

Sales Activity Tool

Client Overview

The client is an industrial equipment supplier headquartered in the **United Arab Emirates**, operating across multiple countries. The company supplies large-scale heaters and chillers and manages multi-currency pricing, quotations, and sales orders. An internal system maintains all transactional and master data, including country, region, currency, and price lists.

Business Background

The organization manages a diverse global product portfolio across multiple regions and brands. Previously, each country relied on independent spreadsheets to handle item data, pricing, classifications, master data, and user access.

As the business expanded, the lack of centralized governance led to inefficiencies, pricing inconsistencies, and reporting challenges.

Key Challenges

1. Fragmented Product Data
2. Pricing Complexity
3. Limited Classification Governance
4. Lack of Upload Transparency
5. User & Access Control Complexity
6. Global Operational Requirements

Solution Overview

A centralized enterprise platform was developed with three primary pillars:

1. Item & Pricing Management
2. General Master Data Governance
3. Administrative & Security Control

The solution supports structured workflows, multilingual UI, bulk data handling at scale, and microservices-based scalability aligned with global enterprise standards.

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Solution Components

Item Master Module

A. Item Series Module

Impact: Standardized product grouping across global regions and significantly reduced manual maintenance.

B. Item Master Module

Impact: Established a single source of truth for item data across all operating countries.

C. Regional List Price Module

Impact: Improved pricing transparency, reduced inconsistencies, and enabled flexible global pricing strategies.

D. Master Data Management Modules

Centralized maintenance of:

- Brand | Factory | Segment | Group | Line | Category | Subcategory

Impact: Ensured standardized classification and improved reporting consistency.

E. Item Hierarchy Module

Defines structured parent-child product relationships for organized catalog management.

Impact: Enhanced navigation, reporting, and pricing logic alignment.

F. Process List Module

Tracks bulk uploads with full visibility into status (Success / Failed / In Progress), audit logs, and reprocessing capabilities.

Impact: Improved operational transparency and faster resolution of upload errors.

General Master Module

Centralized management of entity, region, and country-level configurations.

A. Entity Master

B. Region Master

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C. Country Master

Business Value:

- Standardized global governance
- Improved regulatory compliance
- Scalable expansion across regions
- Enterprise-level filtering, sorting, and export controls

Admin Module

Ensures centralized security, governance, and system configuration.

A. Role Configuration Module

B. User Master Module

C. Lookup Management Module

Impact: Enhanced system security, simplified administration, and enabled flexible configuration without development dependency.

Quotation & Order (OTS) Module

The Sales Activity Tool includes a structured **Quotation and Order (OTS – Order Transmittal System)** module to manage the complete sales cycle.

Quotation

- Generates quotes using data from Item, Pricing, and Master modules
- Margin-based approval workflow
- Multi-level managerial approvals with audit tracking

OTS (Order Transmittal System)

- Prepares lot sizes and manages customer deliveries
- Workflow-based order approvals
- Integrated with master and pricing data

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Business Impact:

Improved margin control, standardized approvals, and streamlined end-to-end quotation and order processing.

Key Platform Features

Multilingual Support

Available in **6 languages:**

- English | German | Russian | Czech | Hungarian | English (Australia AU localization)

Multi-Time Zone Operations

The system supports multi-time zone operations with accurate scheduling, auditing, and reporting.

Global Footprint

Operational across **13–14 countries**, enabling centralized governance with localized flexibility.

Large-Scale Bulk Data Upload

- Supports Excel-based bulk uploads, processing large datasets (lakhs of records)
- Provides upload tracking with detailed audit logs
- Enables reprocessing of failed records with automated email notifications

This significantly reduced manual processing time and improved data accuracy.

Business Impact

- Centralized data governance and reduced pricing inconsistencies
- Faster product onboarding and multi-region operations
- Improved audit, compliance, and secure access control
- Efficient handling of large-volume data across time zones

Conclusion

The Sales Activity Tool transformed fragmented regional systems into a unified, secure, and scalable global platform. By combining structured product governance, flexible pricing

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management, multilingual support, time zone adaptability, and high-volume data processing capabilities, the organization established a strong digital foundation for sustained international growth and operational excellence.

The screenshot displays the 'Quotes' section of the Sales Activity Tool. The interface includes a top navigation bar with the Willis+ logo, a UK flag, weather information for India (Viman Na...), and a 'prod support' button. Below the navigation bar, there are tabs for 'Mine', 'My Team's', 'All Quotes', and 'Pending my approval', along with a '+ New Quote' button and a search field. The main area contains a table with the following columns: #, Sys Ref #, Quote Date, Last Updated Date, EB Date, Closure Date, Region, Country, P, Quote Status, and Action. The table lists 8 quotes with various statuses like 'Draft' and 'Approved'. A pagination bar at the bottom shows '50 100 200 500 1000'.

#	Sys Ref #	Quote Date	Last Updated Date	EB Date	Closure Date	Region	Country	P	Quote Status	Action
1	KSA/2023/21620/PS1-R6	02-Dec-2024	02-Dec-2024	02-Dec-24		MEA	Kingdom of Saudi Ar...	Test Proj	Draft	...
2	OMN/2024/31243/PS1-R6	04-Dec-2024	05-Dec-2024	04-Dec-24	25-Feb-2025	MEA	Sultanate of Oman	Test Proj	Approved	...
3	KSA/2023/26010/PS1-R5	04-Dec-2024	06-Dec-2024	04-Dec-24		MEA	Kingdom of Saudi Ar...	Test Proj	Draft	...
4	ARE/2025/38306/PS1-R3	05-Jun-2025	05-Jun-2025	05-Jun-25	25-Apr-2025	MEA	United Arab Emirat...	Test - 11...	Draft	...
5	KAZ/2023/23618/PS1-R3	03-Dec-2024	05-Dec-2024	03-Dec-24		CIS	Republic of Kazakhst...	*ZANGAR	Draft	...
6	AUS/2025/42571/PS1-R2	07-Jul-2025	07-Jul-2025	07-Jul-25		ANZ	Australia	Testing G...	Draft	...
7	AUS/2025/38266/PS1-R2	07-Jul-2025	07-Jul-2025	07-Jul-25		ANZ	Australia	Ingenia L...	Draft	...
8	AUS/2024/37436/PS1-R2	08-Jul-2025	08-Jul-2025	08-Jul-25		ANZ	Australia	1 Centre #	Draft	...

The screenshot displays the 'OT Module' section of the Sales Activity Tool. The interface includes a top navigation bar with the Willis+ logo, a UK flag, weather information for India (Viman Na...), and a 'prod support' button. Below the navigation bar, there are tabs for 'OT List', 'Pending Approval', 'To be Approved', 'Approved', and 'Back to Quotes Module', along with a search field and a 'Reset' button. The main area contains a table with the following columns: #, Sys Ref #, Quote Date, Closure Date, Region, Country, Project, #, and Action. The table lists 3 OT items with various project names and dates. A pagination bar at the bottom shows '1 2 3'.

#	Sys Ref #	Quote Date	Closure Date	Region	Country	Project	#	Action
1	AUS/2025/38249/PS1-R1	20-Jan-2025	24-Feb-2026	ANZ	Australia	1 Centre Rd	1.1	...
2	AUS/2025/38197/PS1-R1	16-Jan-2025	24-Feb-2026	ANZ	Australia	143 Richard St Bentleigh D&C Dat...	2.1	...
3	RUS/2024/37461/PS1-R1	06-Dec-2024	06-Dec-2024	RUS	Russian Federation	2nd Upper Mikhailovsky passage ...	3.1	...

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The screenshot shows the main dashboard of the Willis+ Sales Activity Tool. At the top left is the Willis+ logo. The top right displays system information: 12:13 PM, 30.9 ° C, Clouds, India, Viman Na..., Tue, 24 Feb, and a 'prod support' button. Below the header is a navigation bar with 'Home / Admin /'. The main content area contains a grid of nine tiles: Activity Log, Role Configuration, Quote Approval Workflow, Caption Database, User Master, Quote Transfer, OT Workflow, Lookup Type, and Admin - old. At the bottom of the dashboard, there is a footer with '© - Copyright AHI-Carrier.' and '1.0.0.0'.

The screenshot shows the 'General Masters' section of the Willis+ Sales Activity Tool. The top header is identical to the previous screenshot. The navigation bar shows 'General Masters'. The main content area is a grid of 25 tiles representing various master data categories: Region, Country, Entity, Project, Customer, Landed Cost Master, Payment Term Master, Project Status Master, Incoterm Master, Fix Rate, Currency Master, Competitor Master, Probability Master, Project Type, Department, Customer Category, Application Type, Consultant, and Event Notification.