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Gold Enterprise Resource Planning
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Gold Cloud Business Applications

'08, '09, '10 & 2011
PRESIDENT'S CLUB
for Microsoft Dynamics

2010 INNERCIRCLE
for Microsoft Dynamics

- 2019

- 2012

Microsoft
Partner Of the
Year Winner

Sales Automation for Pharma



Pharma And Veterinary
Segment: ISP,
Cloud solution provider

Business Context

- Sales process integrated with mobile apps for sales team planned activities execution and real time updates, detailed planner designed to capture and plan their monthly calls areas and territory wise.



Microsoft Solutions Used

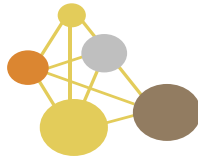
Azure



Business Applications



PowerApps



AI and ML



Microsoft 365



Scope of Work

- Sales Management
 1. Leads
 2. Quotes
 3. Orders
- Sales Planner
 1. Monthly Calls Planner
 2. Weekly Call Planner
 3. Daily Sales Call
- Customer Services
 1. Ticket Automation Process



End User Experience

The screenshot displays a CRM application interface for managing a 'Monthly Planner Master'. The top navigation bar includes a back arrow, a list icon, and several action buttons: 'Save', 'Save & Close', 'New', 'Send For Approval', 'Approve', 'Reject', 'Delete', 'Create Weekly Planner' (highlighted with a red box), and 'Refresh'. The main header shows the record ID 'MVP-10087', the title 'Monthly Planner Master', the creation date '4/25/2022 4:52 PM', and the owner 'CRM Admin'. Below the header, there are tabs for 'General', 'Monthly Visit Details', 'Weekly Master', and 'Related', with 'General' selected. The 'Planner Details' section contains fields for 'Planner ID' (MVP-10087), 'Sales Person' (CRM Admin), 'Start Date*' (5/1/2022), 'End Date*' (5/31/2022), and 'Position' (POS-89000). The 'Approval Related Details' section includes 'Requested Date', 'Due Date For Approval', 'Approval Required From' (Bilal Ghazi), 'Planner Status' (Draft), 'Approval Comments', and 'Manager Comments'. A left sidebar provides navigation for 'Marketing' (Marketing Lists, Quick Campaigns) and 'Sales Planning' (Visit Plan Roaster, Monthly Planner, Weekly Visit Plann..., Appointments) modules, along with 'Tools' (Reports).



Standalone/Seeded

Maison Sales Automation for Pharma can be deployed standalone on-premises or on Cloud.

