



# Developing Your Business Solutions

## INTOROCUTION

RELISYS ERP

### Abstract

This document contains an overview to RELISYS ERP.

Solution Heights Team

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## Introduction

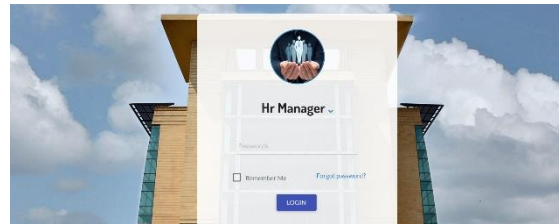
Keeping things organized is a challenge for business. Nowadays businesses are using multiple platforms including spreadsheets, google sheets, online CRM, and other standard modules to manage different aspects; which makes difficult to get consolidated view of business performance, which includes accounting,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

## 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.

## 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.



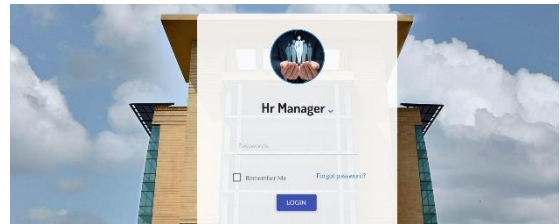
### 3) HRM Reports

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

## 4) 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.



## 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.



### 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.

### 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.



### 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.

## Sales Team Management

### Create New Lead

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.

### 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

## 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.

### 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.

### 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.

### 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 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.

### 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.

## 5) 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
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



## 6) Warehousing

Relisys Warehouse Management System (WMS) is an application suite designed to optimize warehouse operations. Relisys solutions manage the entire warehouse operation cycle in a real-time mode.

Relisys WMS is a leading-edge system capable of generating recommendations on the optimization of the technological operations in a warehouse as well as managing personnel and material handling equipment in order to achieve the highest performance.

The system eliminates the need for paper documentation. All documentation is generated, transmitted, processed, and optimized in the system. Every operation is confirmed and logged into the system by the operator by either scanning a bar code or entering data via the RF terminal keyboard. Therefore, information on product quantity and allocation in the warehouse is always accurate and up-to-date, so any mistakes or exceptions can be noted and immediately corrected.

The objective of Relisys WMS is the automation of the entire warehouse management cycle - from the point that goods are received at the warehouse up to the delivery of customer orders.

The scope of implementations can vary from basic warehouse control (management system based on paper task lists) to a complex, full-scale warehouse management system in real-time mode using a barcode, RF data transmission, and material handling equipment that positions technologies and other automation means depending on the customers' needs.

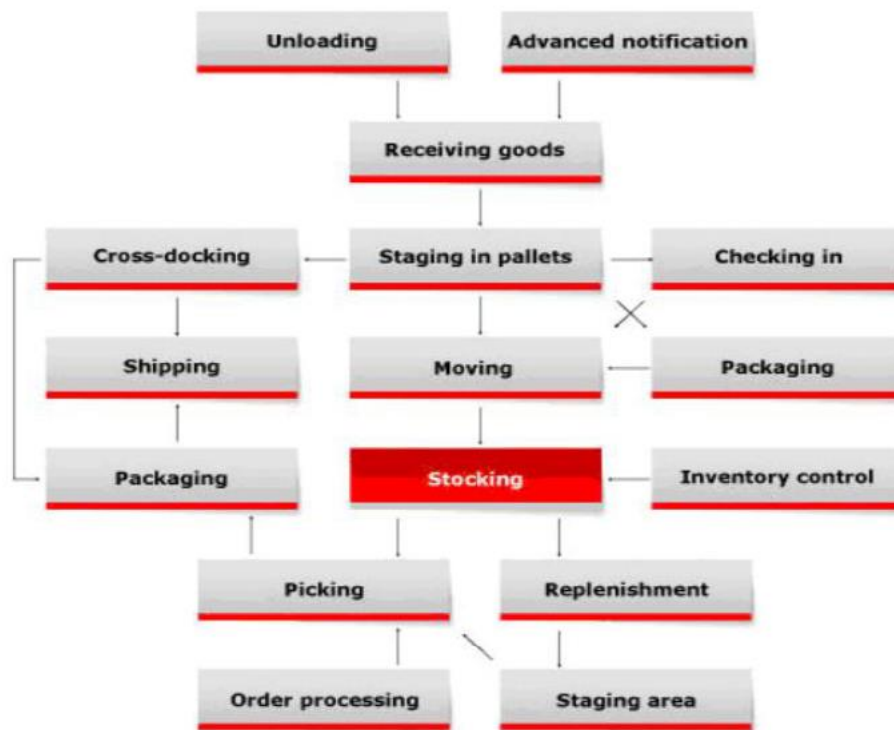
The WMS optimizes the put-away and storage of inventory by dividing the warehouse into designated areas and utilizing space in the most efficient way.

The ability to conduct cycle counting during the regular workday reduces or eliminates the need to shut down operations to conduct a physical inventory count. Relisys WMS allows customers to increase quantitative and stowage data accuracy to 99.9% while reducing the duration of receiving and shipping operations by 2-3 times.

Adaptability is one of the most significant features of Relisys WMS. The system can be configured in order to meet the specific operational and business requirements of the customer.

## WMS prominent Functions

1. Optimization principles
  - 1.1. Automatic identification of loads/identity control
  - 1.2. Warehouse zoning
  - 1.3. Control operations in real-time mode
  - 1.4. Authority levels and privileges control
  - 1.5. Keep a record of any event and action
  - 1.6. System configuration
  - 1.7. Report generation
  - 1.8. Support of RF and bar code equipment
  - 1.9. Integration with ERP system
  - 1.10. Statistics exchange
  - 1.11. Auto email alert
2. Inbound management
  - 2.1. Advanced notification
  - 2.2. Receive the nonstandard, unpacked product and returns
  - 2.3. Cross-docking Operations on products in stock
  - 2.4. Operations on products in stock
  - 2.5. Put-away and inventory storage rules
  - 2.6. Product age and expiration date control
  - 2.7. QC & quarantine
  - 2.8. Inventory management by FIFO, FEFO, LIFO, LEFO
  - 2.9. Inventory by various units of measure
  - 2.10. Stock inventory
  - 2.11. Physical counting
  - 2.12. Cycle counting
3. Order processing
  - 3.1. Order planning
  - 3.2. Goods reservation/backup
  - 3.3. Picking
4. Mobile App



## Standard Reports

1. Inward Cargo Report
2. Approved GRN Report
3. Batch Wise Inward Report
4. Inward Pallet Summary Report
5. Inward Aging Report
6. In and Out Pallet Summary Report
7. In and Out Unit Summary Report
8. Date Wise Stock Receipt Summary Report
9. Dispatch Note Report
10. Dispatch Pallet Detail
11. Dispatch Pallet Movement
12. Dispatch Pallet Summary Report
13. Distributor Wise Dispatch Summary
14. SO Wise Delivery Detail Report
15. SO Wise Pending Delivery Detail Report
16. Order Shipping Summary Report
17. Partial Dispatch Note Report
18. Storage Summary
19. Stock Position Report
20. Location Wise Stock Report
21. Item Finder Report
22. Detail Stock Report
23. Expired Stock Report
24. In hand Inventory Report
25. Cycle Count Report
26. Aging Report
27. Batch Wise In hand Inventory
28. Other customization reports

## 7) Operations

RELISYS Operations module is an integrated part of RELISYS ERP; it is designed to handle all the components of supply chain which covers:

- Transportation
- Custom Clearance
- Sea Freight
- Air Freight

### a) Why to Choose RELISYS Operations Module:

1. Integrated with RELISYS CRM Module. Successful quotations will be available automatically to open jobs.
2. Milestones are there to know the current status of Job
3. KPI's can be monitored via Operations module
4. Real time alerts for Customers
5. Rates are updated from CRM Quotation
6. Option to add on the job expenses
7. Fully integrated with Finance module

### b) Prominent Products:

#### i) Air Freight:

RELISYS Ops module empowers users to manage AIRWAY bill stock of different airlines. It manages buying and selling of these Airway bills so that it can be integrated with finance module. Airway bill stock can be managed at any location; and which can be attached with any relevant job which is opened in RELISYS Ops module. This job will show consolidated view of revenue (From quotation) and expenses (Airway bill and other on the job expenses).

User can also attach different milestones for job tacking and consolidated view of jobs can be presented to management or customer.

#### ii) Sea Freight

In Sea Freight job module empowers users to manage sea freight jobs effectively; it has built in milestones to monitor the job status e.g. Bill of Lading, tentative departure / arrival date, actual dates, relevant Customer relationship officer, etc.

Sea Freight Job information will be shared with Financial module as well for preparing customer bills and vendor payable invoices.

Different milestones can be configured against Import and Export nature of jobs.

LCL and FCL both type of jobs for Sea export and Import can be handled in Sea Freight module.

### iii) Customs

For customs management, it is very important to meet the expected milestones relevant with jobs, your shipment cannot be delayed, be it needs to be shipped on a certain ship or flight. RELISYS ops module allows business user to create effective milestones according to the job requirements.

Alerts for relevant customer clearing agents can also be configured in our system. It supports customer clearance on origin and destination; both can be added in a single job and can be evaluated according to the set milestones.

### iv) Transportation

Transportation moment at origin country and destination country can also be managed in RELISYS ops module. In RELISYS Ops module, different transporters (service providers) can be configured and payables can be automatically populated in the relevant financial module.

RELISYS Ops module is capable of getting tracking data from trackers; and relevant tracking reports can also be shared with stakeholders.

### c) Reports:

1. Job Analysis Report
2. Job Summary Report
3. Standard Tracking Reports
4. Setting KPIS'
5. KPI vs Actual Reports

Col Heatmap

Sum

NoOfShipments

Line

OriginPort

DischargePort

TusCount

GrossWeight

CBM

NoOfShipments

COMODITY

PartyName

COMODITY

Fabrics

Glass Products

Rice

Shoes

Yarn

null

Totals

1.00

1.00

1.00

2.00

1.00

11.00

1.00

2.00

2.00

1.00

1.00

4.00

4.00

4.00

6.00

6.00

2.00

1.00

1.00

3.00

10.00

3.00

3.00

### d) BI Dashboard:

BI Dashboard is built in feature of RELISYS Ops module; business users can view the following real time stats:

1. Number of Jobs
2. Origin / Destination wise Jobs.
3. Total weight or TUES
4. Airline wise / Shipping line wise job analysis
5. Customer wise analysis
6. Financial Analysis



## 8) RELISYS Mobile App

RELISYS Mobile app empowers users to perform routine tasks e.g.:

### a) Approval Workflow

Approving authorities can process the approval workflows from mobile app.

### b) Leaves / Discrepancies

Mobile app allows the employees to apply leaves and settle discrepancies as well.

### c) Entity Management

Sales people can add new leads via mobile app and can plan calls and meetings as well.

**RELISYS**

## 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.

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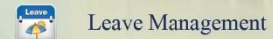
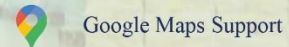
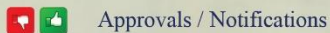
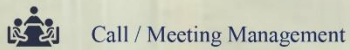
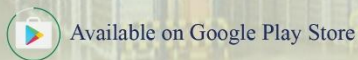


## Get to Know You



- Login
- Notification
- Dashboard
- Live Update
- Attendance
- Leave Application

## Mobile App



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