OmegaCube ERP
Sales & CRM

Data Sheet

🛒 Sales & CRM

OmegaCube ERP's Sales Management & CRM capability helps manufacturers and distributors to stay on top of their sales and customer management from a single location.

Closely knit with all ERP modules, enterprises get a comprehensive view of sales progress from quotation till sales-fulfillment. It improves customer responsiveness and streamlines quotation workflows, sales returns, revenue & prospect management.

Customer Relationship Management (CRM)

- Maintain customer & prospect information in a centralized database.
- Automatic control over converting prospects to customers.
- Maintain customer call details, meetings, tasks, interaction notes, & appointments.
- Access customer quotes, inventory, contact listings, order details, & warranty details.
- Track sales pipeline data from Request for Quotation (RFQ) to customer delivery.
- Publish and access appointments calendar on sales personnel's smartphone.
- Schedule meetings, appointments and demos with prospects.
- Maintain data on follow-up calls, sales calls, cold calls to prospects
- Send marketing email campaigns to contact listings and track responses.
- Integration with Inventory, Shop Floor, BOM, Order Management, Invoices, Shipping & RMAs.

Estimation & Quoting

- Build accurate quotations based on BOM visibility, vendor prices, material costs, inventory, manpower & machines availability.
- Build detailed estimates to support quotes.
- Enter quotes for customers & prospects with expiration control & multiple revisions.
- Trigger supplier RFQ and use the RFQ results in estimates.
- Estimate raw material, manufacturing costs, outside services, miscellaneous, fixed & variable costs.
- Automatically create sales opportunities in CRM.
- Track quote response, follow-up, call backs, win-ratios etc.
- Attach drawings and other documents to support quotes and estimates.
- Utilize comprehensive dashboards and analytics to evaluate quoting performance.
- Convert approved quotes to sales orders at the click of a button.
- Incorporate change in customer requirement in design stage.
- Produce hard copy quotes or email directly from the system.

Sales Tax

- Setup sales tax rules and compute automatically.
- Generate sales tax reports.

Customer Portal

- Provide comprehensive self-service access to customers.
- Access customer portal through secure login. Enable configuration & access settings change.
- Provide RFQ responses, history, quotation & estimate details.
- Setup each user at a customer with different applications and their individual user id.
- Provide online ordering, past shipment history, Invoices, RMA and other functions.
- Track product shipments till it is delivered.
- Allow customer to download product manuals, quality certificates, item specifications etc.
- Customize layouts and preferences through Product Configurator.

Order Management

- Maintain customer data, shipping addresses, contacts, orders, payment info.
- Manage order types like field service, blanket releases, stock, job, repair & project orders.
- Generate Pick & Pack information based on due date, shipment location.
- Link work orders with respective sales orders.
- Block orders due to credit limits and other reasons
- Track order backlog and drill down to specific orders.
- Multiple ship-to locations per order.
- Multiple sales reps per order & commissions processing.
- Reserve adequate inventory for each order.
- Trigger job creation from sales orders.
- Specify customer specific labeling requirements.
- Maintain configured item data within sales orders.
- Provide Available-to-promise (ATP) dates based on MRP & scheduling calculations.

Electronic Data Interchange (EDI)

- Transact with trading partners for order, releases, ASN and invoices.
- Connect to on-premises or online EDI translation packages.
- Use excel based EDI processor for trading partners.
- Automatically compute net change in demand.
- Benefit from automatic integration into MRP & scheduling modules.
- Utilize exception handling workbench to evaluate supply shortages.
- Get multiple interface options i.e. Direct, Text and XML based.
- Supports hosted option.
- Supports file formats such as, ANSI X.12, EDIFACT, Odette, XML, CSV, VDA etc.
- Supports communication protocols such as, AS2, HTTPS, FTP, FTPS, SFTP & OFTP2 etc.

Point of Sale (POS)

- Perform point of sales transaction with integrated POS application.
- Process credit cards on POS terminal.
- Perform daily drawer reconciliation.
- Automatically update inventory status and post accounting transactions.
- Receive deposits on on-account orders in POS terminal.
- Monitor inventory levels and generate pick list for warehouse from POS.
- Track buying behavior through sales reports and plan production accordingly.
- Accurately capture customer information through integrated CRM function.
- Fulfil orders and ship from any warehouse, branch or store.
- Reduce freight costs, and improve customer experience through fast shipment.

OmegaCube Technologies

Shipping & Logistics

- Produce picking tickets and packing lists.
- Record serial/lot numbers for tracking.
- Generate material certifications, Bill of Lading and relevant shipping documentation.
- Automatic or manual shipping confirmation.
- Two way interface with UPS, FedEx, USPS & Starship.
- Send address, weight data & get shipping charges, actual weight & tracking numbers.
- Configurable pick-list processing with fulfillment processes to fit your needs.
- Schedule drivers and decide shipping routes.
- Implement One-click invoicing process & print customer-specific labels.
- Send tracking information to customers.

RMA & Customer Returns

- Provide RMA and return documentation to
- customers.
- Receive goods and trigger quality process.
- Generate credit memos with 1-click.
- Update Inventory automatically based on a sales return.
- Link return to original shipment.
- Assign RMA numbers and track progress.
- Track return reason by line item.
- Apply correct pricing to returns.

Pricing

- Automatic pricing by line items according to pricing rules with ability to edit.
- Recalculate prices of groups of related products if a predefined threshold is met.
- Setup multiple pricing structures, promotions and discount structures.

Invoicing

- Generate sales invoice automatically or by user request.
- Define invoicing rules according to customer preference – one per order, or shipment.
- Issue and track prepayments.
- Multiple payment terms.
- Track credit card payments.

Reporting & Analysis

- Standard reports and user-customizable reports.
- Integrated business intelligence reports.
- Utilize comprehensive dashboards and analytics to evaluate quoting performance.
- Drill down to transactional details of a particular sale.

Since 1999, OmegaCube has consistently believed in building and delivering powerful products with a single philosophy,

No two companies operate exactly the same, and they need flexibility in their systems in order to sustain their competitive edge, always.

Begin your first step towards business growth through automation!
Get in Touch with us today.

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