



BEAT • SALES FORCE AUTOMATION

UNIFIED DIGITAL ECOSYSTEM

THE CHALLENGE

Where a field sales business leaks money

**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.

THE COST OF DOING NOTHING

Most field sales businesses do not lack software. They lack one record.

Sales

Finance

Stores

Service



One record
four lists become one

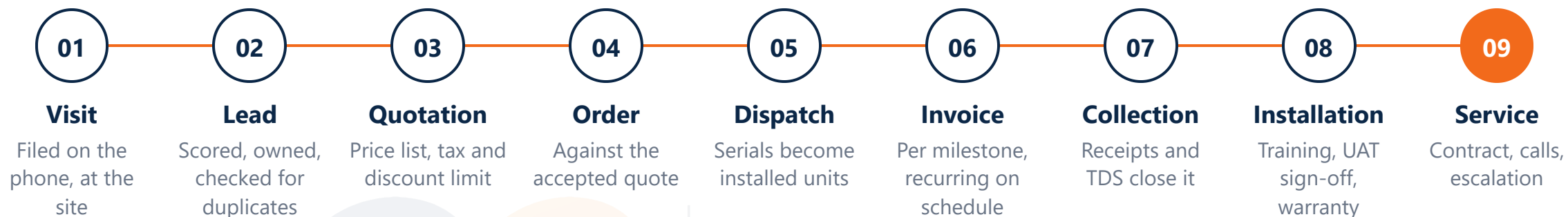
Which cost you the most today?

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

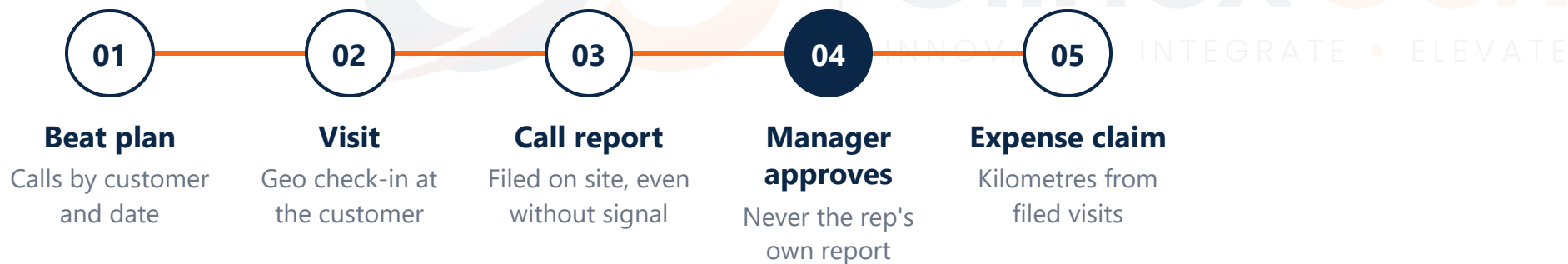
HOW IT WORKS

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

THE DEAL



THE FIELD DAY, AROUND IT

**NOTHING IS RE-KEYED**

The quotation starts from the lead, the order from the accepted quotation, and the invoice from the order.

NOTHING IS ORPHANED

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

Stages, discount limits, expense policy and escalation are settings, 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.

BEST FIT

You quote, deliver, install and service equipment, projects or contracts, directly or through dealers, from one branch to many. Beat is not built for retail order-taking or secondary sales.

WHAT IT DOES · THE FIELD FORCE

A call report filed in the corridor

The daily call report is the one thing the whole system depends on.

FILED

- ✓ Filed at the customer's site
- ✓ No signal? The call report is sent when it returns
- ✓ Kilometres flow into the claim

**Call reports**

Purpose, people met, competitor equipment and next action.

**Beat and tour plans**

Approved routes measured: planned, made, missed and unplanned.

**Attendance**

Worked out from check-ins, approved leave and holidays.

**Expense claims**

Kilometres from filed visits; nobody approves their own.

**Call logging**

Dial from the record; the outcome is a field, not a note.

**Call reports without signal**

Installs to the home screen; the call report saves offline and is sent later.

GEO CHECK-IN, BY DESIGN

A physical visit cannot be submitted without a geo check-in at the customer, and is marked **Verified on site** or **Outside the geo-fence**. Beat verifies the visit, not the rep's whole day: no continuous trail, no live map.

WHAT IT DOES · ENQUIRIES AND PIPELINE

Every enquiry lands on the record

FIVE WAYS IN

- ✓ A field visit
- ✓ A telephone call
- ✓ A published tender
- ✓ A campaign
- ✓ Your own website

ONE SET OF RULES

None can skip a check that a keyed enquiry obeys.

**Leads that age and score**

Your stages, scoring and ageing; duplicates caught and merged.

**A tender register**

Closing dates that cannot move; the deposit tracked apart.

**Enquiries from your website**

A form on your site feeds the pipeline; every submission kept.

**Campaigns that attribute**

Leads traced, orders won, cost per lead; opt-outs honoured.

**Wording you can edit**

Every email is a named template a customer's name cannot break.

**Follow-ups nobody forgets**

Owner reminders, overdue escalation, one working calendar.

THIRTEEN STAGES, ONE FORECAST

Each pipeline stage carries a win probability that drives the weighted pipeline and the forecast. A lead cannot reach **Quotation** without a sent quotation, or **Order** without a confirmed one.

WHAT IT DOES · QUOTATION TO CASH

The price was promised. The tax is right.



Quotations that add up

Line and header discounts, tax from the place of supply, one round-off, amount in words.



Price lists with floor prices

Customer list, then dealer list, then default. A price below the floor price is refused.



Discount authority

Limits by role, product and person; the tightest wins. A discount over the limit waits for an approver.



Currency to the receipt

A dollar deal stays in dollars to the receipt, with the rate frozen on each document.



Recurring invoices, never twice

The next unbilled milestone is raised on schedule. A missed quarter is caught; a duplicate refused.



TDS that closes the invoice

Tax deducted at source closes the invoice alongside the cash; missing certificates are listed.

Also on the chain: ageing buckets, a collections queue, and numbering per branch that resets each financial year. Nobody approves their own discount.

WHAT IT DOES · STOCK AND THE INSTALLED BASE

Every machine shipped becomes a record

STOCK AND DELIVERY



Stock by branch

A running balance beside a movement ledger: a correction is a movement, never an edit.



Delivery challans

Nothing leaves unordered, serials travel with the line, and an e-way bill above the threshold.



Spare parts issued and fitted

What an engineer carries is issued; what they fit is recorded on the visit.

THE INSTALLED BASE



Units on record

Customer, location, commissioning date and contract. A replaced unit points at its successor.



Warranty from dates

Dated from delivery on the product's term, and frozen onto the call.



Loaner and demo units

Issued, due back, and chased when overdue; an extension re-arms the chase.

Two lists, not automatic quotes: units with no cover, and warranties about to end, go to the rep to quote.

WHAT IT DOES · AFTER THE SALE

The work a service contract promises

A contract records what was sold. What it obliges is engineers turning up, and the renewal is judged on that.

RESOLVED IS NOT CLOSED

The engineer records the work done; the customer records that it agrees. Separate permissions.

MEASURED FROM THE REPORT

Response and resolution run from the customer's report, with the terms frozen onto the call.

**Escalation you set**

Rungs by module and elapsed time. Only the highest rung due is raised, and each fires once.

**Preventive maintenance**

Rounds per machine, the next counted from the visit that completed it, not the due date.

**Visits and parts**

Who attended, what was fitted, and whether each part is chargeable under the cover.

**Asked on closure**

One question, answered without a login. A poor score reaches the engineer's manager at once.

**Annual maintenance contracts**

Cover dates, value, account manager; flagged before expiry.

**A renewal list to quote**

Units leaving warranty or contract, listed for the rep to quote.

WHAT IT DOES · PORTAL, PARTNERS AND INCENTIVES

Customers, dealers and your people



Customer portal

Customers see their invoices, quotes, calls and warranty.

- ✓ Their own records only
- ✓ Calls run on the same clock
- ✓ Invited by an emailed link



Channel partners

Dealers onboarded, agreed and paid on collected money.

- ✓ Active only after KYC
- ✓ Agreement expiry reminders
- ✓ Commission when customers pay



Incentives

Your people paid by achievement band against target.

- ✓ Band ladders against target
- ✓ Nobody approves their own
- ✓ Leaderboard, amounts if allowed

ONE RECEIPT, TWO PAYOUTS

Dealer commission accrues on money received, and staff incentive schemes can be set to pay on collections too.

EACH SEES ONLY ITS OWN

A dealer's login sees only what it sourced; an executive sees only their own customers.

WHY BEAT

Six reasons that survive a second meeting

01



One record, visit to service call

Lead, quote, order, dispatch, invoice, installed unit and service call on one record.

02



Discount leakage stopped early

Limits by role, product and person, enforced before the quotation leaves.

03



Cash, not just orders

Recurring invoices never twice; TDS closes the invoice; a collections queue.

04



After-sales revenue on the record

Warranty from delivery, preventive rounds, and a renewal list to quote.

05



A dealer network on the same record

KYC before activation, own-scope logins, commission on money collected.

06



Told what ships

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

INNOVATE • INTEGRATE • ELEVATE

HOW BEAT COMPARES

Where Beat differs from what you would otherwise buy

Compared by category, not by product. Individual tools vary; every Beat cell is live today.

What matters	Spreadsheets and paper	Generic field-tracking apps	CRM suites	Beat
Installed base and service	A list nobody updates	Task tracking only	A separate service module or licence	Dispatched serials become installed units; service calls on the same record
Warranty and contract renewals	Remembered, or missed	Not covered	Usually a separate module	Warranty from delivery; units leaving cover listed to quote
Cash, with TDS	Chased from memory	Not covered	Invoices usually sit in the accounting system	Receipts and tax deducted at source close the invoice
Dealer commission	Worked out by hand	Not covered	A partner add-on, configured per project	Accrues on money collected; dealers see only their own
Discount control	Approved verbally	Not covered	Approval workflows, configured per project	Limits by role, product and person, enforced before sending
Visit verification	Written up later	Location trail and selfie attendance	Mobile check-in, depending on the add-on	Geo check-in at the customer before a visit is submitted

Table stakes Beat also meets: offline call reports, role-based access, an audit trail and tiered plans. We do not sell them as the difference.

TRUST · ACCESS AND SECURITY

Who sees what, and how it is protected

DATA SCOPE: WHOSE RECORDS A ROLE CAN TOUCH

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 without a release
- ✓ Append-only audit trail, before and after
- ✓ Two-factor sign-in with recovery codes
- ✓ Each customer in its own database
- ✓ Provider secrets encrypted at rest
- ✓ Location taken 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.

TRUST · WHAT IS LIVE TODAY

What is live today, and what is not yet

36 of 42

capabilities are live today, and can be shown running on the day of your demonstration.

LIVE

In the product today, and demonstrable.

IN DELIVERY

Built, but not yet proven against the outside service it depends on. Never demonstrated, warranted or bid.

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

THE SIX IN DELIVERY

**Single sign-on**

OpenID Connect against your staff directory

**Online card and UPI collection**

A payment link per invoice, receipt recorded

**Government e-invoicing**

IRN and signed QR code from the portal

**WhatsApp notifications**

Approved templates over the Meta Cloud API

**Electronic signature**

Envelope to the signer, signed copy filed

**Inbound email replies**

Replies matched through your mail provider

VALUE · YOUR NUMBERS, NOT OURS

Where the return comes from

We publish no payback percentage. We measure these eight levers with you, on your own figures, before and after the pilot.

Lever	How Beat changes it	What we measure
Quotations lost to delay	The enquiry becomes a quote on the same record	Days to quotation
Discount leakage	Discount limits enforced before the quotation is sent	Average discount
Collection days	A collections queue; TDS no longer reads as arrears	Days outstanding
Recurring invoices missed	The next milestone raised on schedule, never twice	Missed a quarter
Renewals and warranty lapses	Expiry and lapse become lists the rep is sent	Renewal rate
Service calls out of commitment	Measured from the report, escalated up your ladder	Breaches a month
Expense claims outside policy	Distance from filed visits; breaches flagged	Claims out of policy
Commission and incentive disputes	Commission accrued on money actually received	Disputes a quarter

VALUE · PLANS

Three plans, one build

PLAN 1

Standard

Field force and pipeline

- Call reports, beat plans, expenses
- Leads and campaigns

The core, for one team or site

PLAN 2

Professional

Everything in Standard, plus

- Quotation to cash, price lists
- Tenders, recurring billing
- Targets and incentives

More depth, on the same record

PLAN 3

Enterprise

Everything in Professional, plus

- Stock and dispatch, installed base
- Service, channel partners
- Multi-branch

All of it, across branches

EVERY PLAN INCLUDES

- ✓ 15-day pilot: one branch, one team, no commitment
- ✓ Live in two months, branch by branch
- ✓ Data migration, counts reconciled to your totals
- ✓ A dedicated support executive
- ✓ Cloud or on-premise, your choice
- ✓ No data deleted if you move to a smaller plan

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

PLAN · GO-LIVE

Live in two months, branch by branch

WEEK 1**Configure**

Stages, numbering, discount limits, roles and expense policy.

You: a named project owner

WEEKS 2-3**Migrate**

Customers through Beat's import, with a duplicate check. Installed base, open pipeline, products and price lists loaded by our team.

You: master data signed off in week 2

WEEKS 3-4**Train and pilot**

One team, one branch, real visits.

You: the pilot team's time

WEEKS 5-8**Roll out**

Branch by branch; the pilot team helps.

You: the order of branches

COMES WITH EVERY GO-LIVE

Data migration with counts reconciled to your totals · a dedicated support executive · one support desk on +91 7338 786 196 · any team size, on the same build.

MIGRATION, STATED PLAINLY

Only customers have an import screen in Beat. The rest is keyed in or loaded by our delivery team, and your sales operations signs off the counts.

WHO STANDS BEHIND IT

Who stands behind Beat



A founding team, not a first attempt

Founded by a technocrat, an industry leader and a marketing professional, with more than 50 years of combined experience.



DPIIT-recognised

Recognised by the Department for Promotion of Industry and Internal Trade, Government of India.



One platform, seven products

Casebook, Nucleus, Nalam360, MediBridge LabCore, MediBridge Connect, Beat and LedgerFlow AI, in three verticals, built to one engineering standard.



AI-enabled, always moving forward

An AI-enabled software development company, always moving towards state-of-the-art technology.

WHAT WE PUT IN WRITING

- ✓ Every capability labelled Live or In delivery before you evaluate
- ✓ A one-page fit and gap you keep
- ✓ A 15-day pilot on one branch, with no commitment
- ✓ Migration counts reconciled to your own totals
- ✓ One partner and one support desk across ClinexGen products
- ✓ You stay the data fiduciary; your data leaves in an agreed format, with a deletion certificate

NEXT STEP

See Beat run on your own pipeline

Run on your territories and discount rules, not a demo dataset, then carried into go-live.

01 · THIS WEEK**Working session**

Your territories, price list and one real visit.

02 · WEEK 2**Fit and gap**

What does not fit as shipped, on one page.

03 · WEEK 3**Proposal**

Your plan and team size, in writing.

04 · 15 DAYS**Pilot**

One branch, one team, no commitment.

05 · THEN**Go-live in stages**

Configure, migrate, train and pilot, roll out: live in two months.

WHAT THE 15-DAY PILOT PROVES

One real field day with geo check-in and approvals, then enquiry to quotation with a discount approval, order, dispatch with serials, invoice, receipt and TDS, installation, a service call and the renewal list. Each pass mark is agreed in writing in the trial plan.

APPENDIX · EVERY LIVE CAPABILITY, AS AT 11 SEPTEMBER 2026

36 capabilities live today



Field force and pipeline

Daily call reports · Beat and tour plans · Attendance and leave · Travel expenses and advances · Call logging · Leads and pipeline · Tender register · Customers, 360 view · Follow-ups, tasks, calendar



Customers and engagement

Customer portal · Campaigns and email templates · Web-to-lead



Quotation to cash

Quotations · Price lists · Discount authority · Multi-currency · Orders and invoicing · Recurring billing · Receipts and collections · Tax deducted at source



Control and access

Roles and data scopes · Audit trail · Two-factor sign-in · Document signature, paper



Stock, delivery and after-sales

Stock and dispatch · Installed base and warranty · Spare parts and loaner units · Implementation and UAT · Service contracts · Service desk · Escalation ladder · Satisfaction surveys

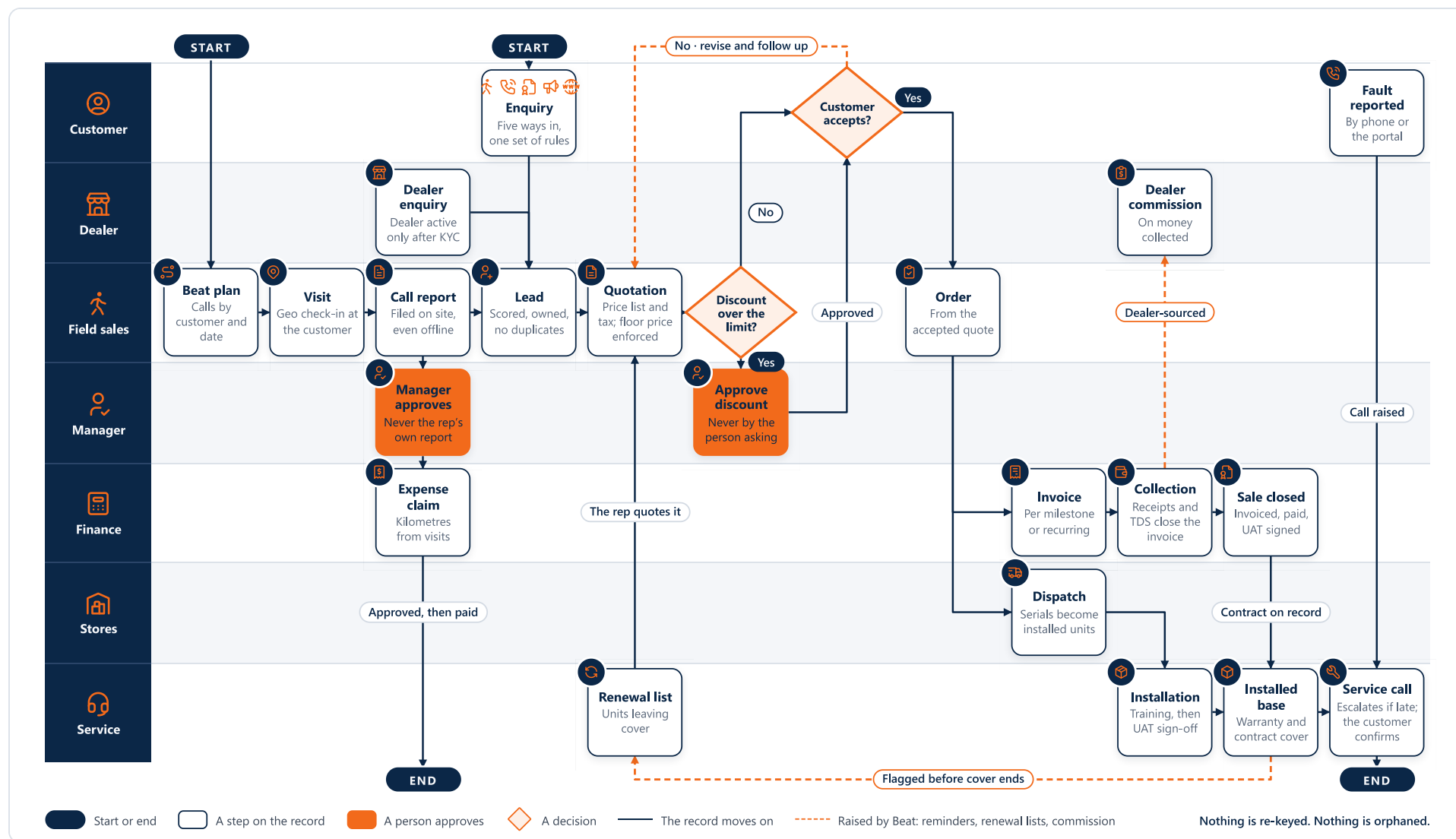


Partners, people and reporting

Channel partners · Employee incentives · Targets and leaderboard · Reports

INNOVATE · INTEGRATE · ELEVATE

From the first visit to the last service call





THANK YOU

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