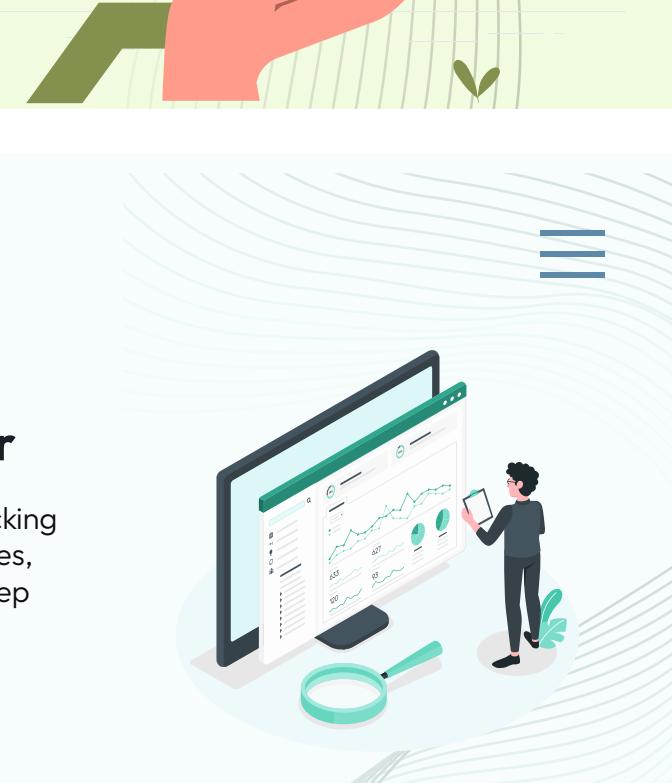
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Maximize Your Business Potential

Stack|N|Trace can create and automate your workflows with simple condition-based triggers to perform a wide variety of tasks, handling everything from start -to finish while the sales team can concentrate on winning deals.

[Request Demo](#)[Talk to Us](#)

• • •



Improve Tracking of Request Pipelines & Ship Faster

Stack|N|Trace CRM's advanced request pipeline tracking system provides complete visibility into your processes, empowering you to make informed decisions and keep the customers satisfied on their journeys..

[Request Demo](#)[Talk to Us](#)

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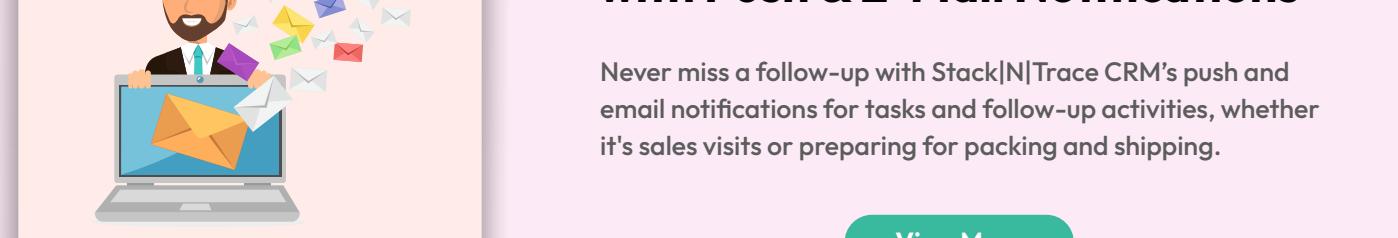
Get all your tasks in one place.

Features



Customized workflows with triggers

For scenarios where a sales request goes through various departments and processing stages Stack|N|Trace's workflow based solution with triggers and action items, such as approvals can come in handy for streamlining business operations



Identify bottlenecks with Pipeline view

Spot and resolve bottlenecks pertaining to a sales request using Stack|N|Trace's intuitive visual pipeline view where one can clearly see a request's path. Bottlenecks related to a group of requests can also be effectively troubleshooted using the pipeline view analysis for a range of requests.



End-to-end Task Management with Push & E-Mail Notifications

Never miss a follow-up with Stack|N|Trace CRM's push and email notifications for tasks and follow-up activities, whether it's sales visits or preparing for packing and shipping.

[View More](#)

INDUSTRIES

Industries that we serve



Flavour Industry

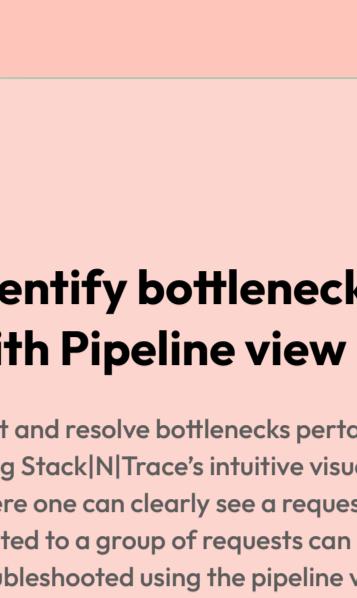


Seafood Industry



Other Industry

Features

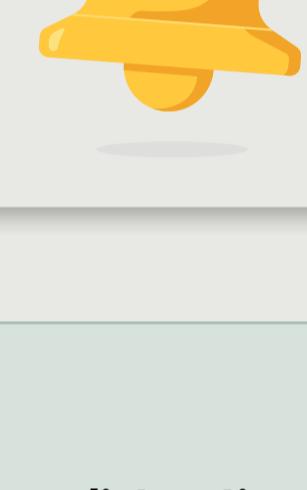


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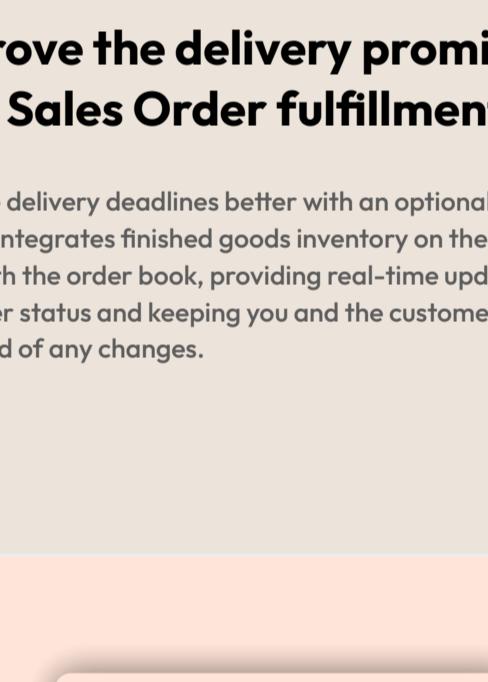


End-to-end Task Management with Push & E-Mail Notifications

Never miss a follow-up with Stack|N|Trace CRM's push and email notifications for tasks and follow-up activities, whether it's sales visits or preparing for packing and shipping.

Take charge of your team's follow-ups using the subscribe service

Want to monitor your team's follow-ups? Stack|N|Trace CRM, based on business rules, allows the sales head or a territory manager to subscribe to an associate member's follow-ups as needed to ensure that no follow-ups are missed during the day.

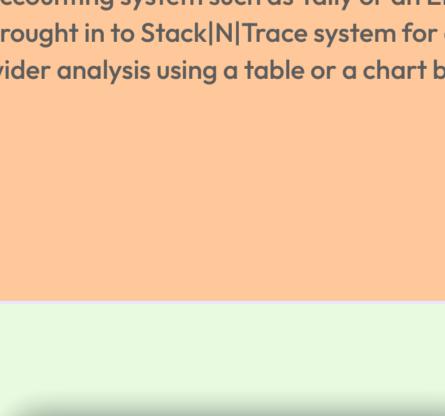


Optimum delivery of E Mail / SMS notifications with monitoring

Configurable from both the management's and user's end, the notification system features integration of email with email delivery service providers to ensure deliverability of emails along with deliverability reports..

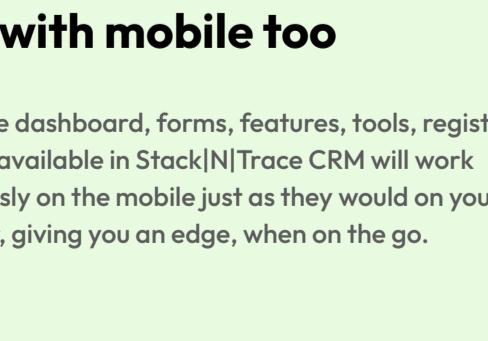
Reduce distractions and improve productivity with the help of our integrated chat tool.

Email threads running into pages will be a thing of the past. With Stack|N|Trace CRM chats are confined to the realm of a specific request, making it less cumbersome for the operations team to digest the messages and take lucid action. Share files annotate just like you would do on your social network.



Improve the delivery promise with Sales Order fulfillment.

Manage delivery deadlines better with an optional add-on that integrates finished goods inventory on the shop floor with the order book, providing real-time updates on the order status and keeping you and the customer informed of any changes.



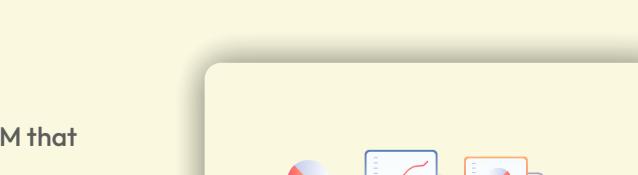
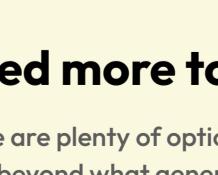
Docs, on the fly

Stack|N|Trace CRM creates all necessary shipping documents in one go from the order area without the need for copying and pasting between different files.



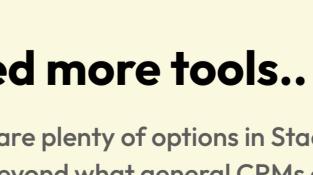
Stay in Control of your sales and ops with our Dashboards

While sales and operations go about their tasks, the management can get a bird's eye view of each of the major activities handled by the Stack|N|Trace CRM through a comprehensively engineered set of dashboards/ analytics. Get the big picture for each set of activities performed inside the system and drill down to the basics whenever required.



Stay in touch with the past with our data migration tools

If past sales data has been maintained on an accounting system such as Tally or an ERP, they could be brought into the Stack|N|Trace system for quicker and wider analysis using a table or a chart based approach.



Need more tools..

There are plenty of options in Stack|N|Trace CRM that goes beyond what general CRMs offer. These include:

Price calculator option for shipments comprising multiple items

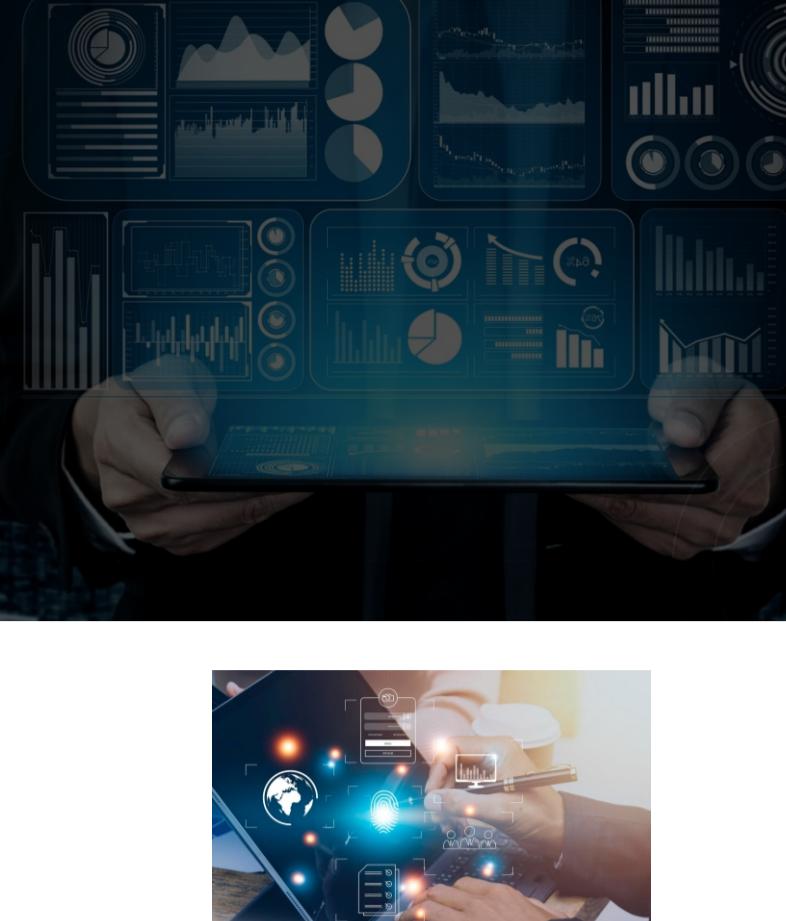
Inventory Management Module (Q1 2024)

Purchase Module (Q1 2024)

Asset Management Module (Q2 2024)

The Flavour Industry

When samples become an integral part of your business, The Stack|N|Trace Workflow CRM can become a crucial factor in driving profitability and growth

[Request Demo](#)
[Talk to Us](#)


Mission Modes

Sample / Application Requests

Creation and channeling of requests for samples for varied applications and segments to members of ops team for verification, preparation and shipping.

Sales team members could create multiple samples per request with varied units of measure along with their segment details and price sought.



Module Benefits

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Quisque eu nibh id dui lobortis pharetra sed et nisl. Morbi placerat quis nibh at consequat. Aenean lobortis iaculis mauris, quis luctus.

Request Tracker

Visual tracking of the request in the form of a pipeline view to track each sample, its variant or equivalent and their status across various stages.

Intra Dept - Interaction

Option to interact between sales team and varied ops department members at each stage using a built-in chat tied to

Features

1. Dashboard for Sample Requests

- a. New vs Existing Samples count
- b. Samples delivered vs orders taken count
- c. Request Status
- Shows request counts based on new, in progress, on-hold, rejected, in progress and closed
- d. Lead time
- Based on business rules for a request type, the system shows the count of requests that have exceeded the lead times given.
- e. Department wise classification and count
- Request count based on departments R & D, Logistics and so on
- f. Application based classification
- Bakery, Beverages, Confectionery and so on.
- g. Stages and Events
- At each stage, there are multiple events and the requests are grouped accordingly

2. MIS for Samples

- a. Process pipeline events and count
- Users based on assigned privileges could get to the counts at stage and also drill down to the requests.
- b. Search filters by salesperson / customer
- Salespersons could use this filter to make a list of samples they are under evaluation before a field visit.



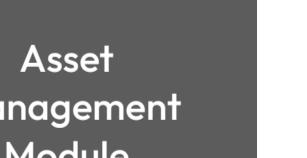
Sales Order Management System



Price Calculator for multiple product based shipments



Sales Register of Historical Sales Data



Shipping Docs, Inland & Export Sales

Add Ons

Transform your business with

Inventory Management Module

Purchase Management Module

Asset Management Module

Visual tracking of the sample status

in the form of a pipeline.

Each node in the pipeline tracks each sample, its status, its equivalence and their

status across various stages.

Notification system similar to facebook/

providing alerts for new

updates or whenever a

comment is made with the

application.

SYSMIS

Gain actionable insights on exceptions and anomalies and reduce customers in real time.