

# CASE STUDY

## Proposal Tool

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*For a leading USA based HVAC Distributor*

## INTRODUCTION:

Our client's need was to make the whole process of conducting business with more than a 1000 dealers a little more convenient and to remove the complexities in dealing with so many complex calculations to do business with each dealer and reduce the wastage of time and manual labor .

The client, having already worked with Wishtree before, approached Wishtree again to create a customized proposal tool to help them not only get over the challenges already mentioned but to also give their business a technological edge and so the whole vast process becomes a little more organized.

Wishtree not only delivered what was asked but also provided extra benefits to show appreciation for the budding partnership.

What extra benefits did we think of and provide to make the handling of such a complex, gigantic business easy? Read on to know!



## THE CLIENT

Our aforementioned client is one of the leading HVACR wholesale distributors in USA and operates in 25 locations and warehouses in the USA.

## BUSINESS CHALLENGE

The challenge faced by the client was due to their vast operations. Due to being a big company, our client has to deal with more than a 1000 dealers to conduct business. This made deciding and analyzing the price structure a very complex task. The client wanted to offer every dealer a different price range depending on their profitability and the amount of repeat purchases. To do this, a lot of complex calculations had to be done which required a lot of manual labor and time and sometimes couldn't be solved even then. The client then contacted Wishtree to help them build a tool to make their process simpler and also save their time in addition to making their business activity a little more tech savvy.

## WISHTREE SOLUTION

Wishtree analyzed the needs of the client and worked on the perfect proposal tool for them with the following features:

- Automatic and fast price calculations including discounts, etc.
- Tool for analyzing price structures and decide the appropriate price level for each dealer
- Access to past Order History
- Storage for all the data for future use and analysis
- Option to build and mail proposal to the client immediately from phone or save for later use
- Printing option
- Website also responsive in mobiles

# TECHNOLOGY STACK

- **Client:** JavaScript- jQuery, HTML5, CSS3
- **Server:** JEE, Struts, JPA
- **Database:** MySQL
- **Application/Web servers:** Apache-tomcat, Apache

# BENEFITS DELIVERED

- More efficient and accurate calculations
- Elimination of wastage of time and better use of human resource
- Ease in analyzing and deciding the price levels for each dealer
- Better and more organized maintenance of records and deals
- On the spot proposal generation with just a mobile to impress clients

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**Wishtree Technologies** | We **understand**, We **deliver**

For more information, contact [info@wishtretech.com](mailto:info@wishtretech.com)

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## About Wishtree

Wishtree delivers technology-enabled business solutions that help global companies to improve operational efficiency and reduce costs.

We are : Small Enough to Listen, Big Enough to Deliver