Proposal

E Solution Group is a professional contractor company that provides real estate / buildings’ maintenance including elevators, low-voltage facilities and other class II works. The current work flow in E-solution group is summarized as follow:

1. Maintenance request initiated by building /property managers
2. Consultant is assigned to the case and write out the specifications, the case might involve multiple types/categories of vendors
3. The case is assigned to sales team and sends out quotation requests to subcontractors
4. Sales consolidate all quotations and pass back to consultant
5. Consultant meets with building / property managers and propose solutions
6. Subsequent rounds of quotations (if necessary)
7. Building / property manager signs back quotations
8. Subcontractors begin work and provides progress reports, interim payments
9. Consultant performs inspection and issue final report
10. Final payment

Each of these steps may vary based on client requirements, vendor practices and types of work. Duration of work may vary from a few hours to a few months. Currently all of these work are tracked by paper hard copies and XLS.

This currently presents some major challenges:

1. The consultant is the single point of contact for a project, if the consultant is on vacation, re-assigned or even left the job, a project may go unattended and all past history will be lost
2. All payment information are poorly documented. Pulling a payment record requires opening up multiple XLS and paper trails.
3. No payment reminders
4. No contract end reminders
5. Audit and approval trails are all human error prone

The goals of this project is to enhance this process and implement an ERP (enterprise resource planning system) to:

1) Provide a standardized application process for all contracts

2) Reduce the document processing time

3) Create a more transparent environment for contractors and building managers

4) Assist accounting staffs to setup payment reminders and

5) Establish an repository for past contracts

6) Financial reports

By the completion of this project, E-Solution would be able to:

1) Reduce documentation efforts. Currently for all submissions, all progress and work flow are stored using XLS and paper hard copies. This is extremely error-prone and labour intensive, the situation is worse if a client requests past information on a particular project. This will take days if not weeks to gather all necessary information. With the introduction of this digital platform, we will be able to pull all related information about a client, a project, or even a vendor real time.

2) Standardize the submission process. Currently the information required for each contract is communicated via email or phone. Sometimes the communication are not standardized and formalized, not only this increases the time required for collecting all information, it also puts a lot of pressure on human resources on vetting the information. Sometimes an contract takes more than a few months to complete, and the situation is worse if our staffs is on leave or reassigned to other projects. The digital platform ensures that all necessary information are completed and all applicants are aware of and fill in all required information.

3) Information backup and analysis. Currently we do not have an official contract digital archive, pulling the project information is currently time consuming and error prone, which hinders our ability to evaluate the success of each contract, and reduces our effectiveness to compare different vendors. With the development of the platform, we can ensure that all contracts are stored properly in a standardized way. Pulling reports, summaries, and performing evaluations will all be done on the system real time.

4) Financial reporting. Currently payments, payment due dates and payment proofs are all stored ad-hoc. Different payment methods have different proofs of payment and are stored on a best-effort bases. With the introduction of this platform all payments will be stored and processed the same way, with proper reminders and due dates. This enable real time reporting on invoices and payments.