Stack|N|Trace CRM Website

Broad site structure

Phase 1

Home / Landing page(s), Features, Industries / Solutions, About Us, Careers, Contact Us.

Home

Header

Stack|N|Trace Workflow CRM

Transform your business through customized workflows

Scroll 1

Heading (with suitable image)

Maximize Your Business Potential with Stack|N|Trace - Your Trusted CRM Solution.

Text (below scroll)

Revenue-generation activities warrant tons of little tasks that require your attention. With Stack|N|Trace Workflow CRM, businesses can create and automate their 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.

Deliver more to the business line

CTA buttons

'Request a Demo'. 'Talk to Us'

Scroll 2

Heading (with suitable image)

"Improve tracking of request pipelines & Ship Faster with Stack|N|Trace CRM"

Text (below scroll)

When managing customer journeys, the operations team may miss important markers due to a high volume of sample requests or orders from the sales team. 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..

Upgrade to Stack|N|Trace CRM today!

CTA buttons

'Request a Demo'. 'Talk to Us'

Content for home:

Build strategic workflows for your business. Gain more autonomy for teams and faster time to value.

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Get all your tasks in one place. Macro-views, to granular details- know the status of everything, anytime.

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Do more with less. Well-orchestrated workflows help you prioritize, standardize and execute processes quickly and accurately to improve customer experience.

|
Manage disruptions and bottlenecks efficiently. Gain actionable intelligence on exceptions and anomalies and respond to customers in real time.

|
Get Sales and Operations on the same page. Go from easy conversations to higher conversions with cross-functional alignment of activities.

|
Go from less work to more business.

With Stack|N|Trace Workflow CRM you not only gain effective control on day-to-day operations, but also stay streamlined and ready for what's next. More than a tool, it is an intuitive strategy that delivers efficiency, productivity and better business outcomes.

CTA buttons
Request a Demo. /
Talk to us

Features

Customized workflows with triggers

Customized workflows can help you stay in control of your business operations. Imagine a scenario where a sales request must go through different departments and multiple processing stages within each department. At each stage, there may be a need for triggers or action items. An example of an action item could be an approval from a member of the operations team working in a higher role. In such a situation, a workflow-based solution would be the perfect choice for a business. Stack|N|Trace features a powerful workflow module that can be customized to address most needs. It can ensure that request validation and channeling are done at the basic levels so that there is no flooding at the operations level.

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 be also be effectively troubleshooted using the pipeline view analysis for a range of requests.

End-to-end Task Management with Push & email Notifications

Never miss a follow up, that's the promise of Stack|N|Trace CRM. Sales related tasks such as follow ups for acceptance and confirmation of proposals or evaluations done at the customer's end require extra tracking effort. WIth Stack|N|Trace CRM, it's a breeze, the system automatically collects any follow-up related activity and sets an alert for the sales person on the appointed day using both **push notifications** and **email notifications.** The task-oriented follow-up system extends to the operational aspects of the process. This allows the logistics team to proactively prepare for packing and shipping as soon as samples or items related to a sales order are ready for dispatch.

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 EMail / 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. Stack|N|Trace CRM now serves as the primary communication medium between sales and operations for any request or order. Communication can be exchanged in chats, and chats are also 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.

If you are concerned about meeting delivery deadlines for multiple orders, Stack|N|Trace CRM can help streamline the order process. The system tracks the order from the moment it is added, including the ship-by date, and creates all necessary shipping documents in one go without the need for copying and pasting between different files. **Moreover**, the system includes an **optional add-on** to integrate 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.

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 by Stack|N|Trace CRM 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. This data could in turn be used by the sales team to understand the sales potential for a period or region or a set of products being dealt by the business.

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)

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Industries / Solutions

The Flavour Industry (Sub-menu)
The Seafood Industry (Sub-menu)
Others (Sub-menu)

The Flavour Industry (Sub-menu)

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.

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

- 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.
- Option to interact between sales team and varied ops department members at each stage using a built-in chat tied to the specific request.
- Options to roll back accidental data entries from a user's end based on a valid set of business rules similar to that of slack's.
- Notification system that is similar to facebook/ linkedin providing alerts for tasks, updates or whenever a comment is made within the application.
- Auto and manual prioritization of requests based on request type and business rules.
  Follow-ups are automatically created whenever a sample delivery is complete for the next stages of evaluation and approval.
- If a sample dispatch does not translate to an order then the system creates a feedback submission task for the salesperson to complete the loop and re-open the request for a fresh dispatch of samples should the customer want one.

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 each 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 that are under evaluation before a field visit.
3. Auto creation of master entries at request level, on an approval basis.
   Flavors, seasonings and segments though master entries however exhaustive could require additions on the fly from the salesperson's end. While the request would go through with all the entries, they would still require vetting from the Product Manager's end. If approved they would become visible for other users in the salesperson's role.
4. Undo operation for a set of changes for users
   Users could make a set of changes but yet want to roll back the entire set of changes in a particular block including reversal of date entries. The system allows users to do so provided the business rules match. The feature is similar to slack's delete feature but with a lot more bells and whistles.
5. Historical logs
   Given that each sample being prepared and shipped could go through multiple entries at each stage / event, the system tracks and provides a history of the logs when required.

Supportive Modules

- Sales Order Management System
- Price Calculator for multiple product based shipments
- Sales Register of historical sales data
- Shipping docs, Inland & Export Sales

Add ONs

- [ ] – Inventory Management module (Q1 2024)
- [ ] - Purchase Management module (Q1 2024)
- [ ] - Asset Management module (Q2 2024)

The Seafood process Industry (Sub-menu)

Mission Modes

Sales Order Fulfillment

A salesperson or a member of the ops team creates a sales order for export or inland shipment with multiple line items. The shipment transit could be one of Road / Sea and also a container based one or a LCL one such as an air shipment. The order data would include a ship by date and reference information.
Somewhere else, in the production area, the supervisor of a production team runs on his phone Stack|N|Trace's finished goods app. This app pulls in all order data on wakeup and then attaches the batched production data containing uniquely coded QR codes to the order data. The cycle continues for hours, days, weeks, months until the order's requirements are completed.
If the finished item is being made out to stock, order details are skipped and codes generated. The generated code along with finished item details are stored on the devices and periodically sent to the cloud. Since network connections can be spotty, the system queues the data on the device and sends it out whenever users choose to. The resultant bulk transfer of data is pretty quick and doesn't interrupt the Android device's primary thread.
As the labeled items move through the shop floor, they get scanned at various locations, the scanning devices are in turn paired to android devices running a scan app which then store these unique codes along with their location. These are also periodically sent to the cloud.
The generator and the scanner apps that send out the generated QR code logs and the scanned QR codes logs talk to a cloud app running a service layer that synthesizes the logs in real time and provides accurate stock data including varied analytics for other end users logging in to the cloud application.
There is also a lookup app which can be used along with the phone's camera or a paired scanner to scan a packed item to understand its contents including batch codes, lot nos. and the sequence of events that the packed item went through.
The QR codes are configured such that only basic data that is required for the public realm are available for external users. Internal users can use the lookup to get to know more specific data such as the lot no. pertaining to the raw material used in the finished item and so on.
Since the sales order id has been added to the labels on the finished goods, the production head or a member of the sales team can now visit the sales order area and at the click of a few buttons find out in real time as to how far the shipment is ready and also validate shipments that have already left.

Module benefits

Business benefits that you will enjoy with Stack|N|Trace's Sales Order Fulfillment solution will include;

- Centralized system for tracking and managing orders from multiple sales channels, with real-time updates on order status and inventory levels
- Real -time updates of inventory management levels including varied analytics and options to look up just like how users would do so for a particular item on amazon.
- Communicate clearly to the logistics about container, transportation and freight needs.
- Communicate clearly to customers regarding their order status, shipping details, and delivery updates.
- Decision making pertaining to purchases, inventory management and pricing.

Features:

1. Dashboards for Sales Order

a. Delayed orders, Orders that need to be shipped on priority.
   By automatically flagging delayed orders and other orders that need to be shipped within a few days, the ops team is made aware of the shipment priorities.

b. Monthly Orders vs Shipments trend
   The system provides both the operations and the sales team a macro level view of how far their goals have been met.

2. Days Remaining & Current Status
   Auto Calculation of days remaining and current status of shipment helps the logistics and the accounts receivables team coordinate delivery and receipt.

3. Product In / Out Registers
   List of items being taken in and out of a given set of warehouses based on date criteria.
   Features drill down right down to QR code
4. Stock Summary Register
   Groups finished items and lists items produced on a transaction basis.
5. In- stock register
   Apart from listing all the items in the warehouse space, look-ups are available similar to that of an amazon product finder so that users could filter out the items based on varied criteria including made to stock, made to order, pack type and so on.
6. Aging Register
   The Aging Register allows you to have a clear view of the age of your inventory items. You can easily track and monitor how long items have been in the warehouse, helping you identify slow-moving or stagnant stock.
   Based on the aging register, actions to reduce holding costs can be taken up, including offering discounts, promotions, or implementing strategies to sell or liquidate aging inventory.
7. Production dashboard
   Features varied charts that list the goods produced in different units across varied points in time. The system lists by default production charts based on current day / week / month. Users have choices for looking at past data too.
8. Role based security
   Based on assigned roles, page views and activities can be controlled for users.
9. Shipping Docs
   In a single click shipping docs like Proforma, Packing List / Delivery Note, Invoice , Commercial Invoice (exports) can be generated from the system with the help of preloaded templates. At each stage the users enters only additional data leading to adding redundant data entry and avoiding erroneous mistakes.
10. Shift Locks and reports
    As production units generally run on multiple shifts, the system allows for cut-offs for reports base on shifts using settings.

Supportive Modules

- Price Calculator for multiple product based shipments
- Sales Register of historical sales data
- Shipping docs, Inland & Export Sales

Add ONs

- [ ] – Stores Management module (Q1 2024)
- [ ] - Purchase Management module (Q1 2024)
- [ ] - Asset Management module (Q2 2024)
- [ ] - Raw Material Management (Q3 2024)
- [ ] - Production Management (Q3 2024)

Others (Sub-menu)

The Stack|N|Trace Workflow CRM is designed to cater to the requirements of various manufacturing industries including;

Cashew Process Units
Coir Pith Manufacturing Industry
Consumable & Electronics Manufacturing
Export Process Units

Stack|N|Trace Workflow CRM offers multiple opportunities to streamline your sales and operations and provides business benefits that can help you move ahead of the competition. These include;
Gin insights on sales conversions
Track key metrics for better visibility and control.
Ensure consistent quality control by standardizing processes and monitoring quality in real time.
Detect errors, flag compliance issues to reduce risks of recalls and reputation damage.

Additionally, in the service sector Stack|N|Trace Workflow CRM can be tailored to the needs of
Training skills industry

In general, if you require the following activities to be managed well
Or if you hail from any of the above industries or if your needs are unique, Please feel free to give us a call.

About Us

Ever since its inception in 2003, Sysmix has helped several hundred customers consistently solve business challenges. The solutions developed by Sysmix have gone beyond adapting to customer's needs by unlocking hidden information in the form of actionable insights.

Mission critical inventory applications tend to be usually complicated, Sysmix has broken down this complexity by providing solutions with an obsessive focus on ease of use.

The market share for our Stack|N|Trace Workflow CRM solution has been growing steadily since the last few years. Proven, professional and practiced, customers across verticals- Single Point Manufacturers & Businesses to Multi-Location based ones are discovering Stack|N|Trace's superior features, stability on the cloud and pricing and benefiting from the solution.

Call us on +91-98840 37476 or email us on sales@sysmix.com. We will be happy to tell you how Stack|N|Trace Workflow CRM can make an impactful change to your business.

Careers

Employees at Sysmix enjoy the challenge of working at the forefront of a dynamic, competitive and rapidly evolving industry. The Company takes every effort to guide and direct individual career aspirations towards a successful goal. Fair and consistent in implementation of people management practices, the Company is committed to ensure equal opportunity based on merit.

Write to us at jobs@sysmix.com if you possess the skills required to work with us.

Contact US

Let’s Talk.

CONTACT DETAILS

+91-98840 37476
sales@sysmix.com

Reach Us

ADDRESSS

Sysmix Infotech Pvt Ltd 6/22, AK Block, 6th Cross, 11th Main Road, Anna Nagar, Chennai – 600 040. Tamil Nadu, India.