

Palm based Sales Force Automation

JVs and Branches:
India, United Kingdom,
Australia, Bahrain,
Japan, Singapore

The Client

This Sales Force Automation (SFA) application is developed in collaboration with a UK based client. This application provides mobile enabling the existing Sales Automation software developed by this company.

The Requirement

The SAP software, a total MIS solution developed by this company consists of 2 levels:

- SAP Data stores stored at central site
- MyOffice, the middle layer connecting the central data stores and the mobile application developed by TechUnified



This solution proved a great asset to all the businesses in UK and the world over that incorporated it in their business. The application was built for the desktop user intended to be in the office. The sales force personnel were required to carry printed documents for their on field work. Due to the ever-increasing demands of the competing market and the vast customer coverage the efficiency of their personnel was affected because of the paperwork they had to do both on the field as well in the office.

Thus, the client made a decisive move of developing a mobile-enabled application to be executed on the inexpensive PDA, the Palm Devices

SAP Mobile Application

The Benefits

The significance of the new system is that orders can be placed right there out in the field at the customers site and be synchronized with the main enterprise system without any duplicate data entry. This saves a great amount of sales personnel's time which in-fact he/she could utilize to better customer service.

Another important benefit is the about the scalability of the solution as multiple users can synchronize their information. Also the users can go for a remote sync, i.e. connecting to their office system from a remote place by dialing through the Palm device and initiating a modem HotSync, thus making it a truly mobile solution.

TechUnified – A Trusted Associate

TechUnified, because of its fast learning curve and Early Movers Advantage in the domain of SAP, was identified as an able partner of the client to implement SAP services and drive the company to the new domain. Consultants at TechUnified took the challenge to make a successful launch in this path breaking software.

The Solution

The decision was made to develop the mobile support on PDAs for the existing software. Each sales personnel would be handed over a Palm device loaded with the SFA application developed by TechUnified. This application would seamlessly integrate with the MyOffice application, which would in turn sync with the Data stored centrally.

At the start of each day, the sales personnel places the Palm device in the cradle and downloads the days work on to the device. The days work includes the necessary information about the customers based on the targeted sales area, the list of products, their pricing schemes, and the information about all the orders placed by those customers.

During his days work the sales personnel would be taking orders from the customers assigned to him. All these orders would be termed as MyOrders i.e. pertaining to this user. At the end of the day the user would be placing the device in the cradle at his office and upon pressing the HotSync button all the days work and the updated information would be synchronized with MyOffice. Finally all the collected information would be synchronized with the central data stores as required by the existing system.

The Palm device was selected because of its ergonomic design, clear and colored display and robust Palm OS. Also of importance were the competitive price and the fact that Palm devices were already being successfully used by other SFA companies.

The Future

TechUnified is considering a number of future enhancements to the system. These include the introduction of an invoice printing module and data export facility in XML standards format.

The Summary

The introduction of hand held computers will provide sales personnel with greater flexibility when talking their customers on the field. The crisp design of Palm device and user friendly software will enable them to work more quickly and efficiently.

Thus the end user expects to benefit from a significant increase in sales orders and revenues.