



BEAT • SALES FORCE AUTOMATION
UNIFIED DIGITAL ECOSYSTEM

THE CHALLENGE

Where a field sales business leaks money

Most field sales businesses do not lack software. They lack one record. The cost shows up as quotations that arrive late, discount given away without an approver, and a renewal conversation that starts from the customer's version of events.



The field reports on paper

Visits written up that evening, or not at all; claims typed from memory.



Quotations live in spreadsheets

Each quote copies the last, and the discount was approved verbally.



Nobody owns collection

Invoices chased from memory; tax deducted at source reads as arrears.



Nobody knows what is installed where

Warranty is a guess: a covered repair billed, a chargeable one free.



Pay runs on spreadsheets

Commission and incentives nobody can reconcile to money collected.



The reports disagree

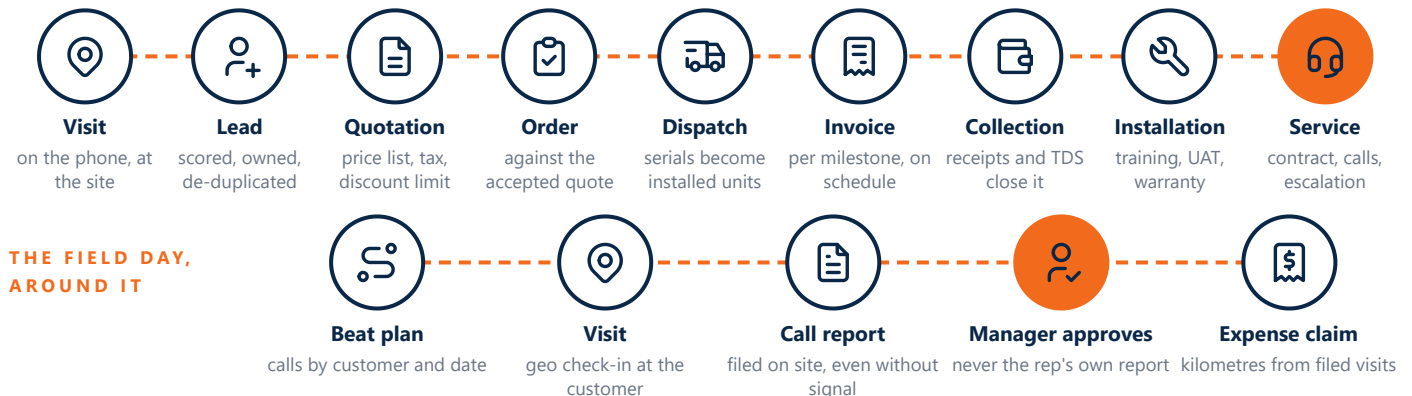
Sales, finance, stores and service each keep their own list.

Which cost you the most today?

Count it in your own business: days from visit to quotation, discount given without an approver, maintenance invoices nobody raised.

HOW IT WORKS

One record, from the first visit to the last service call



Nothing re-keyed, nothing orphaned. Each stage carries the last one forward, so a breakdown call five years on still points back at the unit, the order and the visit that started it.

WHO IT IS FOR

The same shape in four industries



Medical devices and equipment

Tenders with an earnest money deposit, installation and training, then the service contract.



Industrial and electrical

Site survey, quotation to a specification, commissioning, then a contract with response times.



IT, security and building systems

Project sales with milestone billing, a signed handover and preventive maintenance rounds.



Anything sold through dealers

Partner enquiries, dealer price lists with their own floor prices, commission on money collected.



Not a vertical build. Pipeline stages, numbering, discount ceilings, expense policy and the escalation ladder are settings. An industry difference is a configuration change, not a release.



One partner, one support desk. One partner and one support desk across ClinexGen products. A data link between Beat and LedgerFlow AI is on the roadmap.

WHAT IT DOES

Six jobs, one record



THE FIELD FORCE

A call report filed in the corridor

- Purpose, people met, competitor equipment, next action
- No signal? The call report is saved and sent later
- Beat plans measured: planned, made, missed, unplanned
- Claims from filed visits; nobody approves their own



ENQUIRIES AND PIPELINE

Every enquiry lands on the record

- A visit, a call, a tender, a campaign or your website
- Leads that age and score; duplicates merged
- A tender register with the deposit tracked apart
- Campaigns that attribute; follow-ups nobody forgets



QUOTATION TO CASH

The price was promised. The tax is right.

- Price lists: customer, dealer, default; floor price holds
- Discount over a rep's limit waits for an approver
- Recurring invoices on schedule, never twice
- TDS closes the invoice alongside the cash



STOCK AND THE INSTALLED BASE

Every machine shipped becomes a record

- Stock by branch beside a movement ledger
- Delivery challans: serials travel with the line
- Warranty dated from delivery, frozen onto the call
- Units leaving cover listed for the rep to quote



AFTER THE SALE

The work a service contract promises

- Response measured from the customer's report
- An escalation ladder you set; each rung fires once
- Preventive maintenance rounds per machine
- Resolved is not closed: the customer confirms it
- Annual maintenance contracts flagged before expiry



PORTAL, PARTNERS AND INCENTIVES

Customers, dealers and your people

- A portal: invoices, quotes, calls and warranty
- Channel partners active only after KYC
- Dealer commission accrues on money collected
- A leaderboard; amounts only for those allowed



Figures never restate themselves. Mileage, exchange, commission and TDS rates are frozen onto each document.



Nobody approves their own. Claims, discounts and incentive statements always need a second person.

TRUST

Who sees what, and how it is protected

ALL

Every record in the business: finance and management, typically.

TEAM

Their own records, plus everyone reporting to them.

OWN

Only what they own, or what their channel partner sourced.



See it in the demo. Open one customer list as a sales executive, then as finance. One is empty, one is full.

BUILT IN


Rights checked at every endpoint



7 staff roles; add more, no release



Append-only audit trail



Two-factor sign-in



Each customer in its own database



Provider secrets encrypted at rest



Location only at check-in, never all day



Cloud or your own data centre

Recovery targets, RPO and RTO, agreed per deployment. No external security certification is claimed.



36 of 42
capabilities live today

LIVE, AND IN DELIVERY

Live means shown running on the day of your demonstration. **In delivery** means built but not yet proven against the outside service it depends on, so never demonstrated or bid:



Single sign-on



Card and UPI collection



Government e-invoicing



WhatsApp notifications



Electronic signature



Inbound email replies

39 menus in 8 groups · 8 roles, including the customer portal · capability status as at 11 September 2026.

WHY BEAT

Six reasons that survive a second meeting


One record, visit to service call

Lead, quote, order, invoice, installed unit and service call.


Discount leakage stopped early

Limits by role, product and person, enforced before sending.


Cash, not just orders

TDS closes the invoice; recurring bills never go twice.


After-sales on the record

Warranty from delivery, preventive rounds, a renewal list.


Dealers on the same record

KYC first, own-scope logins, commission on collections.


Told what ships

36 of 42 live; the six in delivery are never demonstrated.

PLANS

Three plans, one build

Enterprise

PLAN 3

+ stock, dispatch, installed base, service, partners, branches

Professional

PLAN 2

+ quotation to cash, tenders, recurring billing, incentives

Standard

PLAN 1

Field force and pipeline: call reports, beat plans, expenses, leads, campaigns

Moving up switches modules on; nothing is migrated or deleted. Your commercial proposal covers the plan and team size you choose.

COMES WITH EVERY GO-LIVE

What you get on day one


Data migration, counts reconciled to your totals: customers by Beat's import, the rest loaded by our team

A dedicated support executive who knows your configuration

One support desk on +91 7338 786 196, one partner across ClinexGen products

Any team size, from one branch to many, on the same build

PLAN

Live in two months, branch by branch

PHASE	WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 6	WEEK 7	WEEK 8
Configure Stages, numbering, discount limits, roles	Week 1							
Migrate Customers by import; rest by our team		Weeks 2-3						
Train and pilot One team, one branch, real visits			Weeks 3-4					
Roll out Branch by branch, pilot team supports					Weeks 5-8			


We ask one thing: a named project owner on your side, and master data signed off in week 2.

NEXT STEP

See Beat run on your own pipeline


Working session

This week, one real visit


Fit and gap

Week 2, on one page


Proposal

Week 3, in writing


Pilot

15 days, no commitment

Then go-live in stages: configure, migrate, train and pilot, roll out: live in two months.

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