



Developing Your Business Solutions

INTOROCUTION

RELISYS ERP

Abstract

This document contains an overview to RELISYS ERP.

Solution Heights Team

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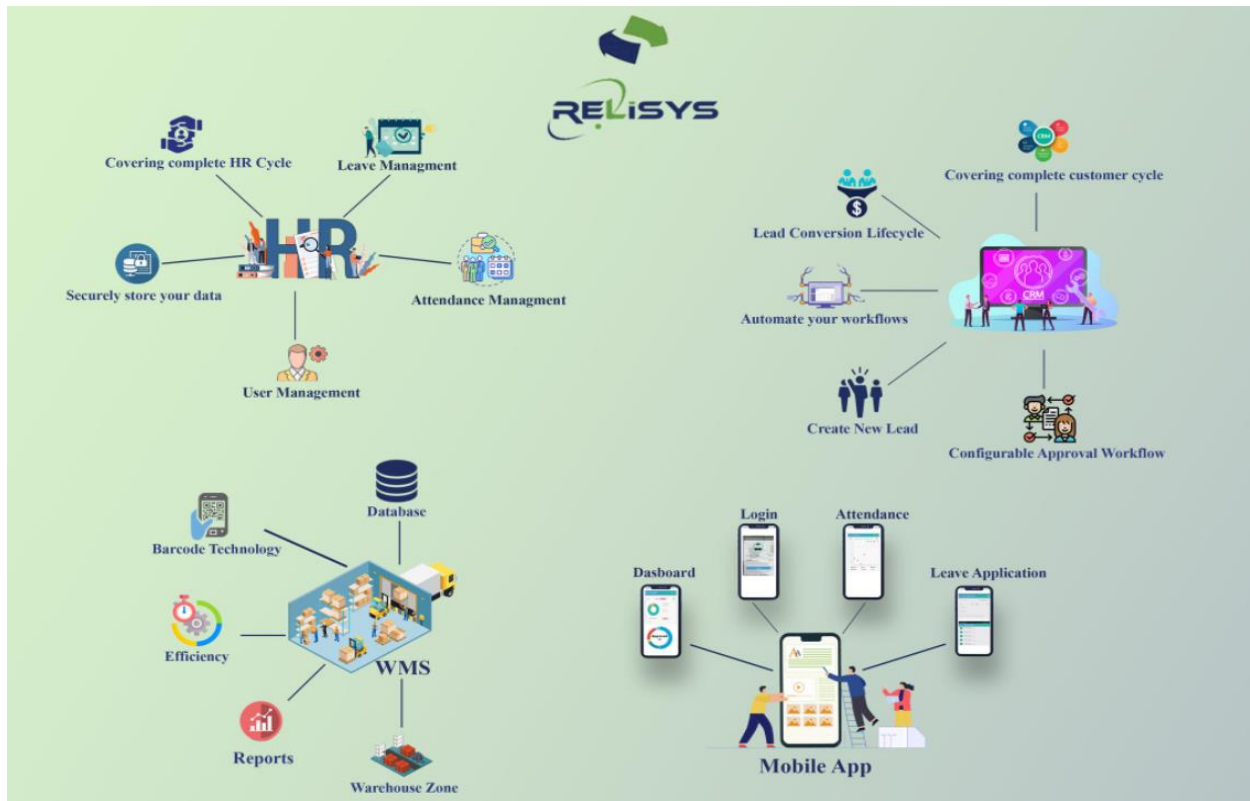
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Introduction

Keeping things organized is a challenge for business. Nowadays businesses are using multiple platforms including spreadsheets, google sheets, online CRM, and other standard modules to manage different aspects; which makes difficult to get consolidated view of business performance, which includes accounting, payroll, supply chain, inventory to name a few.

RELISYS ERP resolves above problems by managing the resources:

- i. One stop shop: RELISYS ERP offers all the required modules under one umbrella; which includes:
 - a. Human Resource Management
 - b. Customer Relationship Management
 - c. Operations Management
 - d. Warehousing
 - e. Inventory Management
 - f. Financial Management
- ii. Enhanced Business Reporting
 - a. Built in module wise dashboards
 - b. BI dashboards for real time business insides
 - c. Increases Transparency
- iii. Business Process Improvement
 - a. Implementing a standard module allows business to follow a standard process to eliminate waste.
 - b. Automate manual process flows with configurable workflow engine
 - c. Reduce associated cost
- iv. Supply Chain Management
 - a. RELISYS ERP covers all the components of a supply chain; Transportation, Customer Clearance, Sea Freight, Air Freight, Inventory and Procurement, Warehousing, and Operations (Job Management)
 - b. Ensures optimum level of inventory.
- v. RELISYS Mobile App
 - a. RELISYS ERP has built in android app as well; which empowers business users to perform daily tasks from their mobile phone.



Mobile App

Login

- Self Service Portal
- Integrated Push Notifications
- High Quality Image Resolution
- Responsive App Design
- Robust Security

Dashboard

- Dashboard Components including Salary Slip
- Download supported
- Notifications / Approval Workflow

Attendance

- View Current Month's Attendance Status
- Apply Attendance

Leave Application

- View Leave Balance
- Apply for Leaves
- Leave Listings

CRM

CRM Mobile app allows Sales person to view associated Customers from Mobile app, and Sales person can create new activities (Calls / Meetings) from the same menu.

CRM App allows sales person to view customer's important information as well like Credit Limit, Credit Days, and available credit limit.

WMS

Mobile App Version

Mobile app version is also available for warehouse.

ASN Put away

This is a put away request in this request we select ITS General or Zone.

Dispatch Orders

In dispatch order listing all orders that dispatch order shows in listing.

Pallet Search

It's a computer generated pallet search list of products.

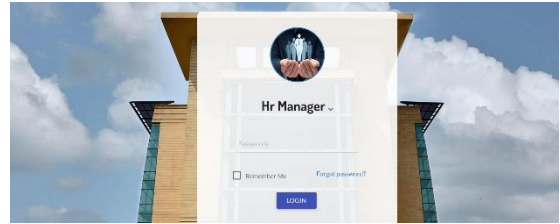
The Enterprise, building 2 , 4th floor
1 km Thokar Niaz baig, Multan Road. Lahore

(042) 111 722 947

<http://app.relisystems.com.pk/>

1) Why to Choose RELISYS HRM?

The basic function of HR software is to make your HR processes more efficient. A software system with integrated modules can automate many of the processes that take up the bulk of your HR department's time. HR system modules can:



a) Automate your workflows

RELISYS HRM has inbuilt automated tools to decrease the need for manually inputting data, eliminating the risk for errors while saving time and resources. HR modules can create custom workflows to support your HR processes.

b) Securely store your data

HR software can ensure your employees' sensitive data is secure. Breaches in security can not only breach the trust of your employees, customers and partners, but help you remain compliant by adhering to data privacy laws. Cloud-based HR system modules have built-in layers of protection, like access restriction and two-factor authentication, to protect all your data.

c) Covering complete HR Cycle

RELISYS HR module covers the complete HR cycle for an employee. Starts from recruitment, onboarding, Develop, Retain, and Off boarding.

d) Compliance

It helps organizations in meeting the legal requirements. Configured EOBI deduction and income tax withholding slabs, withholding statement, and PSID report make it easier for organizations to meet compliance requirements.

e) Web based application

RELISYS HR Module is web-based application, which can be accessed easily from anywhere. You just need a stable internet connection and browser to access your login with all configured authorities.

f) Mobile App:

RELISYS HR mobile app enables employees and approving authorities to perform required functions by using mobile devices. RELISYS mobile app is readily available on Google play store.



Human Resource Management

Why to Choose RELISYS HRM?

Automate your workflows

RELISYS HRM has inbuilt automated tools to decrease the need for manually inputting data, eliminating the risk for errors while saving time and resources. HR modules can create custom workflows to support your HR processes.



Covering complete HR Cycle

RELISYS HR module covers the complete HR cycle for an employee. Starts from recruitment, onboarding, Develop, Retain, and Offboarding.



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Web based application

RELISYS HR Module is web-based application, which can be accessed easily from anywhere. You just need a stable internet connection and browser to access your login with all configured authorities.



Mobile App

RELISYS HR mobile app enables employees and approving authorities to perform required functions by using mobile devices. RELISYS mobile app is readily available on Google play store.



User Management

Create and Manage User

User management module enables HR department to create user id and password for each employee. For creating user, you can search the specific employee and after providing user name and password.



User Interface

In user management, user interface functionality allows to map the defined role with specific system forms.



Workflow Management

RELISYS HRM approval workflow allows the user to define dynamic workflow against identified processes e.g. Leaves, Appraisals, etc.



Create and Manage Roles

RELISYS HR module allows to manage system access via system roles. User can create multiple roles in the system for specific user groups.



Update Profile

RELISYS HR module allows employees to manage their profiles as well. They can provide / update selective information as well.



Functions

User Management

Approval Workflow

Employee Management

Leave Management

Performance Appraisal

Configurations

Payroll

Employee Hiring

Attendance Management

Employee Separation

Attendance Management

Manage Shifts

RELISYS HRM module allows user to define multiple shifts as per requirements. User can assign a single shift to an employee and system will generate the schedule accordingly.

Attendance / Leave Upload Option

For the employees, who cannot mark the attendance on machines or machines are not available, RELISYS HRM allows to upload attendance in bulk for such employees. HR needs to identify such employees in profiles, and system will generate excel template for such employees.

Attendance Discrepancy

RELISYS HRM allows the employees to settle the discrepancies raised by the system after matching actual attendance data with configured shifts.

Attendance for Executive Employees or Where Exemption is required

RELISYS HRM allows to turn on auto attendance feature against specific employees, in this case, system will not generate any discrepancy and populates the attendance automatically.

Leave Management

Leave Policy

RELISYS HRM module allows to configure multiple leave policies covering Annual Leaves, Casual Leaves, and Medical leaves etc. Separate Leave policy for Male and Female staff can also be configured to cover the specific needs.



Apply Leave and Approval Workflow

Employees can apply leave from their logins via web application or mobile app. System will follow the configured workflow for leave approval. Employee can check the status of application any time from the listings.



The Enterprise, building 2 , 4th floor
1 km Thokar Niaz baig, Multan Road, Lahore



(042) 111 722 947



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2) Functions:

1. User Management
 - 1.1. Multiple Roles
 - 1.2. Map Roles with Interfaces
 - 1.3. Multiple company assignments
 - 1.4. Profile creations
2. Configurations
 - 2.1. Define Multiple Companies, divisions, departments, and Locations
 - 2.2. Define Multiple Job Descriptions
 - 2.3. Define Multiple Designations
 - 2.4. Define Benefits for positions.
3. Approval Workflow
 - 3.1. Process wise Approval Workflow
 - 3.2. Department wise approval hierarchy
 - 3.3. Approval workflow covering multiple authority assignment.
 - 3.4. Real time notifications for approving authority on Mobile / web app.
 - 3.5. Email initiation for pending workflows.
4. Employee Management
 - 4.1. Manage Employees
 - 4.2. Employee Transfer / Promotion
 - 4.3. Create Multiple shifts
5. Employee Hiring
 - 5.1. Employee requisition
 - 5.2. Job Portal
6. Leave Management
 - 6.1. Define Leave Policies
 - 6.2. Leave Policy Assignment
 - 6.3. Leave Balance Assignment as per Financial Year.
7. Attendance Management
 - 7.1. Configure and Assign Shifts
 - 7.2. Compatible with leading attendance machines.
 - 7.3. Manage Attendance Discrepancies
8. Payroll
 - 8.1. Import attendance from Attendance Machines.
 - 8.2. Single Click Month End Process
 - 8.3. Salary Slips
 - 8.4. Income Tax Withholding Slabs
 - 8.5. Generate PSID report and Withholding Tax Report as per FBR Format.
 - 8.6. Manage Employee Bonuses and Loans.
 - 8.7. EOBI Deduction
9. Performance Appraisal
10. Employee Separation, which covers employee's final settlement.

3) User Management

RELISYS user management module enables company to control access to core HR functions, with extensive set of tools to extract and identify data. It allows to define each employees level of access to data, based upon user department and role.

a) Create and Manage User:

User management module enables HR department to create user id and password for each employee. For creating user, you can search the specific employee and after providing user name and password.

The screenshot shows the 'Manage Users' interface with a header bar containing a home icon, 'Dashboard > Manage Users', and a date selector for '2 JUN 2021'. The main section is titled 'Add/Edit User' and contains several input fields: '*Division' (dropdown), '*Department' (dropdown), '*Employee' (dropdown), '*User Name' (text), '*Password' (text), 'Activate User' (checkbox), and '*Confirm Password' (text). At the bottom are 'Save', 'Clear', and 'Cancel' buttons.

You can manage existing users as well. Search specific user from user search screen.

The screenshot shows the 'Manage Users' interface with a header bar containing a home icon, 'Dashboard > Manage Users', and a date selector for '2 JUN 2021'. The main section is titled 'Search User' and contains several input fields: 'Division' (dropdown), 'Department' (dropdown), and 'User Name' (text). At the bottom are 'Search', 'Clear', and 'Cancel' buttons. Below the search section is a 'Users Listing' table with the following columns: Sr. #, Employee, Company, Division, Department, Branch, Designation, Employee Code, Username, Active, and Actions.

You can assign / update role rights, deactivate user, and assign approving authorities from the above screen as well.

- User Role Rights
- Approval Authority
- Re-Send A/C Notification
- Edit
- Remove

c) User Interface:

In user management, user interface functionality allows to map the defined role with specific system forms. Here system allows the user to search specific role, and assign the interfaces accordingly.

Dashboard > Manage Interface Rights

Add/Edit Role

Role Type: User Role: Accounts

User Interface Listing

Interface	View	Edit	Add	Delete
Terrestrial	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Division	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

d) Update Profile

RELISYS HR module allows employees to manage their profiles as well. They can provide / update selective information as well. HR department can require certain information from employees based upon certain events, e.g. evaluation or confirmation.

Personal Settings

* First Name: Last Name: Manager

Address: Old Address: Enter Old Address

Country: Pakistan City: LAHORE Area:

Insurance Plan: ☐

Official Email: * CNIC:

PF-Request Form

- Add/Edit Qualification
- Add/Edit Experience
- Add/Edit Family

e) Workflow Management

RELISYS HRM approval workflow allows the user to define dynamic workflow against identified processes e.g. Leaves, Appraisals, etc.

Approval Workflow

Dashboard > Approval Workflow

2 JUN 2021 2022

Add/Edit Approval Workflow

* Process Name -- Select One --

* Sequence	Division	Department	* Approval Authority	Action
------------	----------	------------	----------------------	--------

Workflow module allows to configure the workflow after selecting any specific process. User will be able to select relevant approval authority department wise, for example in below example HOD and Assistant managers are defined as approving authorities.

Add/Edit Approval Workflow

* Process Name Annual Leave Application

☐ Use Reporting To Employee as 0 level Approving Authority

* Sequence	Division	Department	* Approval Authority	Action
1	-- Author Division --	-- Author Deptt --	HOD	
2	-- Author Division --	-- Author Deptt --	Assistant Manager	

Add New

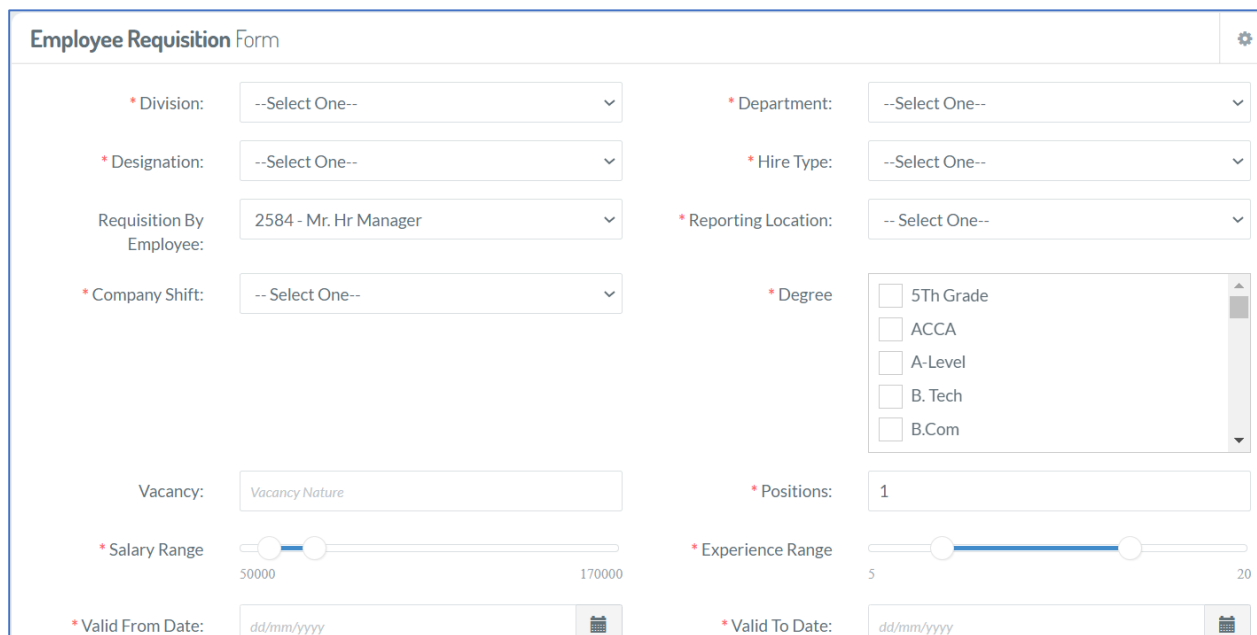
Save Clear Cancel

4) Employee Management:

a) Employee Requisition

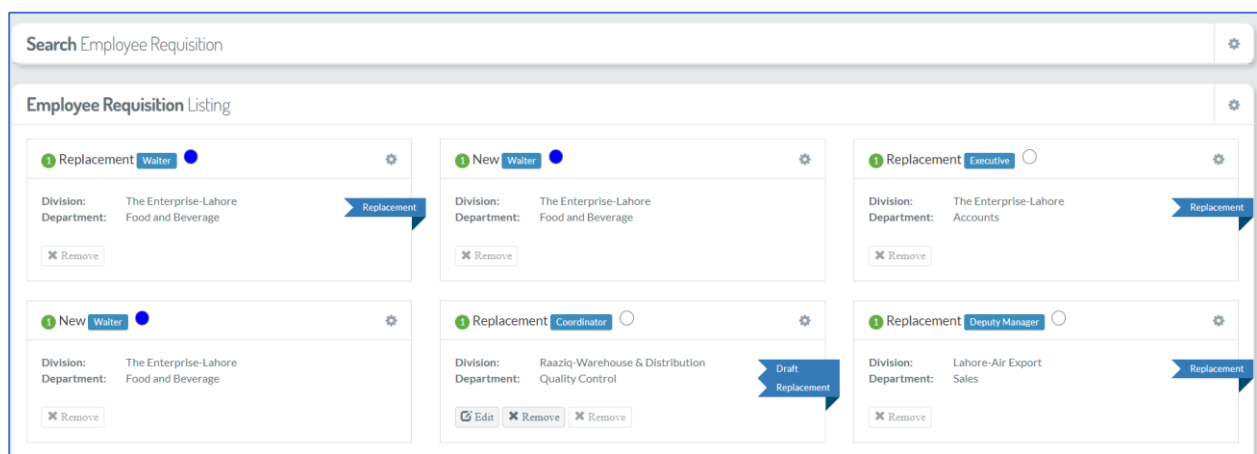
RELISYS HRM module allows any nominated person from a specific department to raise “Employee Requisition”. System identifies the hiring pattern from these requisitions e.g. New Hiring or Replacement, and maps out the position with over all company hierarchy. In employee requisition form, user can specify the requirements pertaining to this position e.g. degree, salary range, benefits, number of positions. This information will be helpful for hiring department to plan recruitment.

In case “Hiring Portal” is connected with this form, it can publish the job directly to the portal, after completing the attached workflow with employee requisition.



The screenshot shows the 'Employee Requisition Form' with various fields for creating a requisition. The form is organized into two columns. The left column includes fields for Division, Designation, Requisition By Employee (with a dropdown showing '2584 - Mr. Hr Manager'), Company Shift, Vacancy (with a dropdown for 'Vacancy Nature'), Salary Range (with a slider from 50000 to 170000), and Valid From Date. The right column includes fields for Department, Hire Type, Reporting Location, Degree (with a list of options: 5Th Grade, ACCA, A-Level, B. Tech, B.Com), Positions (with a dropdown for '1'), Experience Range (with a slider from 5 to 20), and Valid To Date. Each field has a dropdown or input mechanism, and there are 'Valid From Date' and 'Valid To Date' fields at the bottom.

User can search the existing requisitions as well and can create a copy to save data entry



The screenshot shows the 'Search Employee Requisition Listing' interface. It displays a grid of requisition cards. Each card shows the requisition type (e.g., Replacement, New), the position title (e.g., Waiter, Executive, Coordinator, Deputy Manager), the division, and the department. There are buttons for 'Remove', 'Edit', and 'Replacement' (or 'Draft Replacement' for the Coordinator position). The interface is designed to allow users to search for existing requisitions and manage them.

b) Define Employee

Employee can be defined against approved requisitions only. After selecting the requisition, system allows to define a new employee. Required information is divided in TABS / SECTIONS, so that user can easily navigate to the relevant section.

Employee Form

Company

Employee Name

*CNIC

*Personal Mobile

Official Mobile

*Date Of Birth

*Date of Joining

*Mother Name

Select file

Update Basic Info

Add/Edit Qualification

Add/Edit Benefit

Add/Edit Employee Reimbursement

Add/Edit Experience

Add/Edit Family

Add/Edit Documents

You can search any employee via employee search

Search Employee

Division

Department

Designation

CNIC

Name

Employee Number

-- Any --

-- Any --

-- Any --

Name

Code

Current Employees Only

Search

Reset

Cancel

Employee Listing

Employee Number

Name

Email

Status

Requisition

Division

Department

Designation

Active

Actions

c) Change Status

HRM module allows to change the status of employees as well e.g. any change in Division, Department, Location, Designation or Grade will be handled through this option. It will save the history as well, which will be helpful in maintaining the complete profile of employee's journey with the organization.

The screenshot shows the 'Status Change Form' interface. It includes a header bar with the title 'Status Change Form' and a settings icon. The form contains several input fields: a dropdown for 'Division' (selected: Faisalabad-Air Export), a dropdown for 'Department' (selected: Accounts), a dropdown for 'Employee' (selected: --Select One--), a date field for 'From Date' (selected: 01/06/2022), and a text area for 'Comments'. Below the form is a table with columns: Action, Code, Employee Name, Division, Department, Location, Designation, and Grade.

d) Letters

RELISYS HRM allows users to define dynamics letter templates, which system will generate for specific employees and system will automatically update the dynamic mapped fields with specific data of the employee. System maintains the complete log of all the letters issued to employee as well.

The screenshot shows the 'Letter Form' interface. It includes a header bar with the title 'Letter Form' and a settings icon. The form contains several input fields: a text field for 'Template Name' (selected: Confirmation letter), a text field for 'Subject' (selected: Confirmation letter), a dropdown for 'Letter Type' (selected: Confirmation Letter), and a text area for 'Description' (selected: Confirmation Letter). There is a checkbox for 'Active' which is checked. Below the form is a 'Content' section with a rich text editor. The editor has a toolbar with various icons for text formatting and a menu with options like 'Contract Letters', 'Terms And Conditions', and 'Merge Code'. The content area shows a list of dynamic fields: [REFNUM], [ISSUANCEDATE], [SALUTATION][FIRSTNAME] [LASTNAME], HRMIS ID: [EMPLOYEECODE], [CCEMPLOYEEDESIGNATION], [CCEMPLOYEEDEPARTMENT], [DIVISION], and Date of Joining: [DATEOFJOINING].

5) Attendance Management

a) Manage Shifts

RELISYS HRM module allows user to define multiple shifts as per requirements. User can assign a single shift to an employee and system will generate the schedule accordingly. Attendance will be captured against the saved shift and system will generate the discrepancy accordingly.

Add/Edit Shift

*Shift Name

Enter Shift Name

*Max Late Days

Max Late Allowed (Days)

*Grace Time

Enter Grace (Minutes)

General

Rotational

Is Alternative

Sr. No.	Day	Start Time	End Time	Break Start	Break End	Actions
1.	Select					

Add Day

Save

Clear

Cancel

b) Attendance Discrepancy

This option in RELISYS HRM allows the employees to settle the discrepancies raised by the system after matching actual attendance data with configured shifts.

Attendance Discrepancy

Dashboard > Attendance Discrepancy

2 JUN 2021 2022

Add/Edit Attendance Discrepancy

Attendance Date

Discrepancy

-- Select One --

*Actual Discrepancy

-- Select One --

*Reason

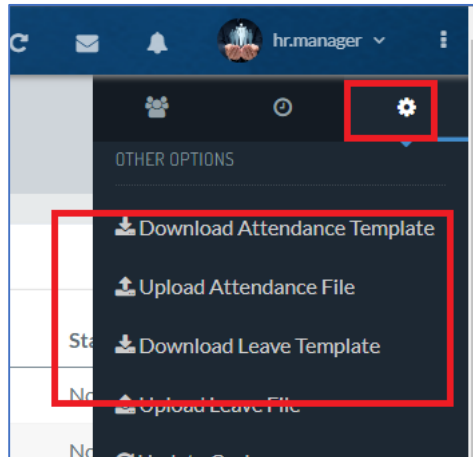
Enter your Reason

Attendance Discrepancy Listing

Date	Time In - Time Out	Apply Date	Discrepancy	Status	Actions
1/6/22	00:00 - 00:00		Absent	Not Applied	
31/5/22	00:00 - 00:00		Absent	Not Applied	
30/5/22	00:00 - 00:00		Absent	Not Applied	
28/5/22	00:00 - 00:00		Absent	Not Applied	
27/5/22	00:00 - 00:00		Absent	Not Applied	
26/5/22	00:00 - 00:00		Absent	Not Applied	

c) Attendance / Leave Upload Option

For the employees, who cannot mark the attendance on machines or machines are not available, RELISYS HRM allows to upload attendance in bulk for such employees. HR needs to identify such employees in profiles, and system will generate excel template for such employees.



d) Attendance for Executive Employees or Where Exemption is required

RELISYS HRM allows to turn on auto attendance feature against specific employees, in this case, system will not generate any discrepancy and populates the attendance automatically.

e) Gazetted Holidays

RELISYS allows user to define Gazetted holidays for a specific financial year.

Add/Edit Gazetted Holidays			
*Financial Year		2021-2022	
Sr. No.	Holiday Name	Date	Action
1.	Eid Ul Adha Day 1	20/07/2021	
2.	Eid Ul Adha Day 1	21/07/2021	
3.			

6) Leave Management

a) Leave Policy

RELISYS HRM module allows to configure multiple leave policies covering Annual Leaves, Casual Leaves, and Medical leaves etc. Separate Leave policy for Male and Female staff can also be configured to cover the specific needs.

Policy Name

Leave Policy For Male Employee

Active ☒

Sr#	Leave Type	Quantity	Service	Min Leaves Allowed	Max Collective Leave		Setting	Actions
1.	Annual Leave	14	1	1.00	28.00	<input checked="" type="checkbox"/> Permanent <input type="checkbox"/> Contractual	<input checked="" type="checkbox"/> Sandwich <input checked="" type="checkbox"/> After Probation <input checked="" type="checkbox"/> Encashable <input checked="" type="checkbox"/> Laps <input type="checkbox"/> Un Paid	
2.	Casual Leave	10	0	.50	3.00	<input checked="" type="checkbox"/> Permanent <input checked="" type="checkbox"/> Contractual	<input checked="" type="checkbox"/> Sandwich <input type="checkbox"/> After Probation <input type="checkbox"/> Encashable <input checked="" type="checkbox"/> Laps <input type="checkbox"/> Un Paid	

Add New

b) Apply Leave and Approval Workflow

Employees can apply leave from their logins via web application or mobile app. System will follow the configured workflow for leave approval. Employee can check the status of application any time from the listings.

Leave Application

Leave Type

--Select One--

Reason for leave

Reason for leave

Full day leave

☒

From Date

dd/mm/yyyy

To Date

dd/mm/yyyy

Save

Reset

Cancel

Leave Application Listing

Employee Name	Type	Date Range	No. of Leaves	Apply Date	Status	Actions
---------------	------	------------	---------------	------------	--------	---------

Sample leave balance report:

Leave Balance listing										✕	
Sr. #	Type	Quantity	Available	Accrued	Availed	Late Deductions	Pending	Balance	Year Balance		
1.	Casual Leave	10.00	10.00	0.00	0.00	0	0.00	10.00	10.00		
2.	Sick Leave	8.00	8.00	0.00	0.00	0	0.00	8.00	8.00		
3.	Annual Leave	14.00	14.00	28.00	0.00	0	0.00	42.00	42.00		

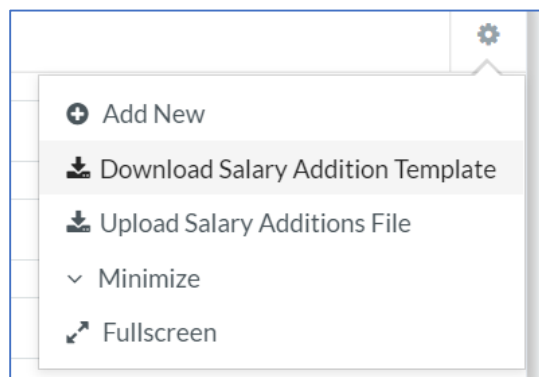
Close

7) Payroll

a) Salary Additions

RELISYS supports to configure multiple variable bonuses in salary e.g. Sale Bonus etc. User can add salary bonuses via salary addition form. It supports multiple entries at a time and excel file upload as well, in case you want to upload multiple records at a time.

Add/Edit Salary Additions										⚙													
* Division	-- Select One --			Department	-- Select One --			* Addition Head	-- Select One --														
* Employee	-- Select One --			* Amount	Enter Amount																		
* Month	-- Select One --																						
Save Reset Cancel																							



Listing view:

Search Salary Additions

Division

-- Select One --

Department

-- Select One --

Month

-- Select One --

Addition Head

-- Select One --

Name

Name

Employee Number

Code

Search

Reset

Cancel

Salary Additions Listing

Employee Name	Division	Department	Month	Addition head	Amount	Status	Actions
---------------	----------	------------	-------	---------------	--------	--------	---------

b) Payroll:

RELISYS allows to generate payroll with single click. User will be able to view the division wise payroll. Multiple reports are there as well, which covers different reporting angles.

Payroll

Dashboard

Payroll

Payroll

Financial Year:

2021-2022

Division:

Faisalabad-Air Export

Month:

January

Search

Salary Posting

Refresh Salary

Sr #	Employee Name	Employee Number	DOJ	Policy Name	Basic Salary	Breakup Total	OverTime	Trip Inaam ...
------	---------------	-----------------	-----	-------------	--------------	---------------	----------	----------------

c) Reimbursements

Employees can request reimbursement of expenses from their respective logins as well. Request will follow the configured workflow and once approved, it will become the part of payroll.

Reimbursement

*Division

-- Select One --

*Month

--Select One--

*Department

-- Select One --

*Date

dd/mm/yyyy

*Employee

-- Select One --

*Type of Expense

--Select One--

*Amount

Enter Amount

*Comments

Comments

Attach Bill

Select file

Save

Reset

Cancel

d) Increments

HR can post the increments for employees via using Increments option.

Increment

*Division

--Select One--

*From Date

dd/mm/yyyy

*Department

--Select One--

Comments

Comments

Employee

--Select One--

*Disburse Month

--Select One--

Percentage

Enter Percentage

Action

Code

Employee Name

Division

Department

Designation

Breakup Policy

Basic Pay

Breakup Amount

New Breakup Amount

Effective Date

Increment

New Salary

Save

Reset

Cancel

View to search existing increments:

Search Increment

Division

-- Any --

Department

-- Any --

Designation

-- Any --

CNIC

Name

Name

Employee Number

Code

Search

Reset

Cancel

Increment/Promotion Listing

Division

Department

Employee

Increment

Date

Salary

Employee Number

Status

Actions

e) Income Tax Withholding Slabs

RELISYS allows to define financial year wise income tax withholding slabs. RELISYS will deduct the withholding income tax automatically as per annual taxable salary.

Add/Edit Income Tax Slab

* Financial Year

2021-2022

Sr. No.	Income From	Income To	Rate of Tax	Addition	Action
1.	.00	600000.00	.00	.00	✕
2.	600001.00	1200000.00	5.00	.00	✕
3.	1200001.00	1800000.00	10.00	30000.00	✕
4.	1800001.00	2500000.00	15.00	90000.00	✕
5.	2500001.00	3500000.00	17.50	195000.00	✕
6.	3500001.00	5000000.00	20.00	370000.00	✕
7.	5000001.00	8000000.00	22.50	670000.00	✕

f) Loan

RELISYS allows employees to post Loan request from there respective logins. Request will follow the configured workflow, once approved, system will generate the loan deduction schedule and deduction will be made in upcoming months accordingly.

Add/Edit Loan

*Division

-- Select One --

Department

-- Select One --

*Employee

-- Select One --

*Loan Type

-- Select One --

*Amount

Enter Loan Amount

*No. of installment

Enter No of Installment

*Deduction Start Date

dd/mm/yyyy

Save

Reset

Cancel

User can search the existing loan entries from respective logins, system provided information about remaining balance as well:

Search Loan

Division

-- Any --

Designation

-- Any --

Name

Name

Department

-- Any --

CNIC

#####

Employee Number

Code

Search

Reset

Cancel

Loan Listing

Division	Department	Employee Name	Loan Amount	Balance Amount	No. of installment	Balance installment	Deduction Start Date	Loan Type	Status	Actions
----------	------------	---------------	-------------	----------------	--------------------	---------------------	----------------------	-----------	--------	---------

g) Salary Deduction

RELISYS allows authorized users to post salary deduction as well. Salary will be deducted accordingly.

Add/Edit Salary Deduction

*Division

-- Select One --

Department

-- Select One --

*Month

-- Select One --

*Deduction head

-- Select One --

*Employee

-- Select One --

*Amount

Enter Amount

Save

Reset

Cancel

RELISYS allows user to define multiple salary breakup policies. Once policies are defined, HR can attach the policies with specific employees. And system will generate the payroll accordingly.

RELISYS allows user to define multiple salary breakup policies. Once policies are defined, HR can attach the policies with specific employees. And system will generate the payroll accordingly.

Add/Edit Salary Breakup Policy

*Policy Name

Enter Policy Name

☐ Active

Sr. No.	Name	Amount	Action
1.	<div>--Select One--</div>	<div>Enter Amount</div>	✕

Save

Clear

Cancel

Add New

RELISYS allows authorized users to post tax rebates as well for employees. Once tax rebate is approved, system will adjust the annual tax of employee accordingly.

RELISYS allows authorized users to post tax rebates as well for employees. Once tax rebate is approved, system will adjust the annual tax of employee accordingly.

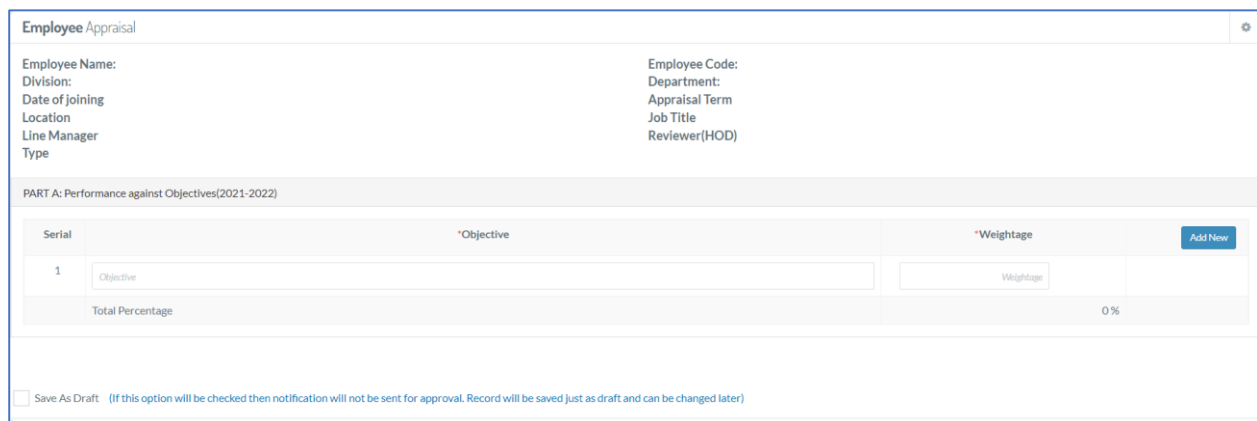
[illegible][illegible]

9) Performance Appraisal

a) Dynamic Appraisal Form with Associated workflow

RELISYS HRM module facilitates performance appraisal process of organization with a dynamic appraisal form and associated configurable approval workflow. Employee will be able to define the objectives for upcoming financial period; one form is submitted it will follow the configured approval workflow. Approving authority will be able to return the form back to the employee, with remarks, in case of any objection or further clarification is required.

Once approved, system will save the objectives, and during performance appraisal, employee can mention the progress against each point, and objectives can be defined for upcoming appraisal period.



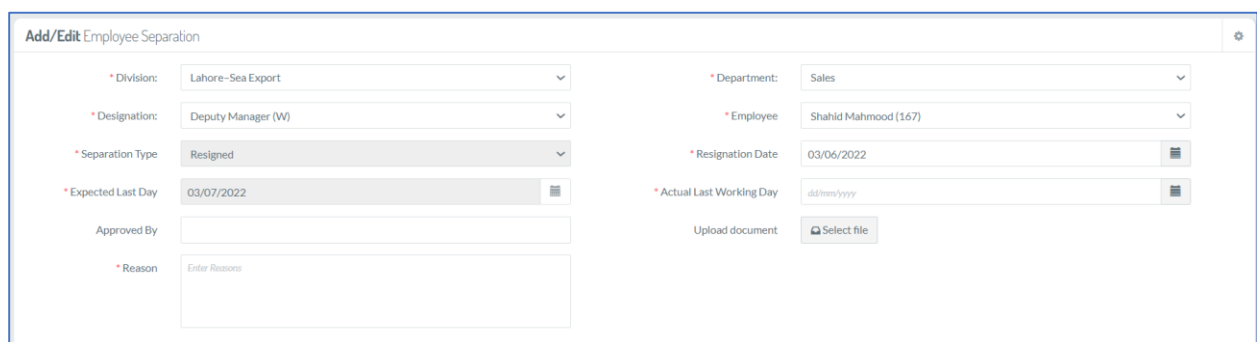
The screenshot shows the 'Employee Appraisal' form. It includes fields for Employee Name, Division, Date of joining, Location, Line Manager, Type, Employee Code, Department, Appraisal Term, Job Title, and Reviewer(HOD). Below these is 'PART A: Performance against Objectives(2021-2022)'. This section contains a table with columns for Serial, Objective, and Weightage. A table row shows '1' in the Serial column, an input field for 'Objective', and an input field for 'Weightage'. A 'Total Percentage' row shows '0 %'. An 'Add New' button is in the top right of the table. At the bottom, there is a checkbox for 'Save As Draft' with a note: '(If this option will be checked then notification will not be sent for approval. Record will be saved just as draft and can be changed later)'.

Serial	*Objective	*Weightage
1	<input type="text" value="Objective"/>	<input type="text" value="Weightage"/>
Total Percentage		0 %

10) Employee Separation

a) Submit Resignation

Employee can submit the resignation form personal workspace. Once resign is submitted system will follow the configured workflow; once resigned in approved, system will exclude the employee from the relevant or effected last month's payroll.



The screenshot shows the 'Add/Edit Employee Separation' form. It includes fields for Division (Lahore-Sea Export), Designation (Deputy Manager (W)), Separation Type (Resigned), Expected Last Day (03/07/2022), Department (Sales), Employee (Shahid Mahmood (167)), Resignation Date (03/06/2022), and Actual Last Working Day (dd/mm/yyyy). There is an 'Approved By' field and a 'Reason' field with a placeholder 'Enter Reasons'. An 'Upload document' section has a 'Select file' button.

b) Exit Interview

Resignation form in RELISYS HRM module has built in form for exit interview as well. Once submitted by the employee, system will keep the record for future reporting.

Please tick mark the relevant answer and where required write legibly.

* 1. Please indicate reason(s) below for leaving the company?

--Select One--

2. The Job Itself

	Agree	Neutral	Disagree
* Job was interesting and challenging	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* There were sufficient opportunities for advancement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Workload was manageable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Sufficient resources and staff were available	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Your colleagues listened and appreciated your suggestions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Your skills were effectively used	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Overall Satisfaction & Enjoyment in your current position.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What do you think can be improved about the job?

What do you think can be improved about the job

3. The Company

	Agree	Neutral	Disagree
* Was a good and positive environment to work in Raaziq.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Had adequate equipment to do the work.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Got on well with other staff within the company	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

c) Final Clearance and settlement

Designated HR personnel can search the existing resignations from the listings, system shows the status against all the resignation, e.g. resignation submitted and pending for approval, resignation submitted and approved, resignation submitted, approved, and final settlement status.

Search Employee Separation

Division: --All-- Department: --All--

Designation: --All-- Status: -- Any --

Employee Number: Code Last Working Day: dd/mm/yyyy

Name: Name

Search Reset Cancel

Employee Separation Listing

Employee	Separation Type	Resignation Date	Last Working Day	Separation Status	Clearance Status	Final Settlement Status	Actions
	Resigned	May 26, 2022	May 26, 2022	Pending	Not Initiated	Not Initiated	
	Resigned	May 24, 2022	May 24, 2022	Approved	Approved	Not Initiated	
	Resigned	May 19, 2022	May 02, 2022	Approved	Approved	Not Initiated	
	Terminated	April 25, 2022	May 25, 2022	Approved	Approved	Not Initiated	
	Resigned	May 18, 2022	May 25, 2022	Approved	Approved	Not Initiated	
	Resigned	April 30, 2022	April 30, 2022	Approved	Approved	Not Initiated	

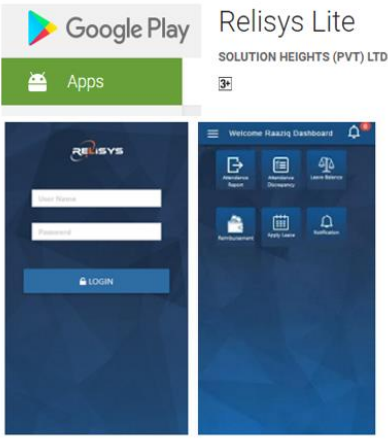
In order to initiate final settlement, click settings option against qualified resignation records and initiate final clearance and after that user will be to initiate final settlement.


In the both cases system will follow the configured workflow and all relevant stakeholders will be required to approve the workflow with relevant comments / inputs.

11) Mobile App


RELISYS Mobile app is readily available on the Google Play Store. User can download the mobile app to perform the following HR related functions.

- ✓ Marking Attendance and applying for discrepancy
- ✓ Leave Application
- ✓ Viewing status of pending / approved workflows
- ✓ Geographic tagging
- ✓ Relevant reports
- ✓ Approving authorities can process the pending workflows from mobile app as well.







Approvals / Notifications




Leave Management



Call / Meeting Management



Google Maps Support



Available on Google Play Store

12) HR Analytics

RELISYS HRM has built in HR analytics dashboards as well. It allows user to view the drill down analytic reports which are helpful in analyzing the data, and trends for future decision making.



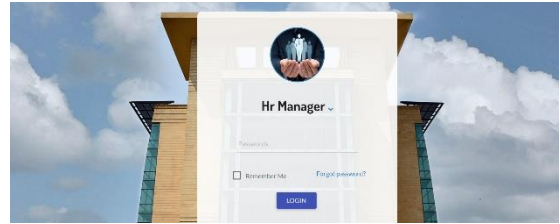
13) HRM Reports

RELISYS HRM has built in reports to cover all the reporting areas. Reports are included:

- ❖ Attendance Reports:
 - Attendance Register
 - Attendance Discrepancies
 - Attendance Status
- ❖ Employee Related Reports
 - Increments
 - Head Count
 - Salary Slip
 - Payroll
 - Health Insurance related reports
 - Employee Separation
- ❖ General Reports
 - Company Hierarchy
 - Requisitions
 - New Hiring
- ❖ Compliance
 - Income Tax withholding report for Tax department
 - EOBI payable report
 - Health Insurance data for Health Insurance provider

14) Why to Choose RELISYS CRM?

RELISYS CRM allows business to manage relationship with the customers and potential customers effectively. It gives more visibility in the sales process and equips sale team to perform routine duties effortlessly.



a) Automate your workflows

RELISYS CRM allows to automate current workflow of lead association. Which gives sales team more time for productive tasks, and they will be able to close more sales effectively.

b) Data driven decision making

RELISYS CRM allows you to make data driven decisions which can shape your organization future. It allows to find the elements which are directly associated with sales. And focusing on these elements, allows business to achieve sales targets easily and save precious resources.

c) Covering complete customer cycle

RELISYS CRM covers complete sales funnel. You can define different stages of conversion as per your business requirements, e.g. Lead, Opportunity, Qualified Opportunity, and Customer.

d) Revenue In Pipeline

RELISYS CRM allows you to define potential revenue against each lead. And you will be able to see the estimated revenue in each sales funnel stage. Which will be helpful in making decision regarding revenue forecast.

e) Web based application

RELISYS CRM Module is web-based application, which can be accessed easily from anywhere. You just need a stable internet connection and browser to access your login with all configured authorities.

f) Mobile App:

RELISYS CRM mobile app enables sales team to plan activities easily. RELISYS mobile app is readily available on Google play store.



Customer Relationship Management

Why to Choose RELISYS CRM?

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RELISYS CRM Module is web-based application, which can be accessed easily from anywhere. You just need a stable internet connection and browser to access your login with all configured authorities.



Manage Lead

Create New Lead

RELISYS CRM allows you to create a new lead with distinctive name and assigning Customer in Entity type. System will require further information on later stages e.g. Due Diligence, Quotation sharing, and Opening a new job.



Support Customer Registration Desk

In order to ensure standardization, RELISYS CRM allows to give access (through user management) to designating personnel. Who will be responsible for approving the registration for Leads after reviewing the required information.



Central Entity Repository

RELISYS CRM allows to maintain a central entity repository for the whole organization, which prevents data duplication and business can ensure consistency. It allows to attach different types with entity and system requires different information as per entity type assigned.



Configurable Approval Workflow

For lead registration, you can define a customized approval workflow. RELISYS CRM will follow the configured workflow and route the lead registration request accordingly. It maintains complete history of approval workflow as well.



Functions



Configurable Approval Workflow



Customer Management KPT's



Integration with Operations module



Dashboard and Reporting



KPT's



Due Diligence



Quotations



Geo tagging

Lead Conversion Lifecycle

Lead Association

Once lead is approved and available in system, sales person can request association of that lead by providing information e.g. potential gross profit and target gross profit.

Activity Planning

Once customer is associated, relevant sales person can plan the activities with lead. Calendar has been provided on the dashboard, which allows to plan activities easily.

Credit Control

RELISYS CRM allows you to set limit for credit for the leads / customers. Sales person can request Credit Limit from login after providing values for Credit Days and Credit Limit. This request will follow the set approving hierarchy and after approval sales person will be notified and approved limit will be available to view from his login.

Add Quotation

Sales person can add quotation after selecting the relevant fields and providing buying and selling. After saving the quotation, RELISYS CRM allows to download PDF in multiple formats as per customer requirements.

Customer Consolidated View

RELISYS CRM allows to view all the relevant information regarding customer at single place. Sales person can perform all the required actions from a single interface.

Due Diligence

RELISYS CRM allows to take approval from due diligence or security department before proceeding with a lead. You can define different parameters on which system will take approval from nominated or authorized personnel and after approval sales person will be informed accordingly.



The Enterprise, building 2 , 4th floor
1 km Thokar Niaz baig, Multan Road, Lahore



(042) 111 722 947



<http://app.relisystems.com.pk/>

15) Functions:

- 11. Configurable Approval Workflow
 - 11.1. Setting up KPI's for Sales team
 - 11.2. Associating Customers
 - 11.3. Due Diligence
- 12. Customer Management
 - 12.1. Lead Registration
 - 12.2. Lead conversion cycle
 - 12.3. Sales Funnel
 - 12.4.
- 13. KPI's
 - 13.1. Defining Sales Team KPI's
 - 13.2. Real time KPI's monitoring
- 14. Due Diligence
 - 14.1. Customizable Due Diligence parameters
 - 14.2. System notifications for Due Diligence
- 15. Quotations
 - 15.1. Multiple quotation templates supported
 - 15.2. Support financial module integration
 - 15.3. Estimated Gross Profit
- 16. Integration with Operations module
- 17. Geo tagging
- 18. Dashboard and Reporting

16) Manage Lead

a) Create New Lead

RELISYS CRM allows you to create a new lead with distinctive name and assigning Customer in Entity type. System will require further information on later stages e.g. Due Diligence, Quotation sharing, and Opening a new job.

The 'Add/Edit Entity' form contains the following fields and options:

- Name:** A text input field with a red asterisk indicating it is required.
- Country:** A dropdown menu with the placeholder text '--Select One--'.
- City:** A dropdown menu with the placeholder text '--Select One--'.
- UAN/Phone:** A text input field with the placeholder text 'Enter UAN/Phone'.
- NTN / CNIC:** A text input field with the placeholder text 'Enter NTN / CNIC'.
- Address:** A text input field with the placeholder text 'Enter address'.
- Entity Type:** A dropdown menu with the following options: Shipping Line/Carrier, Consolidator, Customer, Transporter, Break Bulk Agent, Airline, and Vendor.
- Buttons:** 'Save', 'Reset', and 'Cancel' buttons at the bottom left.
- Settings Menu:** A menu on the right side with options: Minimize, Fullscreen, Add Contact Person, Add Bank Branch, Add Party Asset, and Add Resources.

b) Central Entity Repository:

RELISYS CRM allows to maintain a central entity repository for the whole organization, which prevents data duplication and business can ensure consistency. It allows to attach different types with entity and system requires different information as per entity type assigned.

c) Search Existing Leads / Entities

Search screen allows to search existing Leads / Entities, you can add further data and view the information associated with it.

The 'Search Entity' screen includes the following elements:

- Search Fields:** 'Name' (placeholder: 'Enter Name') and 'NTN / CNIC' (placeholder: 'Enter NTN / CNIC').
- Buttons:** 'Search', 'Reset', and 'Cancel' buttons.
- Entity Listing Table:** A table with the following columns: Entity ID, Name, NTN / CNIC, Created On, Status, and Actions.

d) Support Customer Registration Desk:

In order to ensure standardization, RELISYS CRM allows to give access (through user management) to designating personnel. Who will be responsible for approving the registration for Leads after reviewing the required information.

e) Configurable Approval Workflow

For lead registration, you can define a customized approval workflow. RELISYS CRM will follow the configured workflow and route the lead registration request accordingly. It maintains complete history of approval workflow as well.

Approving authority can return the workflow with relevant comments, which will be the part of workflow history.

17) Sales Team Management

a) User Management:

RELISYS CRM allows to create separate roles for the sales team covering Sales Representative, Manager, and HOD. These roles will be able to view the data according to the set hierarchy.

b) Define KPI's

RELISYS CRM allows to define division wise KPI's for the sales team members. We can cover the following elements here:

- i. No. of Calls / meetings per day
- ii. No. of Visits
- iii. No. of Quotation
- iv. Gross Profit Targets

c) Real Time KPI's Monitoring

RELISYS CRM allows to monitor set KPI's for the sales team on real time basis. Reporting authorities can view the progress from there dashboard.

18) Lead Conversion Lifecycle

RELISYS CRM allows to configure lead / customer conversion lifecycle as per business requirements. We can attach certain events, based upon which system automatically changes the stage of lead.

a) Lead Association

Once lead is approved and available in system, sales person can request association of that lead by providing information e.g. potential gross profit and target gross profit.

Once association request is submitted sales manager can approve or decline the association request. This step allows sales manager to allow association of lead with most relevant sales person.

The screenshot shows the 'Add/Edit Associate Customer' form. It contains several fields for customer and lead information:

- Customer Name:** 'AECO EXPORT COMPANY' (with an 'Add Bulk' link).
- *Customer Division:** 'Main Division' (dropdown).
- Division:** (dropdown).
- *Sales Person:** (dropdown).
- *Source of Lead:** '--Select One--' (dropdown).
- Yearly Potential Volume:** 'Potential Volume' (text input) and 'Volume Unit: --Select One--' (dropdown).
- G.P Per Unit:** 'Enter G.P Per Unit' (text input).
- Potential GP:** (text input).
- *Key Contact:** '--Select One--' (dropdown).
- *Product:** '--Select One--' (dropdown).
- Target Volume:** 'Enter Target Volume' (text input) and 'Volume Unit: --Select One--' (dropdown).
- Currency:** 'United States of America, Dollars' (dropdown).
- Target GP:** (text input).
- Key Contact for CCU:** '--Select One--' (dropdown).

At the bottom, there are 'Save', 'Clear', and 'Cancel' buttons.

b) Activity Planning

Once customer is associated, relevant sales person can plan the activities with lead. Calendar has been provided on the dashboard, which allows to plan activities easily.

The screenshot shows the 'Call/Meeting Activity' calendar for June 2022. The calendar is a grid with days of the week (Sun to Sat) and dates. A legend on the left indicates activity types: Call (green square), Meeting (blue square), Daily Obj (purple square), Pending (orange circle), Approved (thumbs up icon), Rejected (thumbs down icon), and Delete (X icon). The calendar shows dates 1 through 30, with a red circle around the number 7 on Tuesday. The calendar is titled 'JUNE 2022' and has navigation arrows for previous and next months.

Click on relevant date on which you want to plan activity (Call or meeting). System will ask for the further information

Add Call/Meeting Activity

Activity
Document
Location
Feedback

*Customer
search a Customer in the list...

*Activity type
Call

*Date from
08/06/2022

*Start Time

Time Zone
Asia/Karachi

Product

Air Freight
Air
Customs
Warehouse
Rail
Transport
Sea

*Priority
☒ High
☐ Low
☐ Moderate

*Agenda
--Select One--

*Date to
08/06/2022

*End Time

Notifications
☐ Email
☐ Popup

Save
Clear
Cancel

And record will be saved:

JUNE 2022						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
<div> <div> <div>Call</div> <div>Meeting</div> <div>Daily Obj</div> <div>Pending</div> </div> <div> <div>Approved</div> <div>Rejected</div> <div>Delete</div> </div> </div>	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	<div> 9:45a ABC ACCESS </div>	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Calendar allows the sales person to plan the day accordingly.

c) Due Diligence

RELISYS CRM allows to take approval from due diligence or security department before proceeding with a lead. You can define different parameters on which system will take approval from nominated or authorized personnel and after approval sales person will be informed accordingly.

d) Credit Control

RELISYS CRM allows you to set limit for credit for the leads / customers. Sales person can request Credit Limit from login after providing values for Credit Days and Credit Limit. This request will follow the set approving hierarchy and after approval sales person will be notified and approved limit will be available to view from his login:

Customer Info

Customer Info

Call/Meeting

Inquiry

Contract

Associate Customer

CCU

SNS

Customer Division: Sea Export

Requested				Recommended		Approved	
* Currency	* Credit Days	* Credit Limit	Expiry Date	Credit Days	Credit Limit	Credit Days	Credit Limit
<div></div>	<div></div>	Requested Credit Li	dd/mm/yyyy <div></div>	-	-	-	-

Save

e) Customer Consolidated View

RELISYS CRM allows to view all the relevant information regarding customer at single place. Sales person can perform all the required actions from a single interface:

Search required customer from listings:

Search Customer

Customer Name

NTN

Status

Country

City

Area

Search

Reset

Cancel

Customer Listing

CustomerID	Name	NTN	Actions
25996	FOODS PRIVATE LIMITED		

Click on the customer name and system will open consolidated view for customer:

Customer Info

Customer Info

Call/Meeting

Inquiry

Contract

Associate Customer

CCU

SNS

* Company Type

--Select One--

Years in Business

--Select One--

Customer ID		Customer Name	FOODS PRIVATE LIMITED
NTN		URL	
STRN			
Description			
Customer Contact			+
Name	Designation	Contact #	
Customer Address			+
Address	Contact #	Email	
Customer Potential	+		

f) Add Inquiry

RELISYS allows to configure multiple products in CRM, and user can define the different product wise requirements.

Sales person will select the inquiry against mentioned product.

Customer Info

Customer Info

Call/Meeting



Inquiry

Contract

Associate Customer

CCU

SNS

Customer Division	Action
Sea Export	
Main Division	

Customer

* Rate Validity date08/07/2022

Cash based☐

Auto Bound☒

Customer DivisionSea Export

Shipper/Consignee/PartySearch Shipper

Air Freight ✕

Air Customs ✕

Transport ✕

*Import / Export:☒ Export ☐ Import

Loading CountryPakistan

* Loading Air PortAlamalqbalInternational

Expected Departuredd/mm/yyyy

* Commodity--Select One--

* Gross weight (Kg)Enter Gross Weight

☒ Air Freight

Discharge Country--Select One--

* Discharge Air PortSelect or search a Air Port in the list...

Expected Arrivald/mm/yyyy

* Commodity Type--Select One--

Chargeable WeightChargeable Weight

g) Add Quotation

Sales person can add quotation after selecting the relevant fields and providing buying and selling. After saving the quotation, RELISYS CRM allows to download PDF in multiple formats as per customer requirements.

Add/Edit Quotation

* Currency
PKR Pakistan, Rupees

* Validity date
08/07/2022

☐ Draft

Customer Division
Sea Export

FreightAir
Transport

Commodity
Air Conditioners
Loading Airport
AlamaIqbalInternational
Discharge Airport
Angads

*Airline	*Currency	*Buying Rate (per KG)	* Selling Rate	* Exchange Rate	Quantity	Total	Add New
Select or search a Airline in the list...	PKR - Pakista	Buying Rate	Quote Rate	Exchange Rate	600.00		

Due Carrier

AirLine	* Charges type	* Charges basis	* Currency	* Buying Rate	* Selling Rate	* Exchange Rate	* Quantity	Total
---------	----------------	-----------------	------------	---------------	----------------	-----------------	------------	-------

Due Agent charges

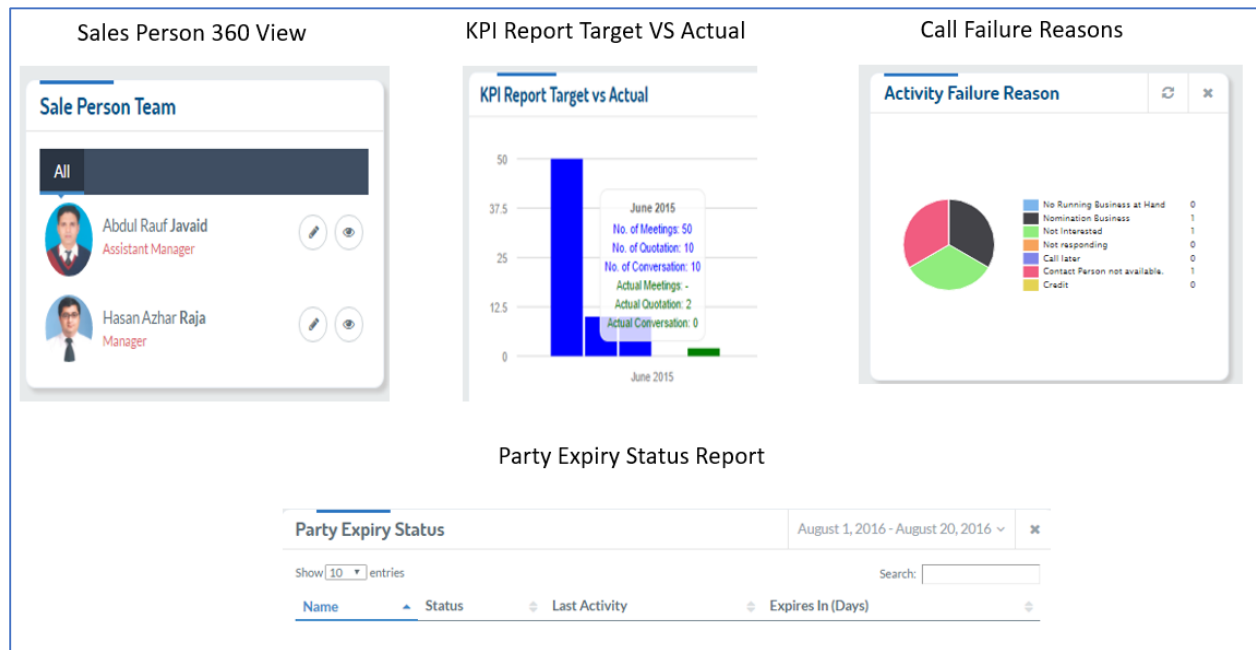
@ Actual	* Charges type	* Charges basis	* Currency	* Buying Rate	* Selling Rate	* Exchange Rate	Tax %	* Quantity	Total	Add Service Charges
----------	----------------	-----------------	------------	---------------	----------------	-----------------	-------	------------	-------	---------------------

Host Cancel

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19) Dashboard



20) CRM Flow

