



Pratham Filters

"We were not that organized in the way we were managing our customers. Now, with Sage CRM and Sage 300, we can track customer details throughout, from sales to supply chain"

Ajay Shroff, Managing Director, Pratham Filters

Integrating proves transformational at Pratham Filters

A leading manufacturer and supplier of liquid and air filtration systems, Pratham Filters has built a foundation for future growth by switching to Sage products that allow the business to track and monitor every customer journey, from sales pipeline to order and delivery.

Outgrowing accountancy software

Headquartered in Mumbai with four offices around India, Pratham Filters employs 40 people and is growing fast. The firm had run its business with an accountancy package that was solely focused on the financials and struggled to keep pace with an increasingly complex supply chain. With over 100 customers and hundreds of prospects, the firm wanted to revisit its business management systems and put in place a solution that would provide a single repository for all customer information, from sales pipeline to order processing, inventory, financials and supply chain.

Transition and training

Pratham Filters carefully researched the market and looked at a number of high profile business solutions before choosing Sage. Whatever it chose had to fulfill multiple criteria including compliance with Indian Tax and Statutory requirements. The decision was taken to go with Sage 300 and Sage CRM. The two packages are integrated out of the box, providing the single data repository that the firm needed to bring disparate parts of the business together.

Sage CRM was deployed after Sage 300, on site in Mumbai with around 20 licenses for employees in sales and customer facing roles. It was a big change for everyone but thanks to Sage training and the enthusiasm of employees, the new solution was soon reaping rewards. "There is always an initial challenge with new software as you get used to it, but after that, Sage has been very easy to understand. We have got to the point where we can quickly train up new employees," said Ajay Shroff.

Bringing it all together

For a supplier and manufacturer with business processes that extend from sales to supply chain delivery – with ordering and inventory management in the middle – the Sage products are a perfect fit. "From lead to prospect to offer and conversion, and then into accounting and finalization, everything is in Sage," explained Managing Director Ajay Shroff. "We have a lot of shipments and transactions which I can now see straight away – from when the order was lodged to when it will be delivered. The previous accounting system could never give me that." Sage CRM allows the firm to segregate leads – cold, lost, in progress – and plan a targeted approach to convert prospects and close deals faster. It also gives the company better reports that help with forecasting sales on a regional basis. "It's made a big difference," said Ajay Shroff. "I don't know how we would keep on working without Sage."