<SMYT>

SMYT PROJECT

SUITE CRM: AUTOMATING THE BUSINESS PROCESSES OF A LARGE LOGISTICS COMPANY

SOFTWARE DESCRIPTION

Our client is a large company that works in the field of transport and warehouse logistics. To automate its business processes, the company has been using SuiteCRM, an open source CRM system, for several years. SuiteCRM provides an extensive functionality for data accounting, analysis and processing.

At some point, our client needed a deeper refinement of the system in order to fully meet all the real requirements of the business.

TASKS

The tasks set by the client:

• To expand the functionality of such modules as Transaction, Contractors, Contacts, Contracts, Meetings;

• To set up menus and user pages;

• To develop additional CRM modules;

• To implement different procedures for primary data validation;

• To develop reporting units for managers and frontline employees;

• To install and customize such additional external modules as Analytic Reporting Tool Basic, Account Global View, User Activity Analysis;

• To set up users' access rights;

• To convert existing data obtained during a considerable period of time;

• To train company's employees.

RESULTS

Developed due to open source and flexible architecture benefits, SuiteCRM has made it possible to automate any, sometimes complex client business procedures. In the course of the project, the following was done:

- The functionality of individual modules and the system as a whole has been radically expanded.

- Complex chains of transaction by trade stages have been automated.

- Complex data validation procedures have been implemented.

All this facilitated the work with CRM, drastically reduced the number of human errors, and improved the quality of initial data in the system. As a result, it became possible to form reliable operational and management reports.

We have developed several reporting units for employees and managers of different levels, including a reporting unit for the company's management. These reports allow to assess rapidly the current state of affairs and to make ontime decisions, as well as to carry out an in-depth analysis aimed at making strategic management decisions.

Automatic monitoring of time necessary for the task completion increased the overall level of performance discipline and reduced financial losses.

A system of individual planning has been introduced, allowing the company's management to monitor the quantitative and qualitative performance of each employee.

In addition, the system interface has been set up: the user's homepage now contains all the information they need

⟨SMYT⟩

MAIL@SMYTSOFT.COM

HTTPS://SMYTSOFT.COM
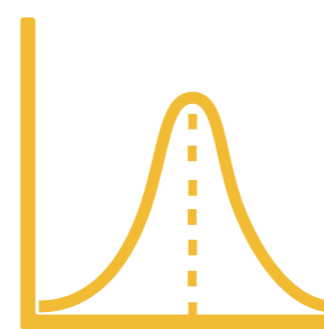
+1 (347) 918-39-69

WWW.LINKEDIN.COM/COMPANY/SMYT

TECHNOLOGIES

Python, **JavaScript**, Apache, MySQL.

PROJECT BENCHMARKS

External modules deployed

3

External modules changed

5

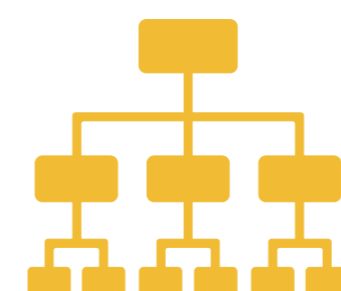**New modules developed**

2

Number of hours spent by devs

200+

Number of reports/ dashlets created

18 / 14

Number of users

20 sales assistants and managers

Projects team

4 developers

Complexity

8 out of 10