

# CASE STUDY

## Leading steel giant Adopts Sugar CRM to Launch Web App



### ABSTRACT

A premier Indian iron and steel reinforcement enterprise wanted a CRM that was modern, quick and well designed. The company wanted a solution which not only helped them to manage leads, but also track permissions, manage product catalogues and integrate all these facilities with its ERP. Indus Net Technologies understood the time-bound nature of their requirements and used open source Sugar CRM to build a responsive web app that integrated the client's CRM with its ERP and ecommerce website.

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## RESPONSIVE WEB APP BRINGS LEAD MANAGEMENT SOLUTIONS TO STEEL GIANT

It might seem a little odd to discuss iron & steel and web CRM in the same breath. Yet, even the most unlikely industry needs web based technologies to remain relevant in an increasingly digital economy. The client wanted a CRM with which it could manage leads, products, invoices and orders, product catalogues and also find a way to manage escalations, permissions and reports. The company also wanted Indus Net Technologies to integrate their CRM with their ERP.

Indus Net Technologies adopted a two pronged approach to create a lead management system: manual and API-generated. The manual module helped the client to help its back office take control of lead management in a better fashion. Its back office can now efficiently track leads, create leads and talk to customers and prioritize them. The API-generated lead management solution could be integrated with websites and other sources from where leads arrive. This helped the client to track the source of the lead and target future lead generation campaigns based on that information. Another important feature that Indus Net Technologies integrated was to escalate leads. If there were deadlines and a particular lead hadn't been updated, the custom CRM has an option to escalate that particular lead.



What's a CRM if one can't grant or take permissions from employees, as and when required? Our custom CRM allows client admins to create users, roles and teams. For example, a junior admin can add leads, delete leads and update lead-related information. However, he or she may not be able to do anything more than that. A robust payment system helps customers to place orders and pay for them securely. If any lead is interested in a product that is sold by the client, all they need to do is to generate an order to request for a quote. A quote is sent via email, and if the customer wishes, an invoice is generated. Once the payment goes through, it is updated in the CRM so that it is marked as a completed sale.

Indus Net Technologies had very little time to finish the project. Usually, a task like this could take around 4 months but the developers at Indus Net Technologies are always ready for a challenge. They agreed to finish the project in just a month and half.

### Integrating CRM with ERP and eCommerce Website

A major challenge related to integrating ERP with CRM relates to third party API permissions. One cannot know which format the API belongs to and one can only work with the permissions that the API format allows. Indus Net Technologies steadfastly customized the CRM to integrate it with the ERP of the company. As Sugar CRM is open source, it was slightly easier to do so, while also remaining cost-effective. It might be helpful to know that Sugar CRM is built on PHP which is open source too, and it always helps to use open source platforms when one requires a lot of customizations.

One of the most important roles of a web app is to present information in a way that it is processed easily. This is where the importance of catalogue product management arises. Our custom CRM helps the company to manage its products, their features, maintain and track their stock, fix and assign prices, upload images that are attractive, add descriptions and assign active or inactive statuses before they go on sale.

The client was able to deploy a web-based CRM that was not only mobile responsive, but also quick and easy to load, had an attractive UI and came with an additional feature of supplier management system.

### Open source CRM integration could just be the answer

Whether it is a steel manufacturer or another manufacturing company, lead management solutions need to be integrated with CRM, which on the other hand work better if integrated with an existing ERP or eCommerce website. To make these integrations successful, it helps to use open source platforms whose APIs are easily available. Even if they are not, Indus Net Technologies knows how to arrive at a solution without causing a financial burden on the clients. If you are looking for a similar solution to build a web-based CRM platform for your company, **contact us today** to learn how we can help.

“ A lot of information was not available, so we had to create a lot of things from the scratch. Moreover, the client wanted the CRM to be integrated with their eCommerce websites. While this sounds easy, it is not always so if there are some permissions that are not being given away easily. Yet, we have managed to integrate the CRM very well ”

- Project Manager

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## ABOUT THE CLIENT

The client is a leading iron and steel company in India and was incorporated in several decades ago. It is a premier steel reinforcement enterprise that has specialized in products such as beams, channels, angles, etc. The company also sells thermo-mechanically treated bars. All its products are registered with BIS and the company is one of the largest conversion agents in Eastern India. The company has strived to be one of the top steel manufacturers in the world, and its new CRM is helping it to achieve its dreams.



## ABOUT INDUS NET TECHNOLOGIES

Indus Net Technologies is an award-winning, global digital service company, providing enterprise mobility, mobile app development, web application development, analytics and digital marketing solution to mid-large enterprises across forty countries through its offices in India, UK, USA, Canada, Singapore and Saudi Arabia.

Indus Net have proven expertise in Financial Service/BFSI, Media, Publishing, Entertainment, Retail, Health and Professional Services business verticals.

With a team of 750+ digital professionals and experience of executing 11000+ projects over two decades, Indus Net have touched over 200m+ lives.

Being ISO 9001, ISO 27001 certified and appraised for CMMi Level3, Indus Net is known for agility, partner approach, innovation and technology excellence.

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