

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.

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.

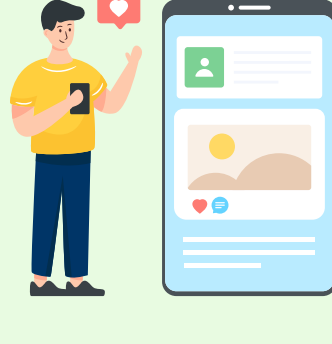


Stay in Control of your sales and ops with our Dashboards

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 brought in to Stack|N|Trace system for quicker and wider analysis using a table or a chart based approach.



Built for the cloud but works well with mobile too

All of the dashboard, forms, features, tools, registers, reports available in Stack|N|Trace CRM will work seamlessly on the mobile just as they would on your browser, giving you an edge, when on the go.

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)

