

# **NYGGS SFA**

Sales process made easy

# Features – Sales Force Automation

## 01. Employee Reporting

We can manage our field staff visibility mobile application in SFA .

- We can map employee to manager and track their live location.
- We can check live visit and communication of sales person.

## 02. Appointment Management

Meeting with any customers can be scheduled or updated live.

- You can schedule meeting with existing customers.
- Upcoming meeting alerts will given to employees.
- Route optimization is available for sales person for the better time management

## 03. Customer Database

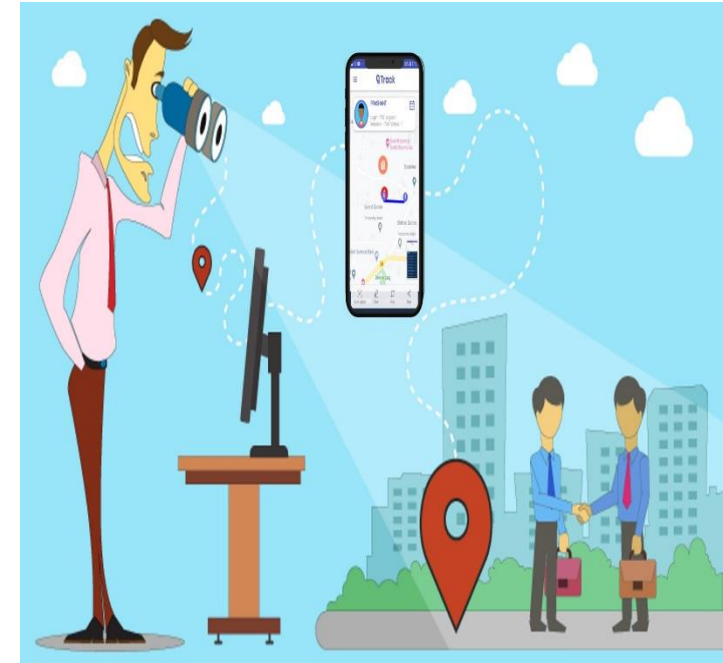
Customer can be created and maintain their database in the system

- Customer information can be entered and save all details
- Meetings related to customers can be viewed and analyse all the activities

## 04. Order & Expense Management

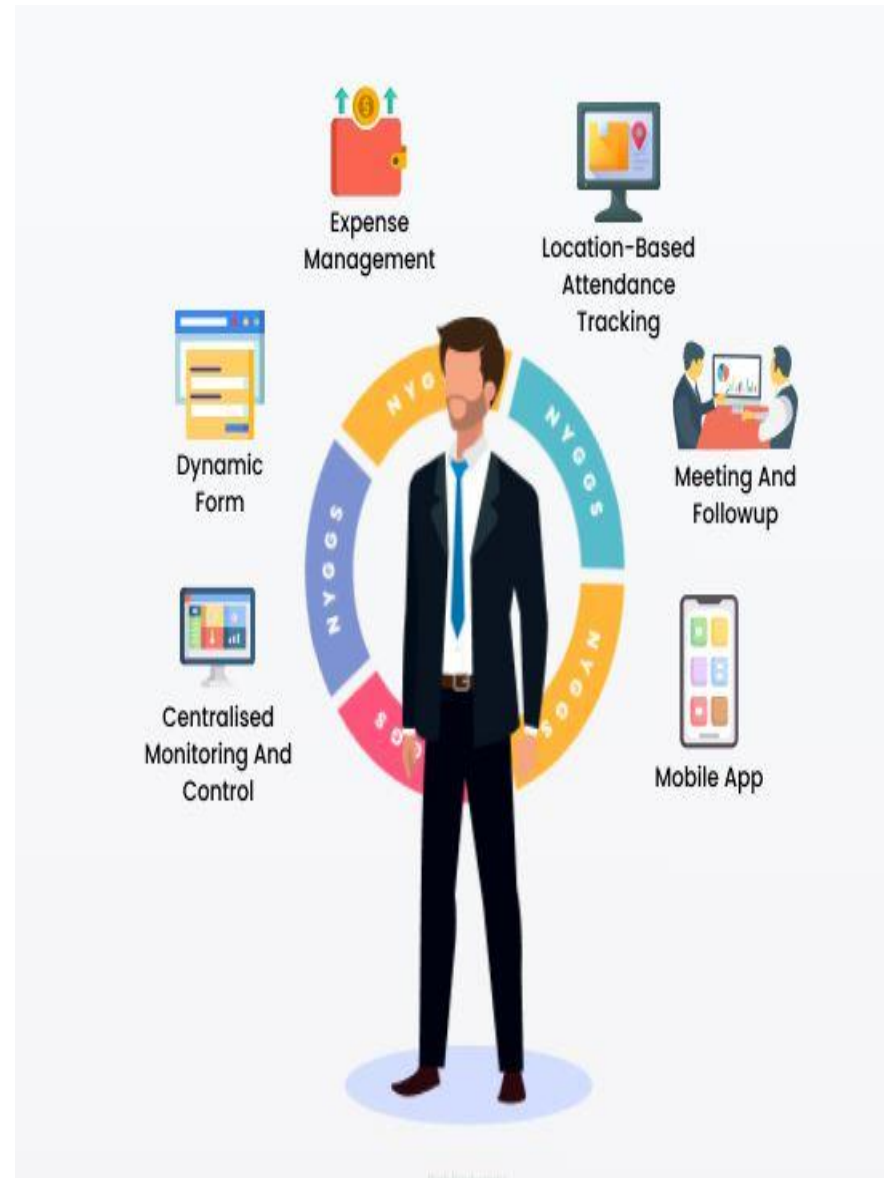
All orders will be captured in SFA and expense on the basis of travelled kilometer will be captured.

- Employee can place order with mobile application by checking stock.
- Order bill and collection will be updated with mobile application.
- Expense will be automatically calculated on the basis of distance travelled by employee.



# Key Features

- Live Tracking just by mobile app
- Attendance Records
- Employee count on Visit
- Number of meeting in day
- New Leads generated In a Day
- List of meeting along with points of Discussion
- Schedule next follow up meeting
- Reschedule/ Cancel Meeting
- Assign meeting to team member
- Online bill to customer
- Payment update on mobile application



- Route Optimization
- Route Suggestion
- Upload and manage expense
- TA calculation on basis of milage
- Expense management
- scheduled meeting
- Customer management
- Stage wise customer reports
- Dynamic Data Capture
- Stock Management
- Order Management
- Dashboard and Report
- Email & Notification Geo-fence customer

**NYGGS SFA - 2x Your Field Sales Workforce Productivity**



# Employee Monitoring

**Summary Statistics:**

- Total Emp: 39
- Active: 6
- Inactive: 33
- Total Meetings: 4
- New Client: 3
- Existing Client: 1
- Total Completed OD: 0
- Scheduled Meeting: Total 2, Completed 0, Scheduled 2

**Active Employees List:**

- Ranjan Kumar Singh (41020337)
- Raj Kumar Saha (41020361)
- Santosh Kumar Mohapatra (41020347)
- Chandan Kr Poddar (41020359)
- Shubasis Mitra (41020358)
- Abhay Kumar

**Map Legend:**

- Form Submitted (Green)
- No OD Started (Red)
- OD Started but no Form Submitted (Yellow)
- OD Completed With Form Submitted (Light Blue)
- OD Completed But No Form Submitted (Dark Blue)










- Live location of the employee
- Active and inactive employees

- Meetings completed in a day
- Upcoming meeting alerts

← Clients Dashboard Clients

Client List

From 21-04-2023 To 22-04-2023 All

Sn.	Created Date	Name Of Party	Client Status	Contact Person	Mobile No	Email	Client Owner	Last Meeting Date	Last meeting by	Total Meetings
1	 22/04/2023 01:04 PM	Avijit Das	NA	Avijit Das	8927397470	NA	Shubasis Mitra(41020358)	NA	NA(NA)	0
2	 22/04/2023 12:46 PM	Lakshmi Enterprise	NA	Aajit Ji	9934498631	NA	Abhay Kumar Singh(41020342)	22/04/2023 12:48 PM	Abhay Kumar Singh(41020342)	1
3	 22/04/2023 12:36 PM	Aanpuna Enterprise	NA	S K	9931405451	NA	Abhay Kumar Singh(41020342)	22/04/2023 12:40 PM	Abhay Kumar Singh(41020342)	1
4	 22/04/2023 12:06 PM	Shiv Bhandar	NA	Saurav Kumar	7903276073	NA	Chandan Kr Poddar(41020359)	22/04/2023 12:10 PM	Chandan Kr Poddar(41020359)	1
5	 21/04/2023 11:35 AM	Rajiv Ji	NA	Rajiv Ji	9334446848	NA	Ranjan Kumar Singh(41020337)	21/04/2023 01:51 PM	Ranjan Kumar Singh(41020337)	1
6	 21/04/2023 12:44 PM	Santosh Saha	NA	Santosh Saha	8927397470	NA	Shubasis Mitra(41020358)	21/04/2023 12:50 PM	Shubasis Mitra(41020358)	1
7	 21/04/2023 11:35 AM	Rajive Terdas	NA	Raju Ji	9334446848	NA	Sanjit Kumar Singh(41020341)	21/04/2023 11:37 AM	Sanjit Kumar Singh(41020341)	1
8	 21/04/2023 11:02 AM	Raju Enterprise	NA	R K	9334446848	NA	Abhay Kumar Singh(41020342)	21/04/2023 11:05 AM	Abhay Kumar Singh(41020342)	1
9	 21/04/2023 10:24 AM	Santosh Enterprise	NA	Santosh Kumar	9801516283	NA	Abhay Kumar Singh(41020342)	21/04/2023 10:39 AM	Abhay Kumar Singh(41020342)	1

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- Customer can be added in the system
- Customer can be geo-fenced

- Customer wise meeting can be tracked
- Customer wise discussion will be captured



Stocks



Orders



Clients

## ← Add Product

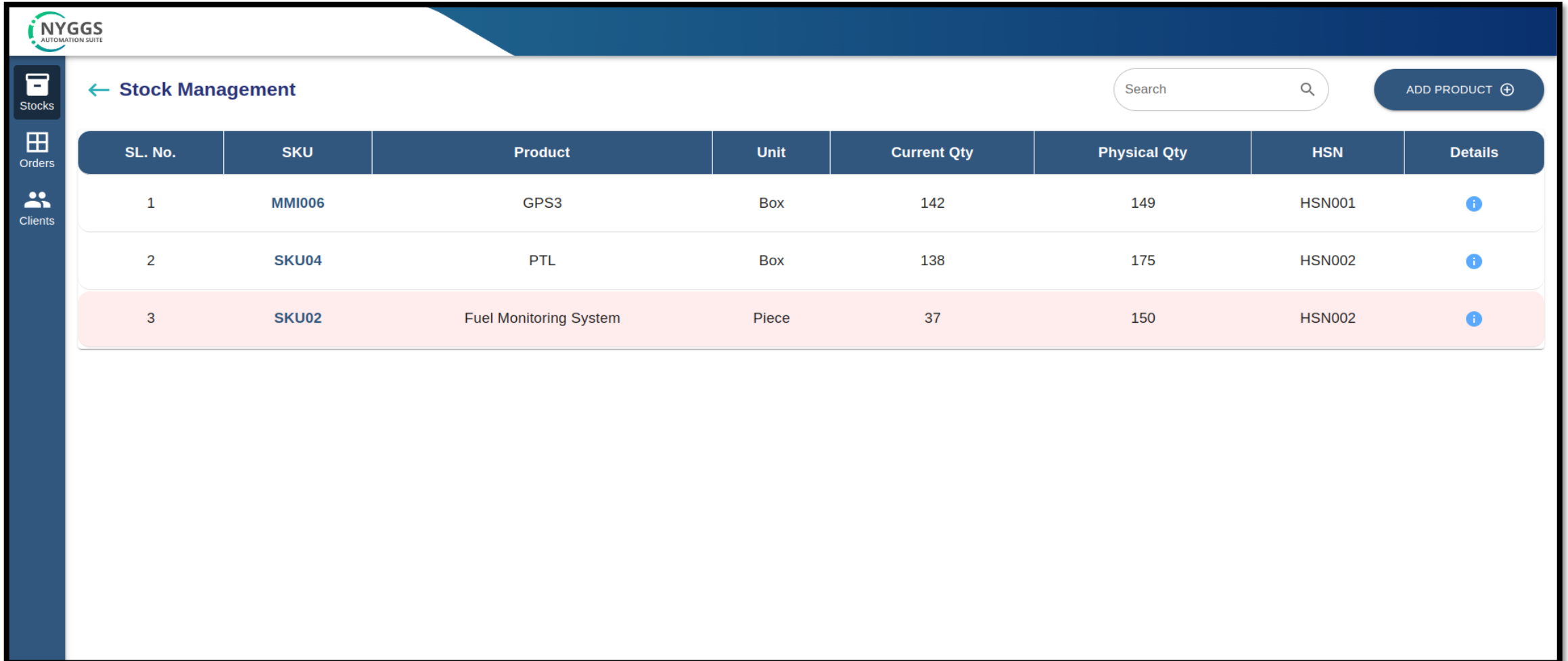
Stock Management > Add Product

SKU *	Product Name *	Unit *	Opening Qty *	HSN *
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Min Reorder Qty *	Allow Order Till Qty	Block Stock on Order Created <input checked="" type="radio"/> Yes <input type="radio"/> No		<input type="button" value="UPLOAD IMAGE"/>
<input type="text"/>	<input type="text"/>			
Min Selling Price	Standard Selling Price *			
<input type="text"/>	<input type="text"/>			

Cancel

Save

- Add product
- Product Mapping with Customers
- Minimum Selling Price
- Threshold Quantity of a Product



The screenshot shows the 'Stock Management' page in the NYGGS Automation Suite. The page features a dark blue header with the NYGGS logo and a navigation sidebar on the left with icons for 'Stocks', 'Orders', and 'Clients'. The main content area has a title '← Stock Management', a search bar, and an 'ADD PRODUCT' button. Below this is a table with 8 columns: SL. No., SKU, Product, Unit, Current Qty, Physical Qty, HSN, and Details. Three rows of product data are listed, with the third row highlighted in light pink.

SL. No.	SKU	Product	Unit	Current Qty	Physical Qty	HSN	Details
1	MMI006	GPS3	Box	142	149	HSN001	<a href="#">i</a>
2	SKU04	PTL	Box	138	175	HSN002	<a href="#">i</a>
3	SKU02	Fuel Monitoring System	Piece	37	150	HSN002	<a href="#">i</a>

- Manage Product
- Product addition configured form

- HSN Management
- Quantity update

# Inventory Management



## Product Detail

Stock Management > Product Detail

Update Product

SKU: MMI006

Product Name: GPS3

Unit: Box

Current Quantity: 140

HSN: HSN001



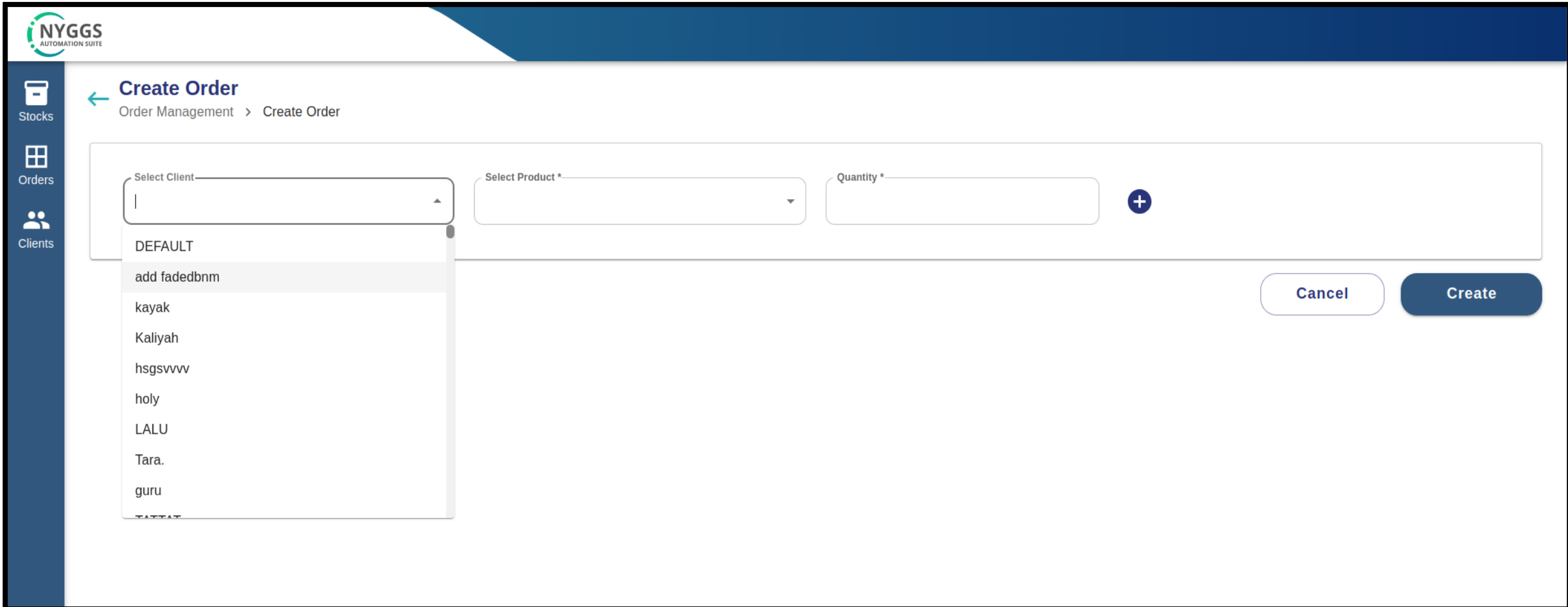
Update Stock

SL. No.	Date	Procured Quantity	Disbursed Quantity	Remarks	Created By
1	06/06/2023		-2	Ordered	REDMI
2	05/06/2023		-1	Ordered	Biswa
3	29/05/2023		-7	Ordered	Biswa
4	26/05/2023	+150			

Rows per page: 10 1-4 of 4 < >

- Manage your Stock
- Update Stock on a go
- Customer Wise Stock update
- Stock live progress





NYGGS  
AUTOMATION SUITE

Stocks

Orders

Clients

## Create Order

Order Management > Create Order

Select Client

Select Product \*

Quantity \*

+

Cancel

Create

DEFAULT

add fadedbnm

kayak

Kaliyah

hsgsvvvv

holy

LALU

Tara.

guru

TATAT

- Select your customer
- Select Products already Mapped
- Product Inventory Management
- Live Quantity update




## ← Order Management

CREATE ORDER +

SL. No.	Order Id	Client Name	Items	Order Date	Delivery Date	Amount	Created By	Status	Action
1	ORD-06-2023-5506-1	add fadedbnm	1	06/06/2023	12/06/2023	1624	REDMI	Created	<a href="#">View</a>

- Order List
- Order Priority Management

- Order Validation
- Order Id for tracking



Customer Details  
Customer Management > Customer Details

Customer Name: DEFAULT      Email:      Address:

Customer Wise Product Price : + ADD

SL No.	Product Name	Price	Action
1	PTL	1000	

### Email Configuration

Created  ON

Approved  OFF

Packed  OFF

Dispatched  OFF

Delivered  OFF

Rejected  OFF

Cancelled  OFF

- Create your order
- Order Status Management

- Alert and Notification
- Live Tracking

## View Order

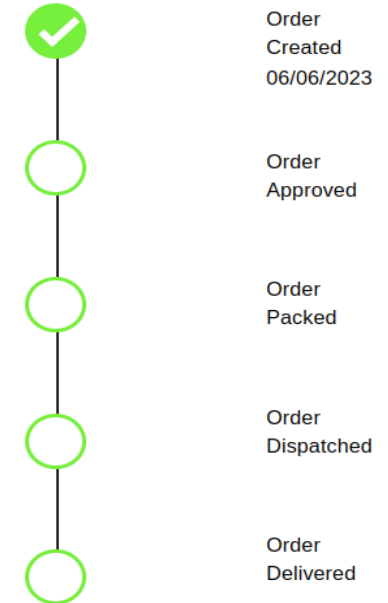
Order Management > View Order

Update Status

**Order ID:** ORD-06-2023-5506-1      **Order Date:** 06/06/2023      **Client Name:** add fadedbnm  
**Client Address:** 869, Phase V, Udyog Vihar, Sector 19, Gurugram, Haryana 122008, India 122008      **Order Status:** Created

### Product Details :

SL No.	Product Name	Qty	Unit Price	Total	GST	Total (Including Taxes)
1	GPS3	x 2	700	1400	224	1624
				<b>Total Price</b>		<b>1624</b>
				Amount (Without GST)		1400
				IGST		224
				CGST		0
				SGST		0
						<b>1624</b>



- Customer Invoice Management
- Online Invoice Link

- Order live tracking
- Mobile application to update order status

# Meeting Management





Meetings Dashboard


Meeting List

Meeting Report | EMP Wise Report | From: 22-04-2023 | To: 22-04-2023 | All | status | Go

**Abhay Kumar Singh (41020342)** | From: 22-04-202 | To: 22-04-202 | Total Meetings: 3 | New Clients: 2 | Unique Clients: 3 | Working Days: 1 | Expense: 0

Date	Meeting Start Time	Meeting End Time	Meeting Start Location	Meeting End Location	Meeting Duration	OD Date/Time
 22/04/2023 12:48 PM	12:46 PM	12:48 PM	mor, 9M3X+3P4, Mohammadpur, Bihar 841437, India	9M3X+9GR, Kushahar, Bihar 841423, India	0 hours 1 minutes	Start:09:26: AM End: 09:26: AM
 22/04/2023 12:40 PM	12:36 PM	12:40 PM	5M7G+MV5, Malmaliya, Bihar 841406, India	mor, 9M3X+3P4, Mohammadpur, Bihar 841437, India	0 hours 4 minutes	Start:09:26: AM End: 09:26: AM
22/04/2023 10:14 AM	10:13 AM	10:14 AM	4QG9+MWW, Dumduma, Bihar 841417, India	5M7G+MV5, Malmaliya, Bihar 841406, India	0 hours 0 minutes	Start:09:26: AM End: 09:26: AM

**Chandan Kr Poddar (41020359)** | From: 22-04-202 | To: 22-04-202 | Total Meetings: 1 | New Clients: 1 | Unique Clients: 1 | Working Days: 1 | Expense: 0

Date	Meeting Start Time	Meeting End Time	Meeting Start Location	Meeting End Location	Meeting Duration	OD Date/Time
 22/04/2023 12:10 PM	12:06 PM	12:10 PM	6XFJ+Q4M, Mirjanhat, Habibpur, Bihar 812002, India	Patal Babu Rd, Sakhichand Katra, Shah Market, Bhagalpur, Bihar 812002, India	0 hours 4 minutes	Start:09:54: AM End: 09:54: AM

- Meeting can be marked by mobile application
- Employee wise meeting monitored
- Meetings in term of new and existing customers
- Meeting expense and communication



# Schedule Meeting and Reminders



← **Scheduled List** Dashboard Scheduled List

Total 2 Total Completed 0 Total Scheduled 2 Total Rescheduled 0 Missed 0

From 20-04-2023 To 22-04-2023 User Status Go

Sn.	Client Name	Scheduled Date	ReScheduled Date	Scheduled By	Re-Assigned By	Re-Assigned To	Last Assigned To	Last Meeting Date	Client Owner	Branch	Remark	Meeting Completion Status	Status
1	Suman Enterprise	22/04/2023 Start:10:13 AM End: 02:14 PM	NA	Abhay Kumar Singh (41020342)	NA	Abhay Kumar Singh (41020342)	NA	22/04/2023 10:14 AM	Abhay Kumar Singh (41020342)	5M7G+3W8, Malmaliya, Bihar 841406, India	Party vist ke liye Party Next 15 day		SCHEDULED
2	Shiv Kirana	22/04/2023 Start:02:35 AM End: 03:35 PM	NA	Abhay Kumar Singh (41020342)	NA	Abhay Kumar Singh (41020342)	NA	13/04/2023 02:35 PM	Abhay Kumar Singh (41020342)	3RX5+CH9, Station Rd, Masrakh, Bihar 841417, India	Party counter Retelling visit ke liye		SCHEDULED

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- Meeting can scheduled by mobile application
- Route plan can be done by employee

- Alerts & Notification for upcoming meetings
- Meeting missed and reschedule

Expense List

Dashboard Expense List

TotalEmp 3
Approved 0
Rejected 0
Pending 23

From

To

Expense Type

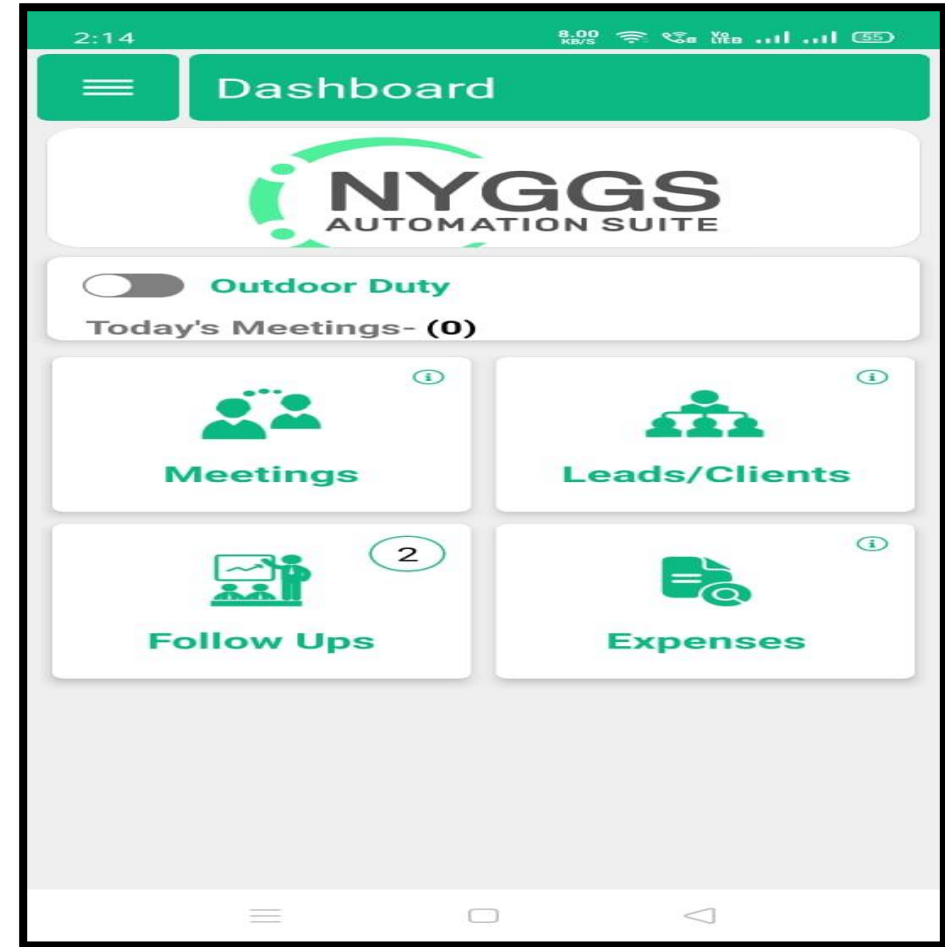
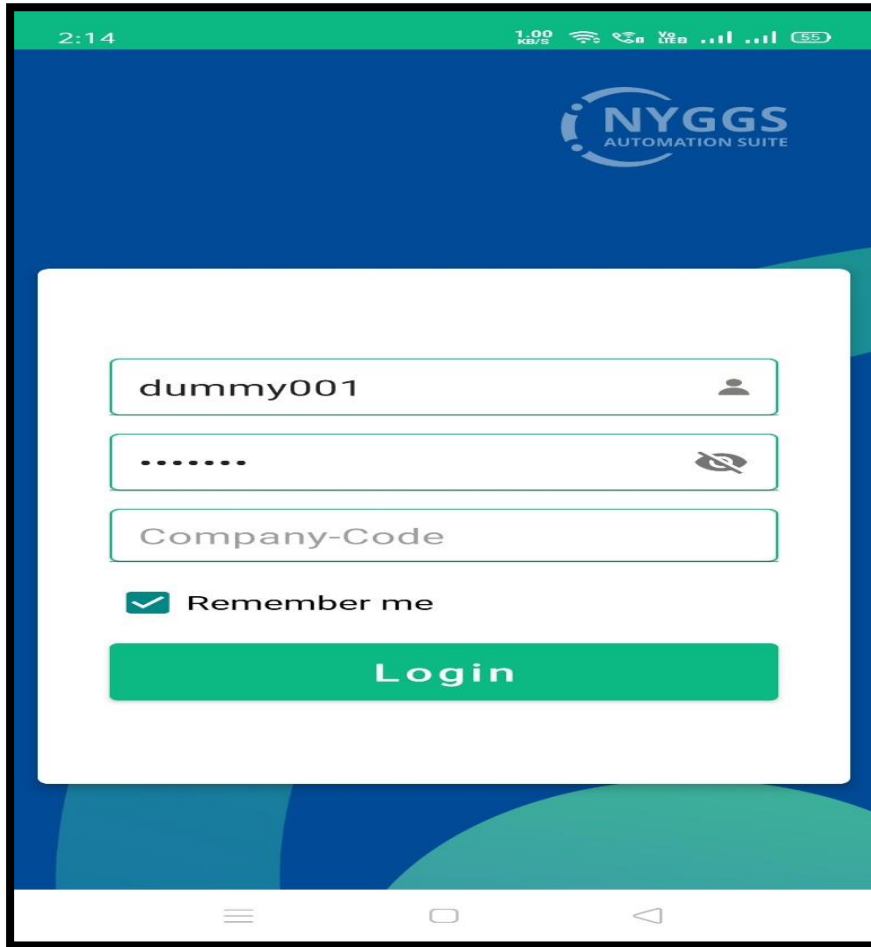
All

<input type="checkbox"/>	S.No	Create Date	Expense Date	Emp. Name	Party Details	Type	Amount(Rs)		Descriptions
<input type="checkbox"/>	1	21-04-2023	21-04-2023	Ratan Kumar Biswas(41020354)	NA	Daily Distance Fare	40.79	<span style="background-color: #ccc; border-radius: 50%; padding: 2px;">i</span>	NA
<input type="checkbox"/>	M 2	21-04-2023	21-04-2023	Ratan Kumar Biswas(41020354)	Rabi Da	Meeting Distance Fare	33.66	<span style="background-color: #ccc; border-radius: 50%; padding: 2px;">i</span>	NA
<input type="checkbox"/>	M 3	21-04-2023	21-04-2023	Ranjan Kumar Singh(41020337)	Rajiv Ji	Meeting Distance Fare	29.51	<span style="background-color: #ccc; border-radius: 50%; padding: 2px;">i</span>	NA
<input type="checkbox"/>	M 4	21-04-2023	21-04-2023	Ratan Kumar Biswas(41020354)	Sapan Roy	Meeting Distance Fare	68.34	<span style="background-color: #ccc; border-radius: 50%; padding: 2px;">i</span>	NA
<input type="checkbox"/>	5	20-04-2023	20-04-2023	Ratan Kumar Biswas(41020354)	NA	Daily Distance Fare	19.77	<span style="background-color: #ccc; border-radius: 50%; padding: 2px;">i</span>	NA
<input type="checkbox"/>	6	20-04-2023	20-04-2023	Ranjan Kumar Singh(41020337)	NA	Daily Distance Fare	0.01	<span style="background-color: #ccc; border-radius: 50%; padding: 2px;">i</span>	NA
<input type="checkbox"/>	M 7	20-04-2023	20-04-2023	Ranjan Kumar Singh(41020337)	Raju Kirana Stor	Meeting Distance Fare	0.00	<span style="background-color: #ccc; border-radius: 50%; padding: 2px;">i</span>	NA

● Approved
● Rejected
● Amount Deviation

- Expense report customer wise
- Approval workflow for expense
- Expense submission from mobile application
- Distance travelled with predefined milage

# Employee Mobile App



- Employees can start Visit from mobile application
- Employee can mark visit from mobile application

2:14 0.33 KB/s

## Scheduled Meetings

**Aa** SCHEDULED

**Created By** mahi bhai (mahi007)  
**Assigned To** amisha(654648) Reassign  
**Last Assigned** mahi bhai(mahi007)  
**ReAssigned By** MADDY(maddy001)  
**Scheduled Date** 22/04/2023  
**Scheduled Time** 11:14 AM -> 01:00 PM  
**Branch Address** 29, Sector D, Vasant Kunj, New Delhi, Delhi 110070, India  
**Remark** na

Cancel ReSchedule

**Sanni shop** SCHEDULED

**Created By** Rajesh DEV (RJD001)  
**Assigned To** Rajesh DEV(RJD001) Reassign  
**Scheduled Date** 22/04/2023  
**Branch** 873, Phase V, Udyog Vihar,



9:41

## Create Order

**Select Client Name** Ratan Logistics  
**Select Product** GPS  
**Quantity** 05

Add

Product Name	Quantity	Total Amt.	Action
GPS	5	2000	<span>🗑️</span>
GPS	5	2000	<span>🗑️</span>

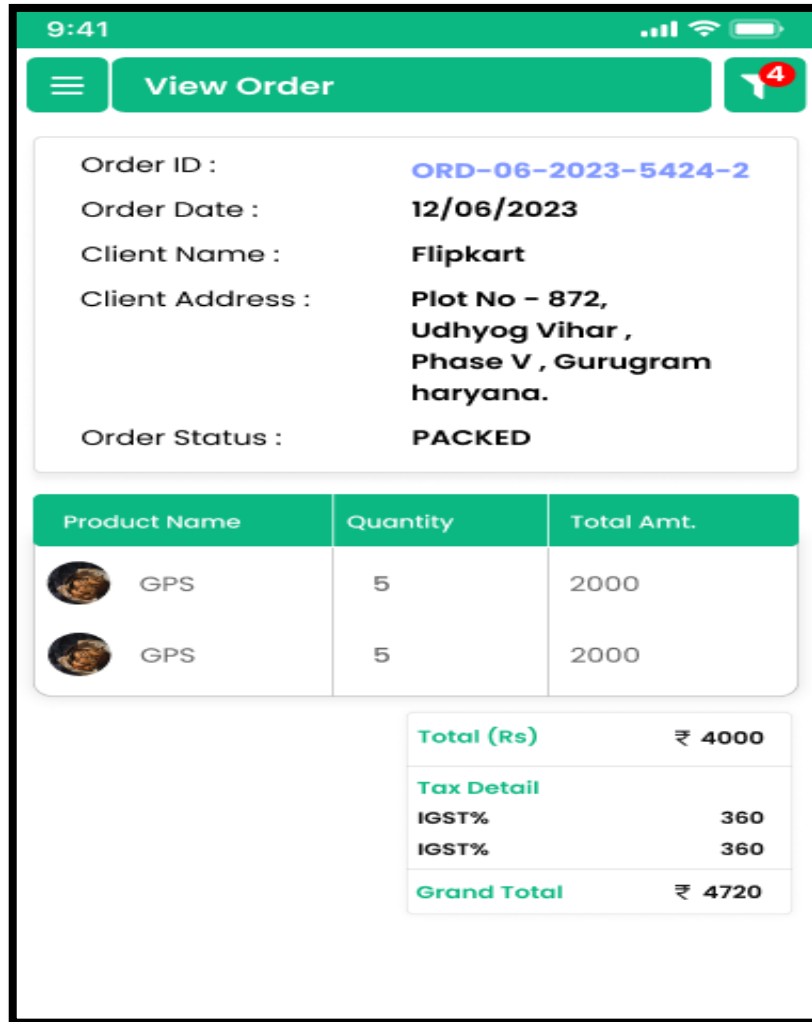
**Total (Rs)** ₹ 4000

**Tax Detail**

IGST%	360
IGST%	360
<b>Grand Total</b>	<b>₹ 4720</b>

- Employees can start Visit from mobile application
- Employee can create orders from mobile application.

# Employee Mobile App



9:41

View Order 4



Order ID : **ORD-06-2023-5424-2**

Order Date : **12/06/2023**

Client Name : **Flipkart**

Client Address : **Plot No - 872,  
Udhog Vihar ,  
Phase V , Gurugram  
haryana.**

Order Status : **PACKED**

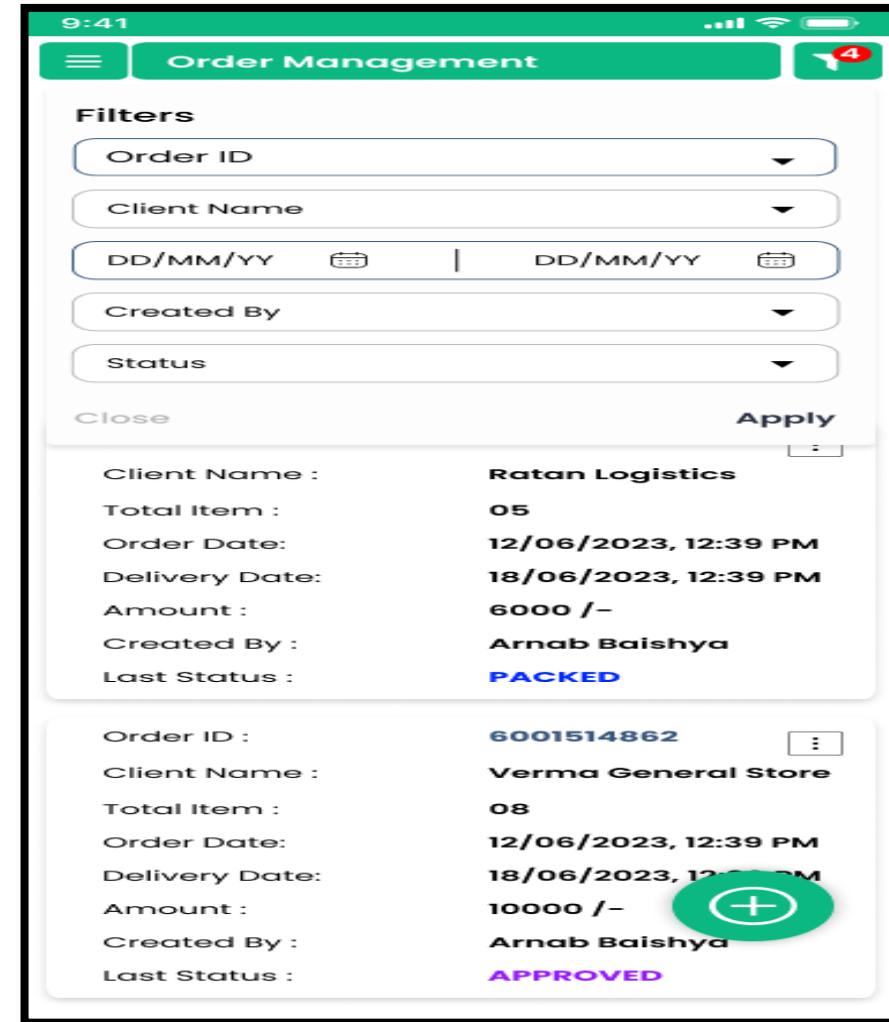
Product Name	Quantity	Total Amt.
 GPS	5	2000
 GPS	5	2000

**Total (Rs)** ₹ 4000

**Tax Detail**

IGST%	360
IGST%	360

**Grand Total** ₹ 4720



9:41

Order Management 4

**Filters**

Order ID

Client Name

DD/MM/YY | DD/MM/YY

Created By

Status

Close Apply

Client Name : **Ratan Logistics**

Total Item : **05**

Order Date: **12/06/2023, 12:39 PM**

Delivery Date: **18/06/2023, 12:39 PM**

Amount : **6000 /-**

Created By : **Arnab Baishya**

Last Status : **PACKED**

Order ID : **6001514862**

Client Name : **Verma General Store**

Total Item : **08**

Order Date: **12/06/2023, 12:39 PM**

Delivery Date: **18/06/2023, 12:39 PM**

Amount : **10000 /-**

Created By : **Arnab Baishya**

Last Status : **APPROVED**

- Employees can create order invoice from mobile application.
- Employee can check order details from mobile application



***Thank You!***

***Contact Us:***

***Mobile Number - +91 7303595777***

***Email Id – Sales@nyggs.com***