

# SALES MANAGEMENT SYSTEM

[sales.viewiss.com](https://sales.viewiss.com)



**INNOVATIVE SOFT SOLUTIONS**

[WWW.VIEWISS.COM](http://WWW.VIEWISS.COM)

# Importance of your sales team.

- ✓ Sales team is the frontend army of an organization to protect and grow the business.
- ✓ Sales team is the face of the organization to customers.
- ✓ Customers judge the supplier through the response, support, timely feedback of sales engineer of their supplier.
- ✓ Unfortunately, many organizations do not give the due importance and support to sales team on timely feedback/information so that they wouldn't be in a sorry position in front of customer.
- ✓ Effectively serving customer is the key for success in business. Have your sales team be effective on this?

*We are not doing a favor to customer by serving him. He is doing us a favor by giving us an opportunity to do so*

*- Mahatma Gandhi*

**This software aims to create good coordination between sales team with rest of organization by providing customer connected live information to sales team right in his mobile without asking any one!**

# Are you really managing your sales effectively ?

- ✓ Do you track the budget vs Actual performance frequently (at least once in a week) for each region, each customer, each Product, each sales Engineer?  
*Setting and reviewing goals is the first step in turning the invisible into the visible." -Tony Robbins*
- ✓ Do you get live graph on the ON-TIME delivery performance for any period, for any customer, for any region in your mobile?
- ✓ Have you given facility for all your sales engineer to track their own performance, which customer/Product they are losing, what are orders they could not service ON-TIME.
- ✓ Do your sales team know the current status of an order in their mobile at any point of time without asking anyone?
- ✓ Can your sales people see the payment status of any customer in their mobile while sitting in front of customer for right follow up?

**If your answer is NO for few questions, then there is scope to improve. Our software supports you on this all 24 hrs right in your mobile.**

## *Our software Features*

It is an ON LINE, web based application accessible from anywhere in all 24 hrs X 7days to connect your Top management , Sales , Planning, Production and Despatch functions located in different geographical locations to share single set of customer Orders progress /Status thro their mobile/Tablet/Computer.

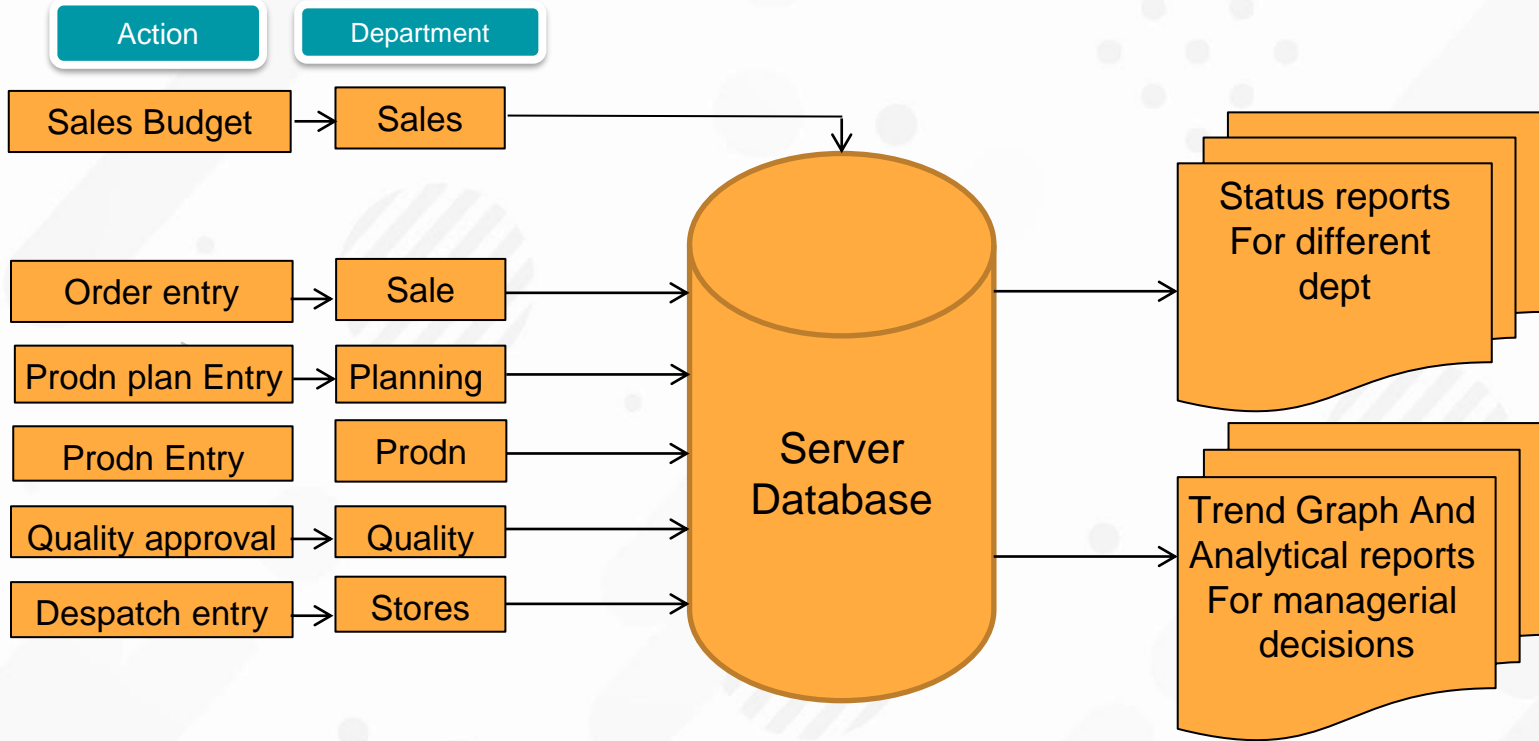
# Features

- ✓ **Dashboard with graphs** to show live data on key elements of sales management.
- ✓ Highly secured, end-to-end encrypted data transfer (https site). Hence no one can steal the data.
- ✓ User-based restriction to access information. **It can be set or altered at anytime by the System Administrator in your organization without our involvement. Unwanted information can't be seen by anyone even within your organization.**
- ✓ It is hosted & maintained by us in **our / your cloud server**. You can access the data anytime from anywhere across the world!

More suited for –

- Organization with many customers and many products.
  - Organization with customers spread in wide geographical area.
  - Organizations with multi-plant locations/Sales offices spread across wider geographical area.
  - Medium/Small organizations where it is un-economical to install IT infrastructures & maintain it at their end.
- ✓ Paperless system. Access to all stack holders in an organization for sales connected information. No need for any other communication methods like Email, Phone etc.,
  - ✓ Powerful & Live Analytical reports to the management downloadable in to your computer as excel file.

# System Flowchart



# Dashboard

Menu list to go to respective screen

Many charts are there that are not seen in this screen because of size. In actual software, you can scroll down and see. For clarity, each item in the dashboard is shown in separate slides now onwards.

**Sales Mgmt**

DATA ENTRY

- Forms

MIS REPORTS

- Daily Reports
- Trend Charts
- Status

MASTERS

- Data Entry

Dashboard / Admin

### Yesterday Stats

₹ 8.2 cr  
current month sales

|                     |                          |                        |
|---------------------|--------------------------|------------------------|
| ₹ 42.5 lac<br>Sales | ₹ 43.9 lac<br>Production | ₹ 36.2 lac<br>Despatch |
|---------------------|--------------------------|------------------------|

₹ 970.1 lac Sales (cur month)  
₹ 990.1 lac Production (cur month)

#### Day-Wise Sales

₹ 8.2 cr  
cur month

[DETAILS](#)

#### Last 6 Months Sales Trend (in lac)

| Month  | Sales (lac) |
|--------|-------------|
| Apr-20 | 42.5        |
| May-20 | 43.9        |
| Jun-20 | 36.2        |
| Jul-20 | 42.5        |
| Aug-20 | 43.9        |
| Sep-20 | 36.2        |

#### Group-wise Products

# Dashboard

## Yesterday Stats



As on now

₹ 8.2 cr

current month sales

Yesterday data

₹ 42.5 lac

Sales

₹ 43.9 lac

Production

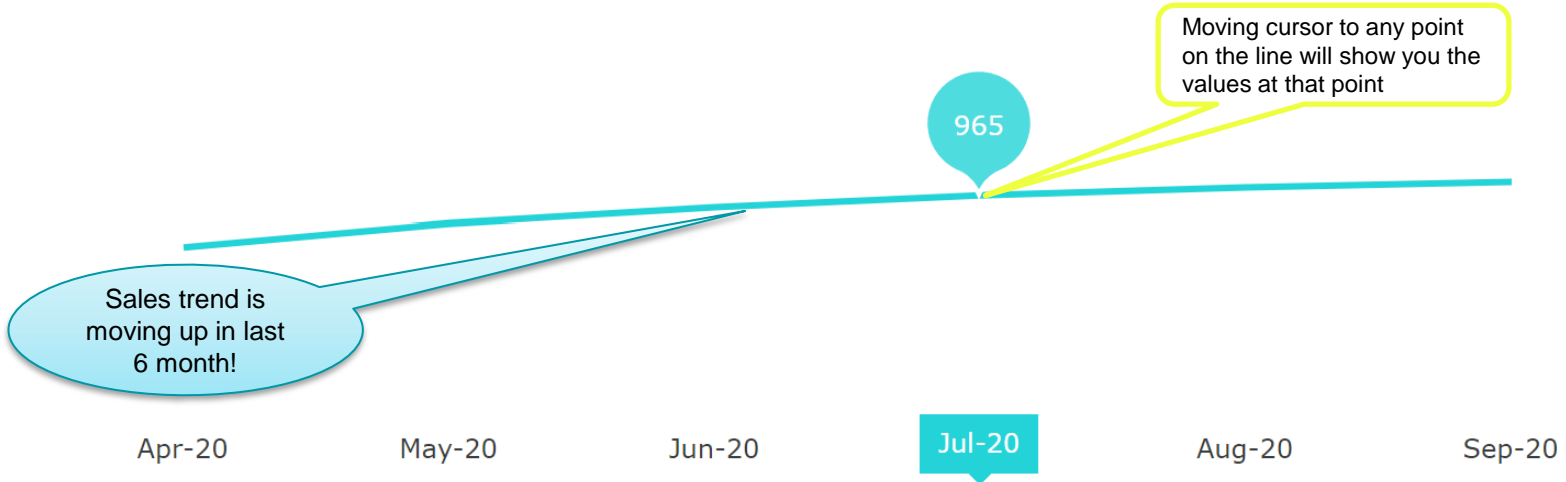
₹ 36.2 lac

Despatch



# Dashboard

Last 6 Months Sales Trend (in lacs)



# Dashboard

Order Execution Ratio (last 30 days)

...



Forecast Vs Order Received

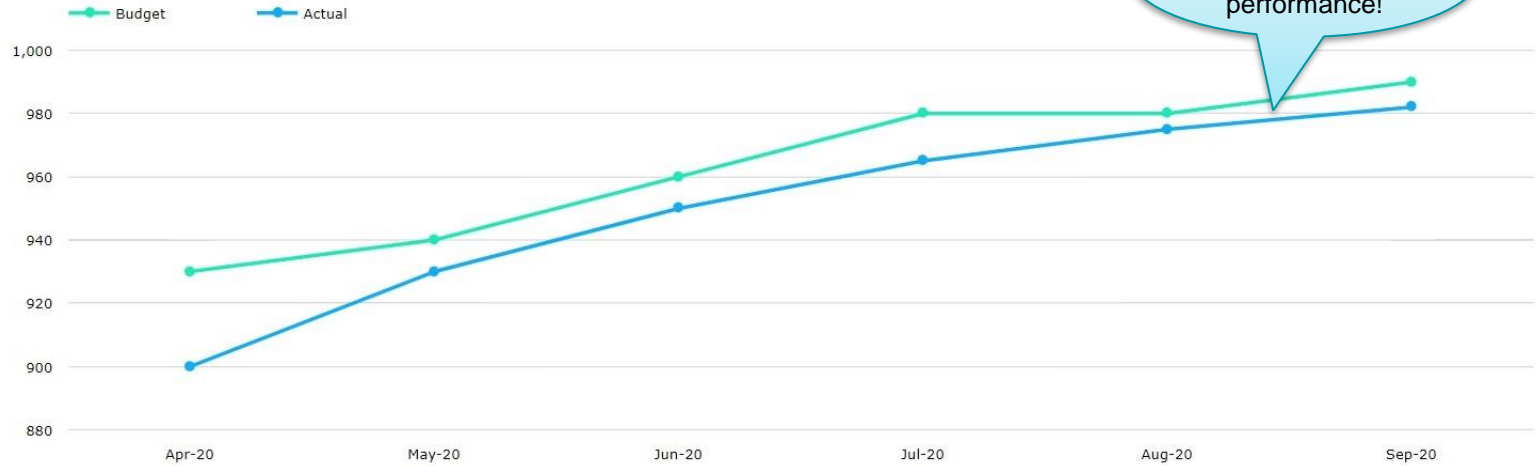
Higher forecast  
variance. Need  
attention.



On-Time Delivery

# Dashboard

Budget Vs Actual (in lac)



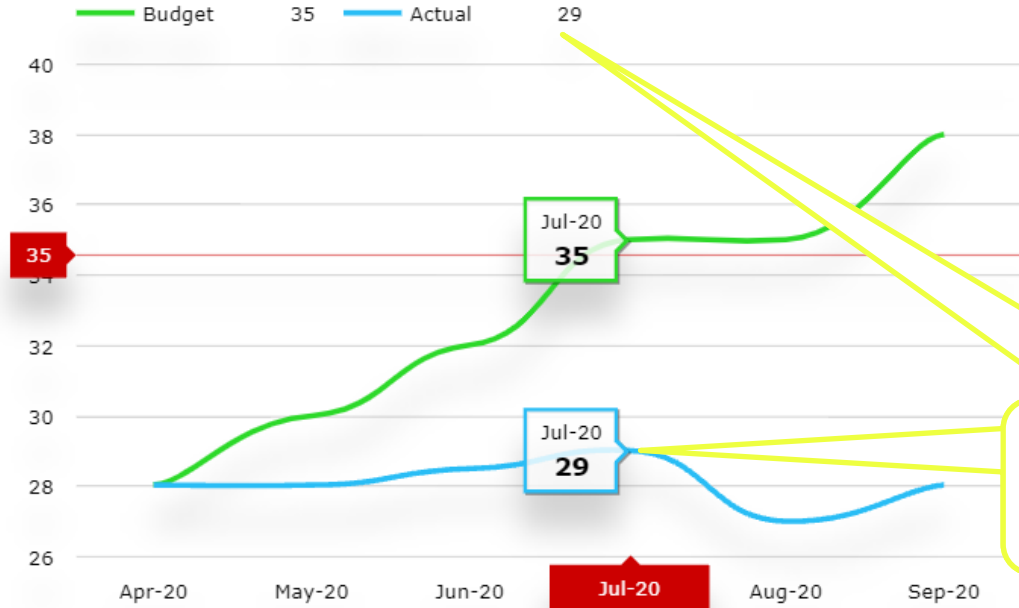
# Dashboard

Top 7 Customers Dropping Sales

Cus1 ▾

You can select any customer in the drop down to see its graph.

The drop down list is arranged such that the poorest performer appears in the top



In all our graph, when you keep your cursor at any point on the curve, it will display values of each line at that point.

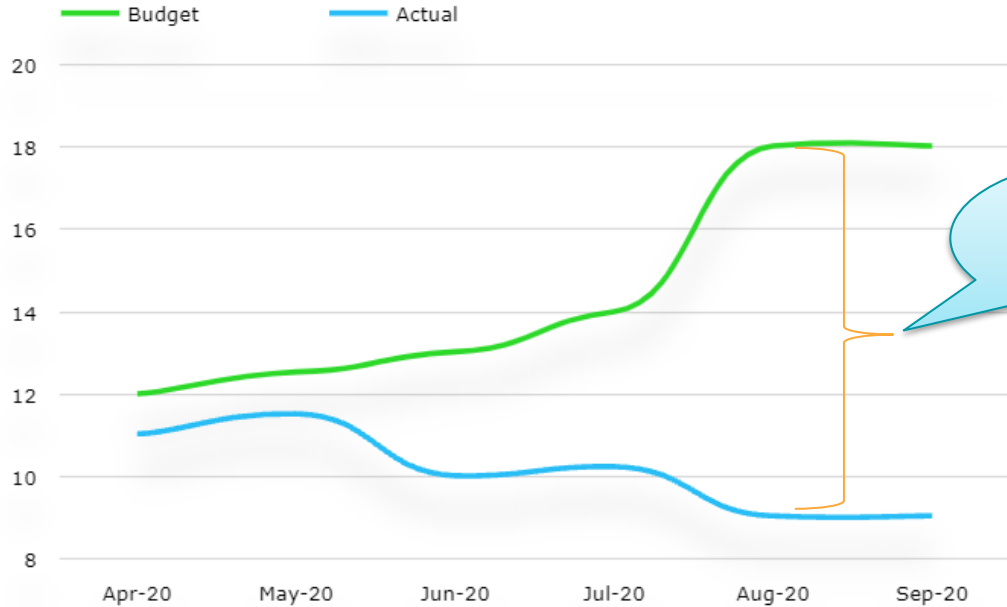
# Dashboard

Top 7 Product Dropping Sales

Product1 ▾

You can select any Product in the drop down to see its graph.

The drop down list is arranged such that the poorest performer appears in the top



gap continue to increase! Actions taken to reduce are not effective!!

# Dashboard

## Group-wise Products

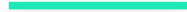
Your cursor is moved to this location to show its values

B: 43.84% (32)

A (25.0 nos - 34%)

B (32.0 nos - 43%)

C (16.0 nos - 21%)



# Reports

- ✓ Status Reports
  - Production Schedule
  - Today Production
  - Order status for any order
  - Pending orders to execute at any point of time
  - Order Summary report
  
- ✓ Analytical Report
  - Budget Vs Actual performance
    - *(Region-wise, Quarter-wise, sales Person-wise, Customer-wise )*
  - *Region-wise comparison graph*
  
- ✓ Historical Trend Reports for any period
  - Sales Trend
    - *(Region-wise, sales Person-wise, Customer-wise , Product-wise)*
    - *Comparison report on sales by Region*
    - *( Q1, Q2, Q3,Q4, whole Year)*

# Demo Site - Login Page

You can open this site , operate and see all reports both in mobile and computer and download report to your computer to see how it look like

Web address for demo site

Sales Management System

sales.viewiss.com

SALES MANAGEMENT SYSTEM

demo

\*\*\*\*

Login

Reset Password ?

Login and password entered already. Just press login to open Landing page



# Budget Vs Actual Report

Sales Mgmt

DATA ENTRY

Forms

MIS REPORTS

Daily Reports

Production Today

Production Schedule

**Budget Vs Actual**

Trend Charts

Status

MASTERS

Data Entry

Dot indicate current screen

Selection Panel

Report\*

Region-wise

FIND

RESET

Budget Vs Actual (Region-wise)

|   | Region | Budget | Order Received | Sold Qty |
|---|--------|--------|----------------|----------|
| + | East   | 28850  | 10570          | 8450     |
| + | North  | 24455  | 12620          | 8270     |
| + | South  | 24070  | 12910          | 11310    |
| + | West   | 20225  | 7400           | 7180     |

Print

Excel

PDF

You can select type of report here

You can down load the report in excel file by clicking this

You can directly print the report by clicking this

You can down load the report in pdf file by clicking this

By pressing this Plus sign, it will expand to show you Quarter-wise performance as shown in the next screen

# Budget Vs Actual Order Report

Report\*

Region-wise

FIND

RESET

### Budget Vs Actual (Region-wise)

| Region | Budget | Order Received | Sold Qty |
|--------|--------|----------------|----------|
| East   | 28850  | 10570          | 8450     |
| North  | 24455  | 12620          | 8270     |
| South  | 34070  | 12910          | 11310    |
| West   | 20225  | 7400           | 7180     |

| Quarter | Budget | Order Received | Sold Qty |
|---------|--------|----------------|----------|
| Q1      | 8020   | 7220           | 5590     |
| Q2      | 6420   | 3350           | 2860     |
| Q3      | 6855   | 0              | 0        |
| Q4      | 7555   | 0              | 0        |

This is the expanded screen when Plus sign is pressed showing quarterly split up.

The sign also changed to minus. By pressing the minus sign, the expansion can be closed

Press this x button to minus the menu as shown in the next screen

# Production and dispatch Report

The screenshot displays a web application interface for generating a production and dispatch report. On the left is a dark sidebar menu with a close button (X) at the top. The menu categories include 'DATA ENTRY' (Forms), 'MIS REPORTS' (Daily Reports, Production Today, Production Schedule), 'Trend Charts', 'Status', and 'MASTERS' (Data Entry). The main content area features a 'Selection Panel' with a 'Date\*' input field containing '01/04/2018', and 'FIND' and 'RESET' buttons. Below this is a section titled 'Production Today (01/04/2018)' which contains a table of production data. A yellow callout box points to the date field with the text 'Select any date to see the report for the day'. In the top right corner of the main area, there are icons for printer, PDF, and Excel export.

| Customer | Planned Qty | Produced Qty | Approved Qty | Despached Qty |
|----------|-------------|--------------|--------------|---------------|
| C8       | 300         | 300          | 300          | 300           |
| C10      | 480         | 480          | 450          | 450           |
| C7       | 900         | 880          | 880          | 1080          |
| C8       | 600         | 600          | 600          | 600           |
| C3       | 1100        | 1100         | 1100         | 1100          |
| C4       | 1000        | 1000         | 1000         | 1000          |
| C1       | 300         | 280          | 280          | 280           |

# Production schedule

← → ↻ 🔒 sales.viewiss.com/rpt\_productionchedule.aspx

🏠 / Dashboard / Admin / MIS Reports / Production Schedule 🔍

### Production Schedule

| Region ↕ | Customer ↕ | OrderNo ↕ | Order Date ↕ | Product ↕ | Planned Qty ↕ | Planned Date ↕ |
|----------|------------|-----------|--------------|-----------|---------------|----------------|
| South    | C4         | 5221      | 28/03/19     | P4        | 550           | 05/04/19       |
| North    | C1         | 4344      | 30/03/19     | P3        | 500           | 07/04/19       |
| North    | C2         | 5311      | 30/03/19     | P3        | 600           | 08/04/19       |
| South    | C9         | 6712      | 30/03/19     | P4        | 300           | 08/04/29       |
| South    | C3         | 32033     | 10/04/19     | P4        | 400           | 06/04/19       |
| West     | C5         | 5986      | 12/04/19     | P9        | 200           | 05/04/19       |

Moving cursor to this dark area will expand the menu.

# Order Status

Region\* Customer\* Order No\*

East C10 22121

FIND

RESET

### Order Status

|               |          |
|---------------|----------|
| Order No      | 22121    |
| Order Date    | 30/06/18 |
| Qty           | 420      |
| Ordered To    | Calcutta |
| Planned Qty   | 420      |
| Planned On    | 12/07/18 |
| Prod. Qty     | 420      |
| Prod. On      | 12/07/18 |
| App. Qty      | 420      |
| App. On       | 13/07/18 |
| Disp. Qty     | 420      |
| Disp. On      | 13/07/18 |
| Transporter   |          |
| Driver Mobile |          |

Select criteria and then press find button to show the status of the order

Comfortable to see in mobile by front end sales team on their way in travel

# Order Summary Status

27-04-2018

27-03-2020

FIND

RESET

**Search Option:** When list is very big, you can type order no. here. The list will be filtered to that order alone!

Order Summary (27-04-2018 - 27-03-2020)



Order No...

**QA approved; but not yet dispatched**

| Region | Customer | OrderNo | Order Date | Product | Planned Qty | Planned Date | Produced Qty | Produced On | Approved Qty | Approved On |
|--------|----------|---------|------------|---------|-------------|--------------|--------------|-------------|--------------|-------------|
| West   | C5       | 5986    | 12/04/19   | P9      | 400         | 02/04/19     | 400          | 03/04/19    | 400          | 03/04/19    |
| West   | C5       | 5986    | 12/04/19   | P9      | 200         | 05/04/19     |              |             |              |             |
| South  | C3       | 32033   | 10/04/19   | P4      | 400         | 06/04/19     |              |             |              |             |
| North  | C1       | 4344    | 30/03/19   | P3      | 500         | 07/04/19     |              |             |              |             |
| North  | C2       | 5311    | 30/03/19   | P3      | 600         | 08/04/19     |              |             |              |             |
| South  | C9       | 6712    | 30/03/19   | P4      | 300         | 08/04/29     |              |             |              |             |
| South  | C4       | 5221    | 28/03/19   | P4      | 550         | 05/04/19     |              |             |              |             |
| South  | C4       | 7521    | 29/07/18   | P2      | 540         | 09/08/18     | 540          | 09/08/18    | 500          | 10/08/18    |

**Planned for production. Yet to produce**

**Already despatched. But shortage by 40 because of QA rejection.**

# Sales Trend

This chart shows sales trend against budget. You can view this for any region, customer, sales rep, product

Report\*

Region-wise

Specific\*

East

FIND

RESET

Sales Trend (Region: East)



| Month | Budget | Order Qty | Sold Qty |
|-------|--------|-----------|----------|
| Apr   | 2400   | 2840      | 2030     |

Data also shown as table below the graph and can be downloaded as usual like any other table report.

# Region-wise Sales comparison

Dashboard / MIS Reports / Sales Trend

## Selection Panel

Report\*

Region Comparison

select...  
Region-wise  
Sales Rep-wise  
Customer-wise  
Product-wise

Region Comparison

Specific\*

All

FIND

RESET

You can select any region

You can select any report.



| Region | Budget | Order Received | Sold Qty |
|--------|--------|----------------|----------|
| East   | 29250  | 10950          | 8450     |



# Importance of these Reports

## ❑ The 2 most important work of sales are –

- ✓ TO CONTINUOUSLY MONITOR AND FOLLOW UP TO -
  - MEET SALES TARGET FIXED IN THE BUDGET
  - SATISFY CUSTOMERS THRO ONTIME DELIVERY

## ❑ Problem faced by sales team are –

- ❑ NEVER KNOWS THE REALITY OF PRODUCTION STATUS
- ❑ SURPRISES ON DELIVERY FAILURE ; MOSTLY KNOWN IN THE LAST MINUTES
- ❑ COMMUNICATION FAILURES AMONG THE DEPARTMENTS IN THE SUPPLY CHAIN RESULTING IN WRONG COMMITMENT TO CUSTOMERS, DELIVERY FAILURES AND ORDER MISSING
- ❑ NOT KNOWING THE PLANT AVAILABILITY TO COMMIT CUSTOMER FOR DELIVERY DATES
- ❑ THE SALES TEAM SELDOM GET TIMELY INFORMATION ON DELAYS IN MEETING PRODUCTION PLAN SO THAT SALES CAN INFORM THE CUSTOMERS ANY EXPECTED DELAY WELL IN ADVANCE.

**Our software removes all the above problem by showing live data in their Cell phone**

# Importance of these Reports

## ❑ **To top management–**

- ✓ The DASHBOARD always shows the sales performance reminding them the gap every time they open the software. Nice way to follow-up!

## ❑ **To middle management-**

- ✓ Provides detailed report to understand and act on the sales gap against the budget by showing-
  - Which are regions contributing to the gap?
  - Who are sales rep not meeting Targets?
  - Who are customers not meeting the targets?
  - Which are the products contribute to the gap?

So that they can plan counter action to cover up the gap

## ❑ **To marketing front-end management-**

- ✓ Provides detailed reports to understand and act on-
  - Production delays
  - Plant capacity constraints to commit to customer realistically
  - To push the Planning team in case of delay or change the schedule sequence to satisfy all customers
  - To follow up pending orders to execute.
  - Monitor customer orders to meet budget targets
  - To make counter Plan to remove the budget gap if any, so that targets are achieved.

# Price & Payment

## **Charges:**

1. Rs 12000/- as annual lease charges as long as you use, payable in advance.  
(or) Rs 80,000/- one time purchase payment.
2. Rs 2000/- per month service charges ( 5 users) for providing cloud server space , Hosting and maintenance if you need our cloud server. *(If 5the software is installed in your server, this charge is not applicable.)*
3. GST @18% is extra.

In case of annual lease, Customer need to renew again 10 days before renewal due date to continue to use the software.

Contact us at 9003930729 – J Shanmugam

[admin.viewiss.com](mailto:admin.viewiss.com)

[www.viewiss.com](http://www.viewiss.com)

For more information please get in touch with us,



- ❖ Mobile : 900-3930-729 (J.Shanmugam)
- ❖ Email : [issconnect@gmail.com](mailto:issconnect@gmail.com)
- ❖ [admin.viewiss.com](http://admin.viewiss.com)
- ❖ Website : [www.viewiss.com](http://www.viewiss.com)