



Case Study

CRM / Sales Process and
Inventory Management
Solution

Features

- Sales capture form that simplifies the process of recording a sale
- Document upload form that allows document upload from the disk as well as image and video capture through camera, if used on a mobile device
- Lead capture form that is linked to sales
- Activities module to handle workflow based task allocation
- Inventory module with check in and check out integrated with the sales
- Fully responsive design allowing the application to be compatible with mobile devices
- The ability to capture signatures on screen thereby eliminating the need for paper based forms
- Integrated export to PDF and Email functionality

Customer Details Panel

CUSTOMER INFORMATION

Name: *		Order No.: *	
Business Name:		ABN:	
Unit:		House Number: *	
Street Name: *		Street Type: *	Alley
Suburb: *			
State: *	New South Wales	Post Code: *	
Supply Address Is Same As Installation Address: *	☒ Yes ☐ No		
Primary Contact No.: *		Mobile No.:	

Property Details Panel

PROPERTY DETAILS

HouseType: *

Single Storey ▼

Roof Type: *

Tile
Tin
Flat
Clip Lock

Roof Angle: *

0°-5° ▼

Roof Direction: *

N
NE
NW
W
E

Split Array/Dual Tracker: *

No ▼

Existing System: *

No ▼

KW (If Existing System):

Electricity Supply Details Panel

METER & ELECTRICITY SUPPLY DETAILS

Meter Number: *

Meter Type: *

Peak

Off Peak 1

Off Peak 2

TOU

Gross

Net

Power Phase: *

Single

▼

Supply Type: *

Over Head

▼

Height Of Meter Box: *

Less Than 2 Meters

▼

Meter Distance From Electric Pole (meters):

Pole/Service Point No:

Electricity Retailer:

NMI Number:

Extra Charges:

Solar System Panel

SOLAR SYSTEM DETAILS

Panel Brand: *	AEF	Panel Size (Watt): *	
No. Of Panels: *		Inverter Brand: *	SMA
Inverter Size (KW): *		Inverter Phase: *	Single
System Size(KWH): *			
Inverter Tracker: *			
Tilt: *	No		
Tilt Notes:			
Standard Meter Installation: *	Yes		

System Cost Panel

SYSTEM COST

Total System Actual Cost (\$): *

STC Rebate/Solar CR# (\$): *

Cost aft. STC Credit/Rebate (\$): *

Extended Warranty Cost (\$):

Non Standard Meter Installation Cost (\$):

Other Variations:

Total Amount Payable (\$): *

Deposit Amount Cost: *

Deposit Amount: *

Cash

Deposit Amount Cost

Signature Panel

SIGNATURE

—

I have read the terms and conditions and agree with them: ☐

Sales Person Name:

Customer's Name:

Sales Person Signature:

Customer's Signature:

Clear Signature

Clear Signature

Date.:

Date:

Inventory Module

 **SKU** SALES ACTIVITIES REPORTS INVENTORY ALL

CREATE ▾







 Create SKU

View SKU

Recently Viewed

 Kevin Peterson

 Andrew Flintoff

 suiteadmin A...

<

SKU

Serial No. ▾

Product Code ▾

Product Name ▾

Quantity ▾

Product ▾

Product Description ▾

Product Category ▾

Location ▾

 ▾

BULK ACTION ▾





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☐		SR06	PRO06	Racking	42	<u>Clip Lock Big</u>	<u>Racking</u>	<u>Melbourne Inverters & Panels</u>
								<u>Melbourne</u>

Appointments Module

 **APPOINTMENTS** SALES ACTIVITIES REPORTS INVENTORY APPOINTMENTS ALL

CREATE   

DETAILS

Appointment Date & Time:



Are you the owner and decision maker for the property/business?: Yes

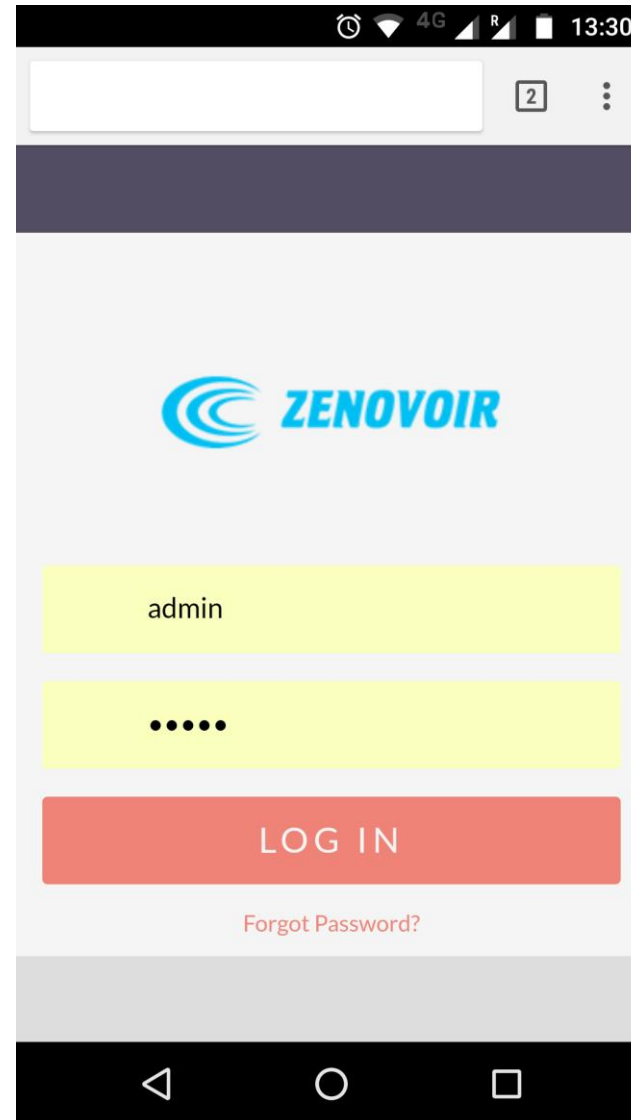
Is it a free standing building?
Meaning you have your own roof and not sharing with your neighbor?: FREESTANDING

Quarterly Bill (\$):

Do you have any solar system installed: No

Meter Phase: One

Mobile
Compatible



Mobile Screen (Responsive Design)

A mobile application interface for managing electricity accounts. The top status bar shows standard Android icons and the time 13:44. Below is a dark purple header with a hamburger menu icon and the text 'ACCOUNTS' with a downward arrow. A light blue bar contains the text 'CREATE' with a downward arrow, followed by icons for search, notifications, and a user profile. The main content area has a dark grey title bar 'METER & ELECTRICITY SUPPLY DETAILS' with a minus icon. The form contains five fields, each with a red asterisk indicating a required field: 'Meter Number' (a light green text input field), 'Meter Type' (a dropdown menu showing '0 selected'), 'Power Phase' (a dropdown menu showing 'Single'), 'Supply Type' (a dropdown menu showing 'Over Head'), and 'Height Of Meter Box' (partially visible at the bottom). The bottom of the screen features a black Android navigation bar with back, home, and recent apps icons.

13:44

ACCOUNTS ▼

CREATE ▼ 🔍 🔔 👤

METER & ELECTRICITY SUPPLY DETAILS —

Meter Number: *

Meter Type: *

Power Phase: *

Supply Type: *

Height Of Meter Box: *

0 selected

Single

Over Head