
# 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:

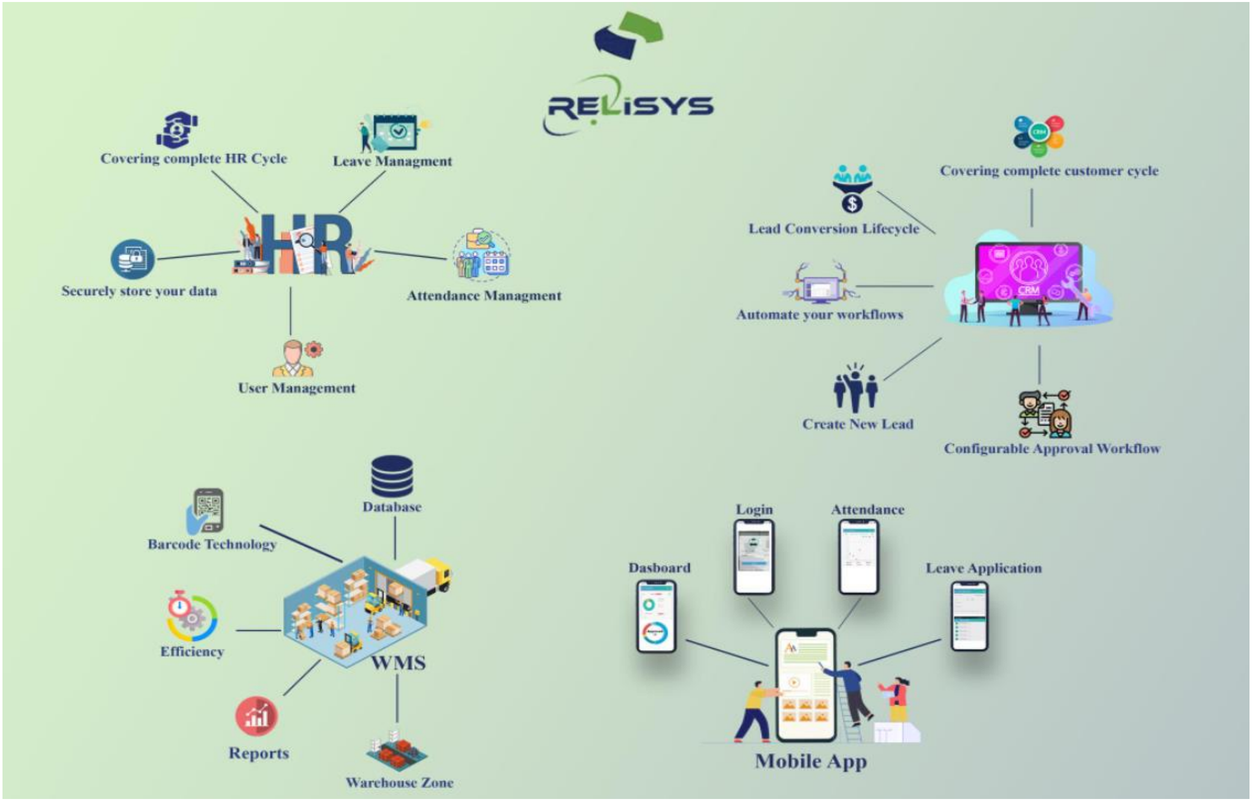
i. One stop shop: RELISYS ERP offers all the required modules under one umbrella; which includes:
   a. Human Resource Management
   b. Customer Relationship Management
   c. Operations Management
   d. Warehousing
   e. Inventory Management
   f. Financial Management

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.




RELISYS

# Mobile App

### Login

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

### Dasboard

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
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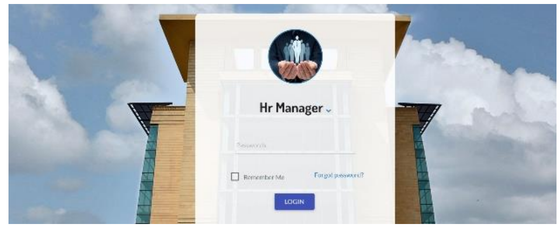
(042) 111 722 947

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 paly 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.

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## 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.

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## 2) Functions:

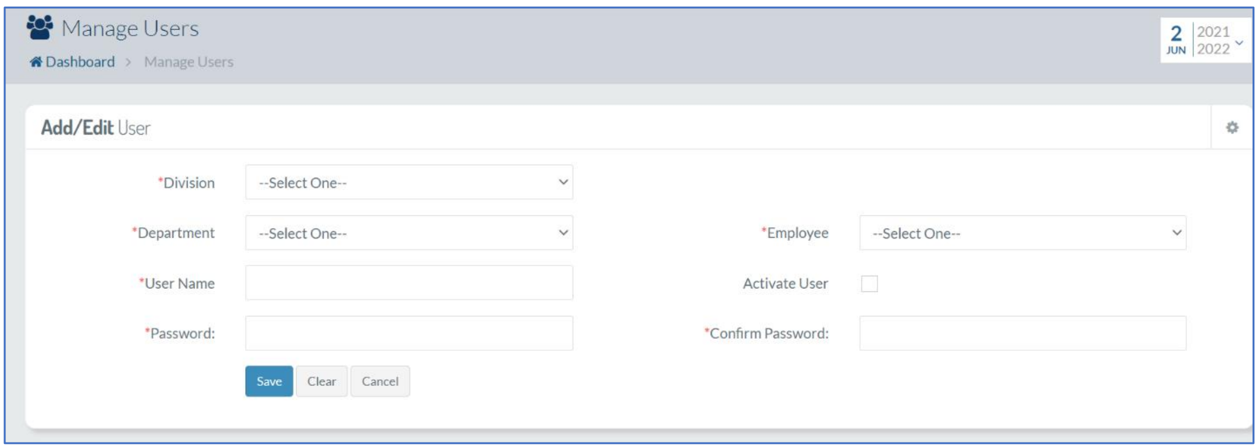
1. User Management
   1.1. Multiple Roles
   1.2. Map Roles with Interfaces
   1.3. Multiple company assignments
   1.4. Profile creations
2. Configurations
   2.1. Define Multiple Companies, divisions, departments, and Locations
   2.2. Define Multiple Job Descriptions
   2.3. Define Multiple Designations
   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

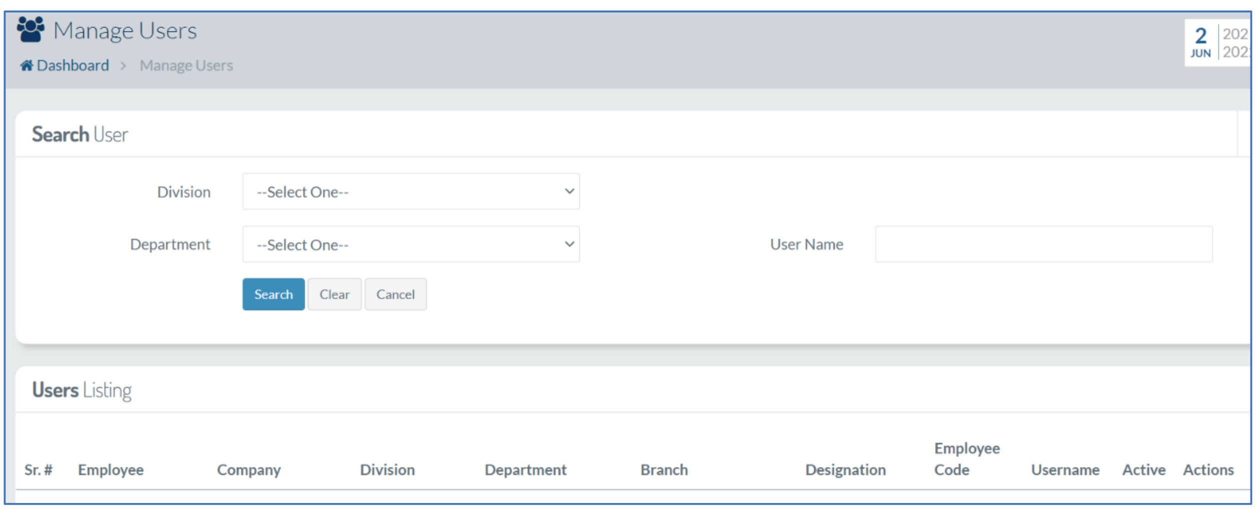
RELISYS user management module enables company to control access to core HR functions, with extensive set of tools to extract and identify data. It allows to define each employees level of access to data, based upon user department and role.

## a) Create and Manage User:

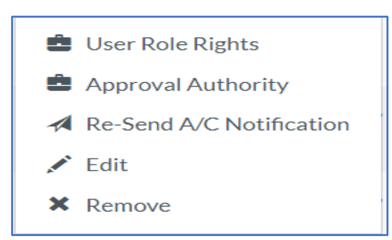
User management module enables HR department to create user id and password for each employee. For creating user, you can search the specific employee and after providing user name and password.




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



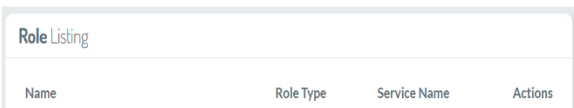

You can assign / update role rights, deactivate user, and assign approving authorities from the above screen as well.

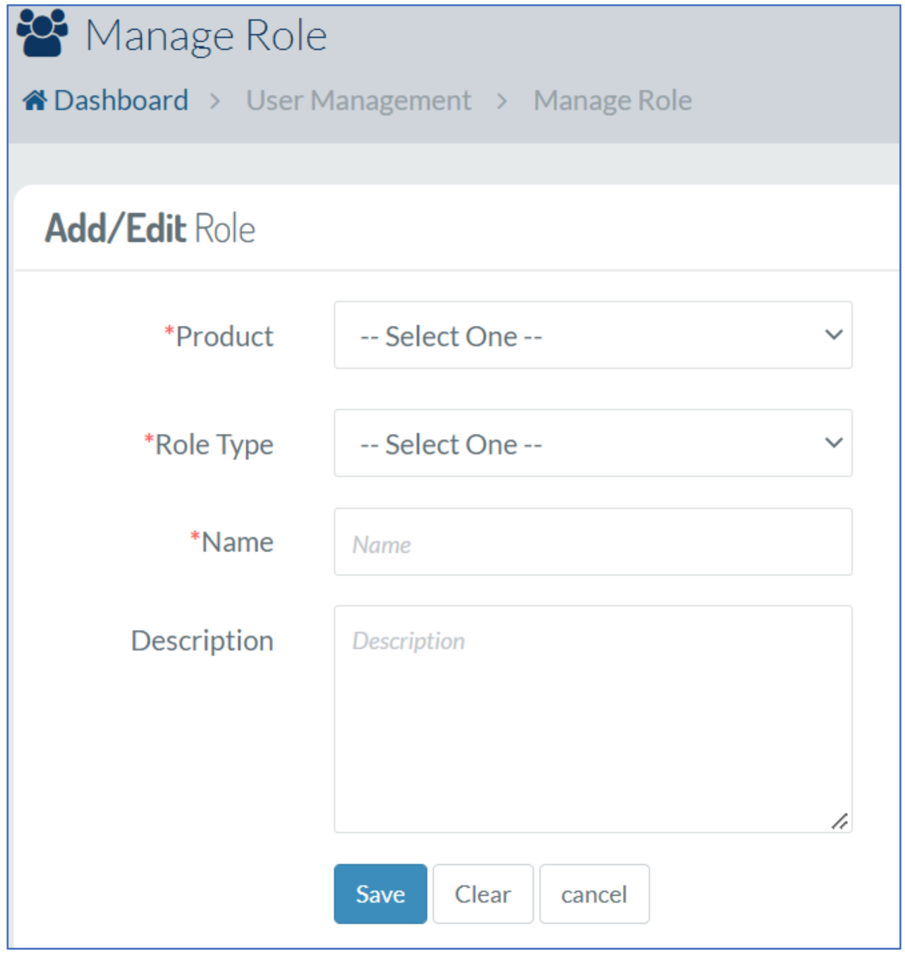


### b) Create and Manage Roles

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

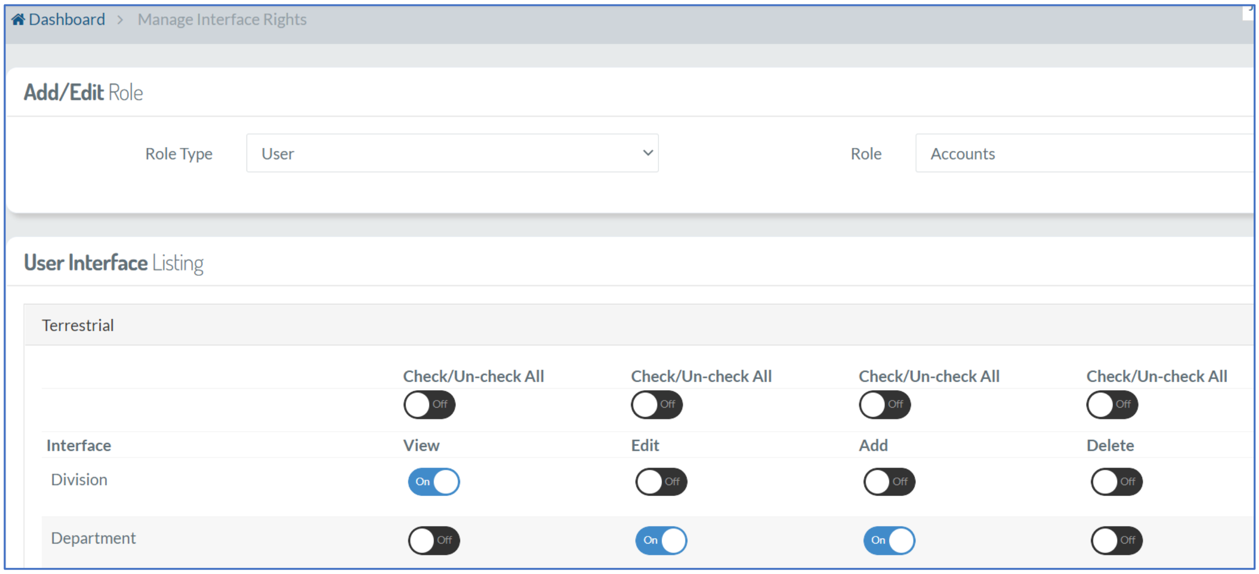
User can search the existing roles as well from the listings, where roles can be updated or deleted as per requirements. However, system will not allow to delete assigned role.



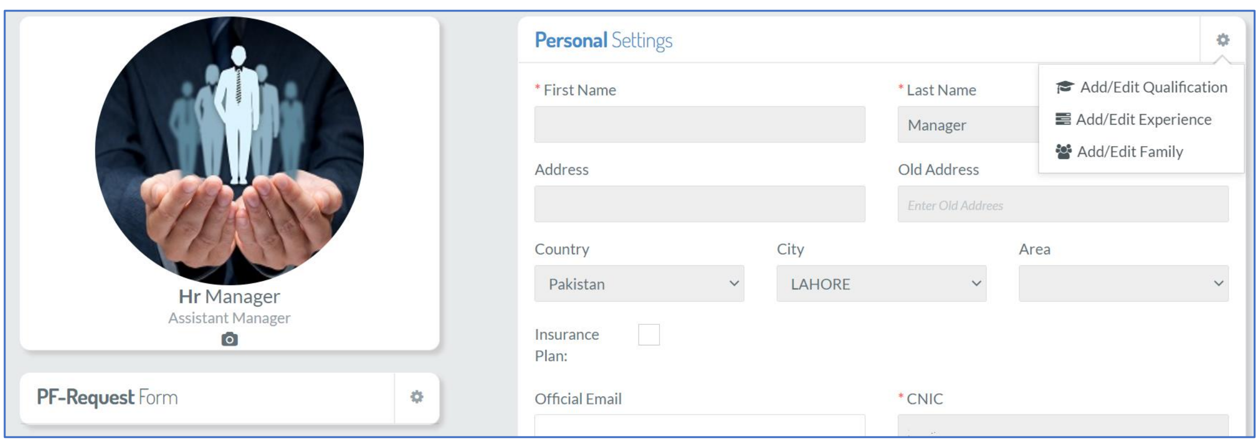
## c) User Interface:

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.



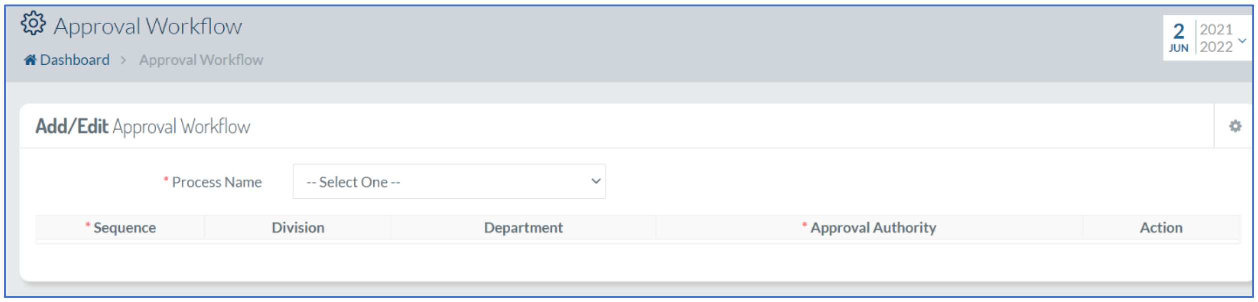

## d) Update Profile

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.

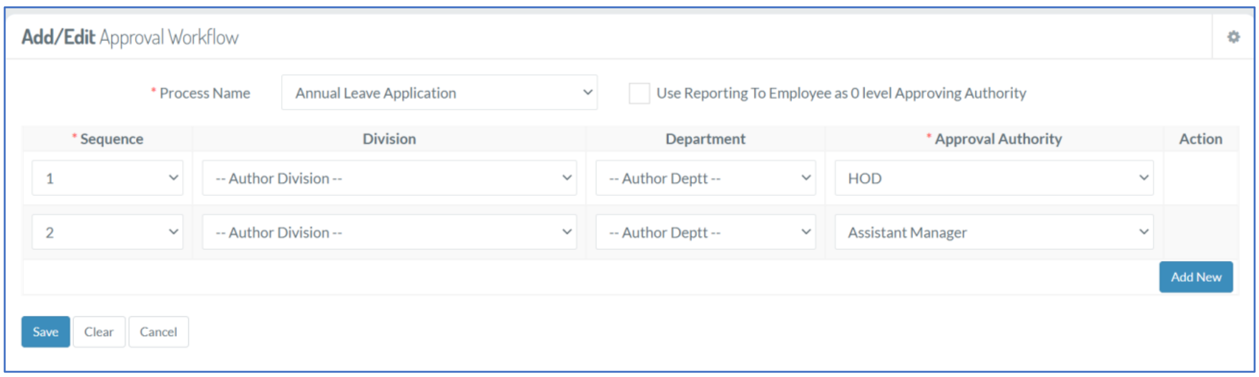


## e) Workflow Management

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




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.

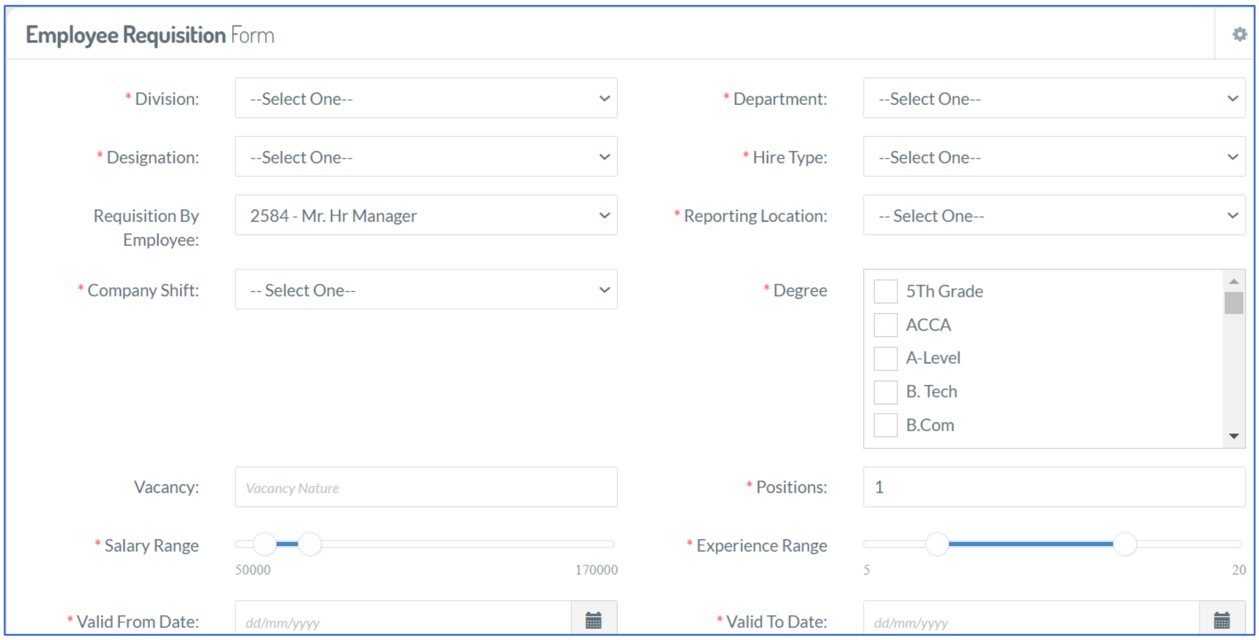


# 4) Employee Management:

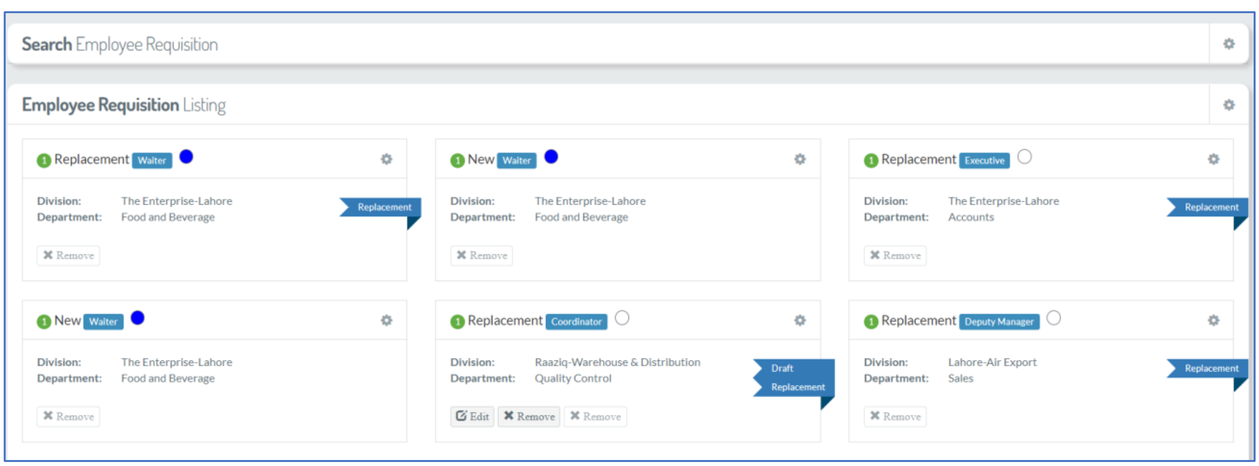
## a) Employee Requisition

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.

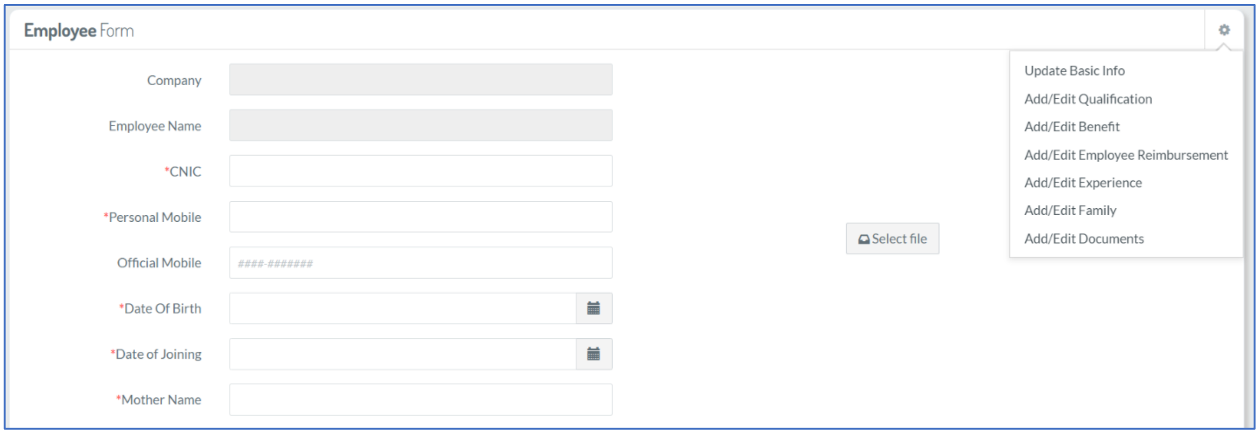



User can search the existing requisitions as well and can create a copy to save data entry

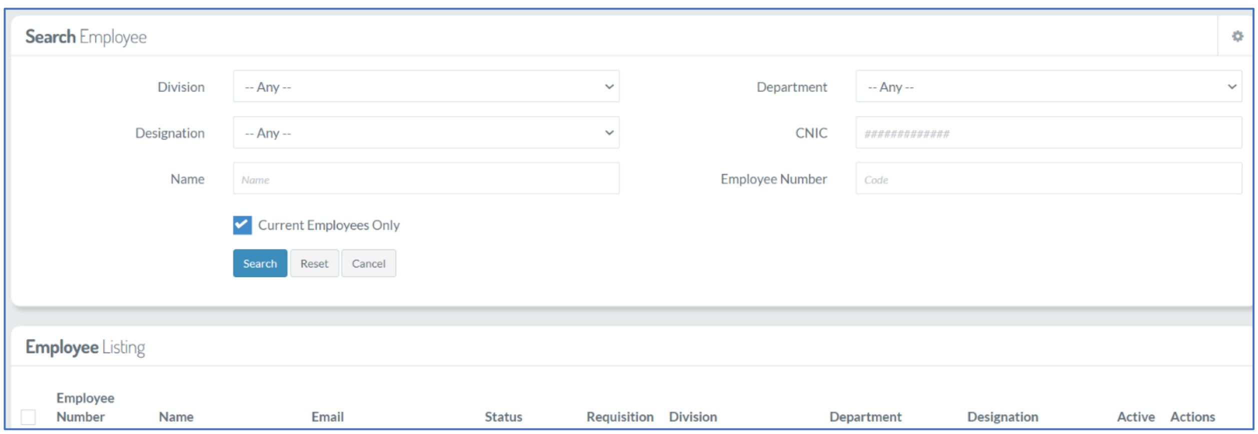


## b) Define Employee

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.

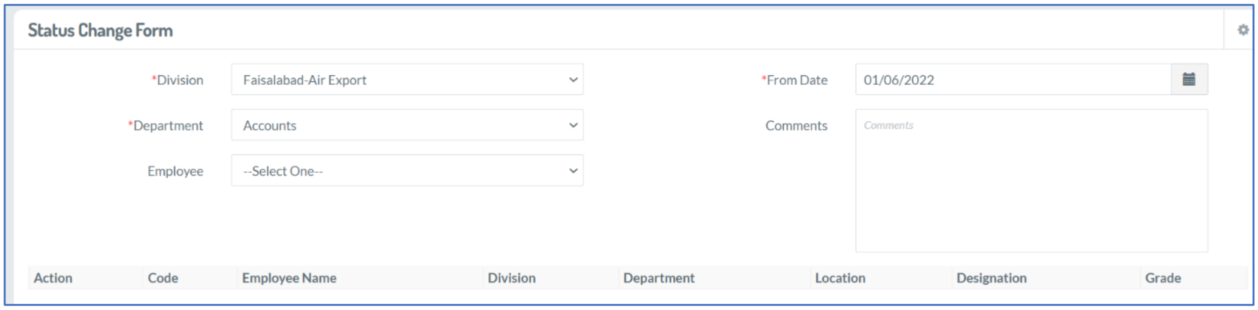



You can search any employee via employee search



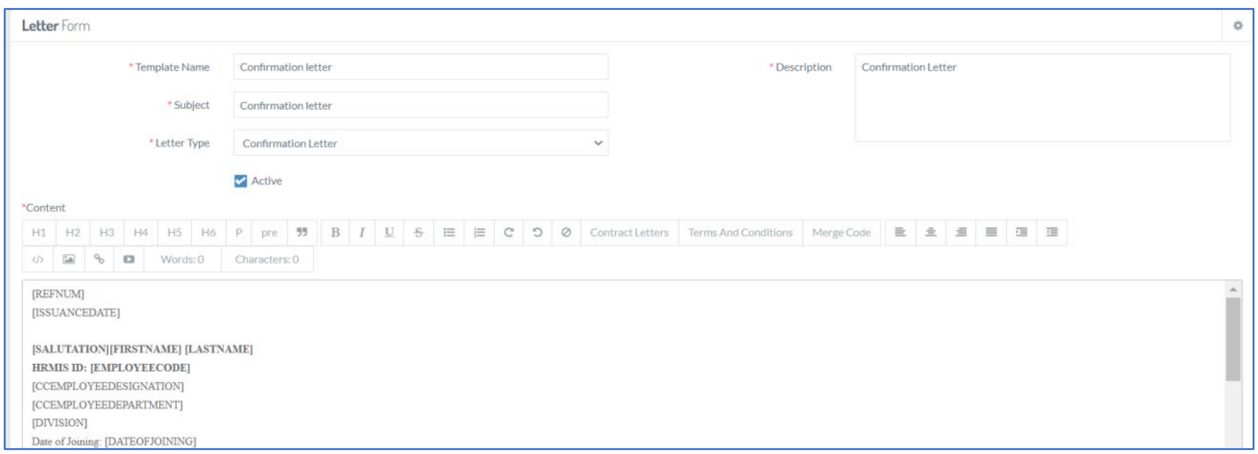
## c) Change Status

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.




## d) Letters

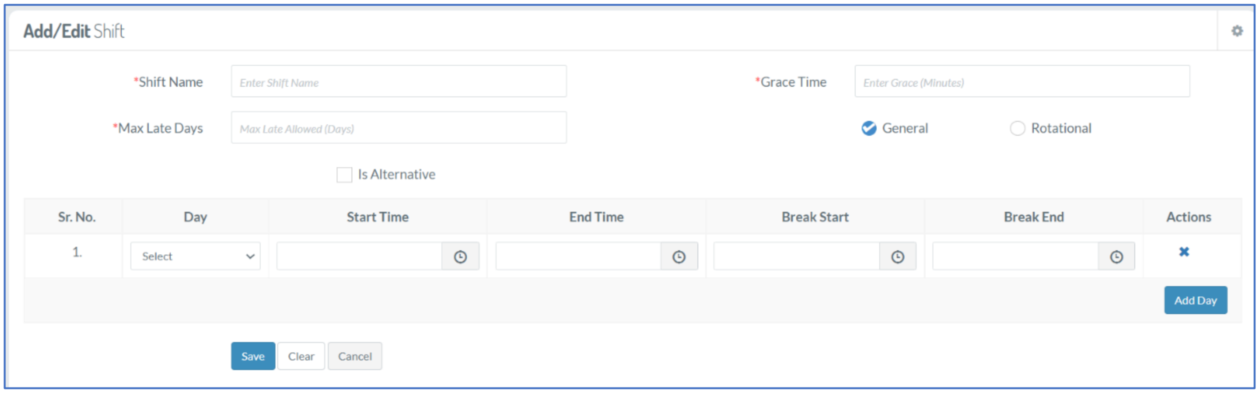
RELISYS HRM allows users to define dynamics letter templates, which system will generate for specific employees and system will automatically update the dynamic mapped fields with specific data of the employee. System maintains the complete log of all the letters issued to employee as well.



# 5) Attendance Management

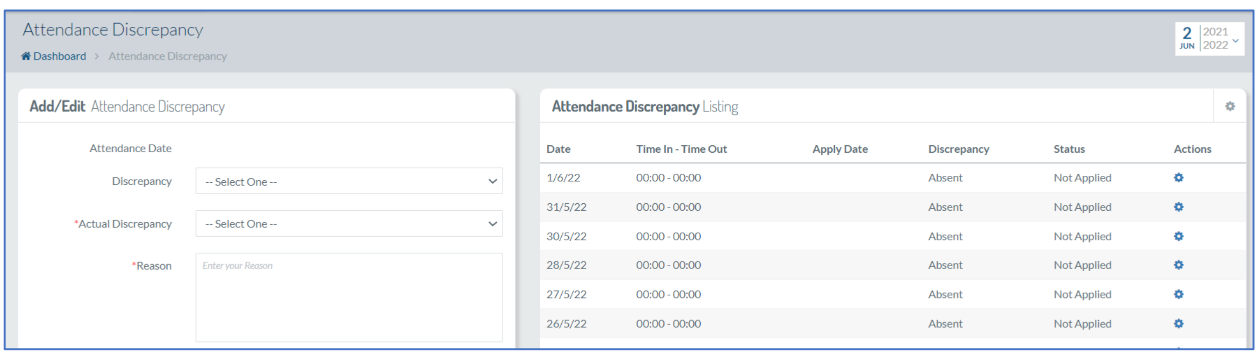
## a) Manage Shifts

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 captures against the saved shift and system will generate the discrepancy accordingly.



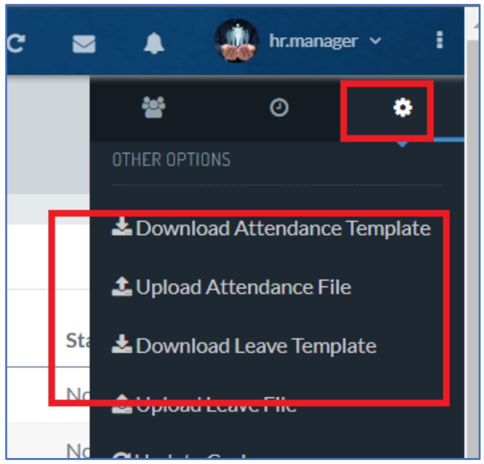

## b) Attendance Discrepancy

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



## 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.

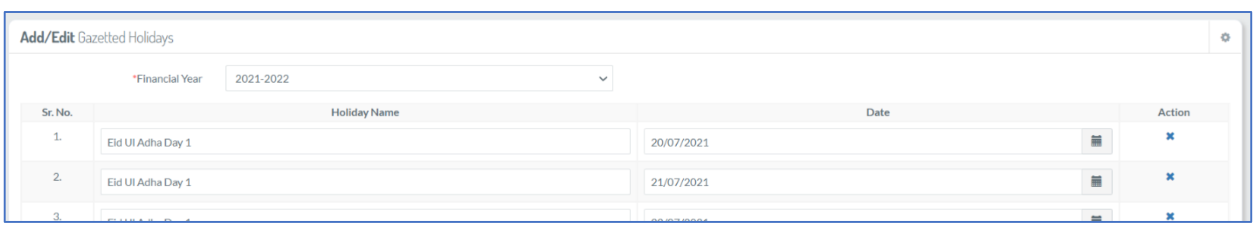



## d) Attendance for Executive Employees or Where Exemption is required

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

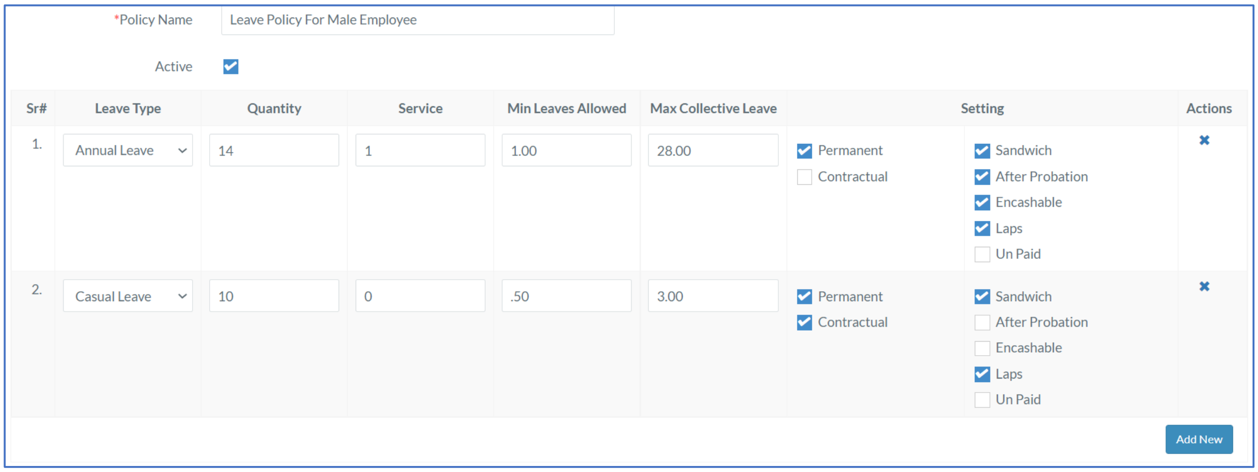
RELISYS allows user to define Gazetted holidays for a specific financial year.



# 6) Leave Management

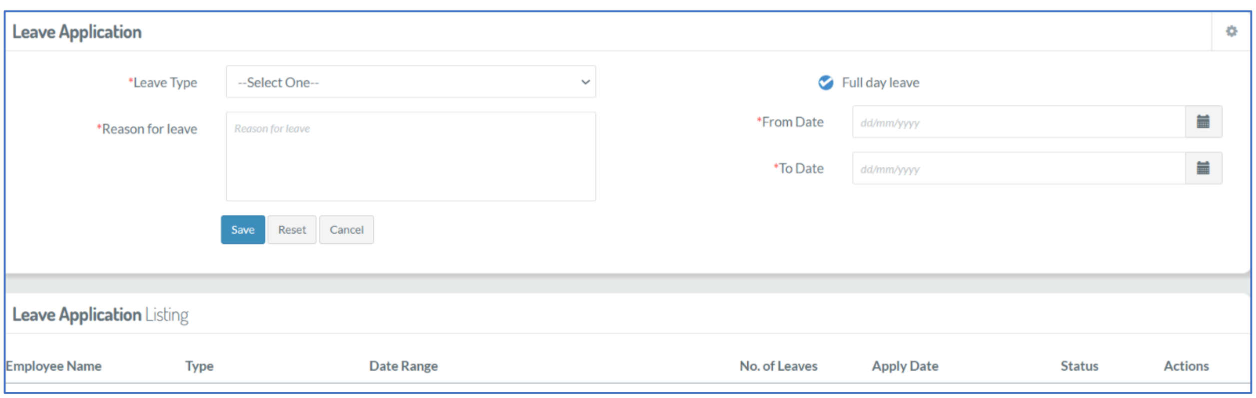
## a) Leave Policy

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.

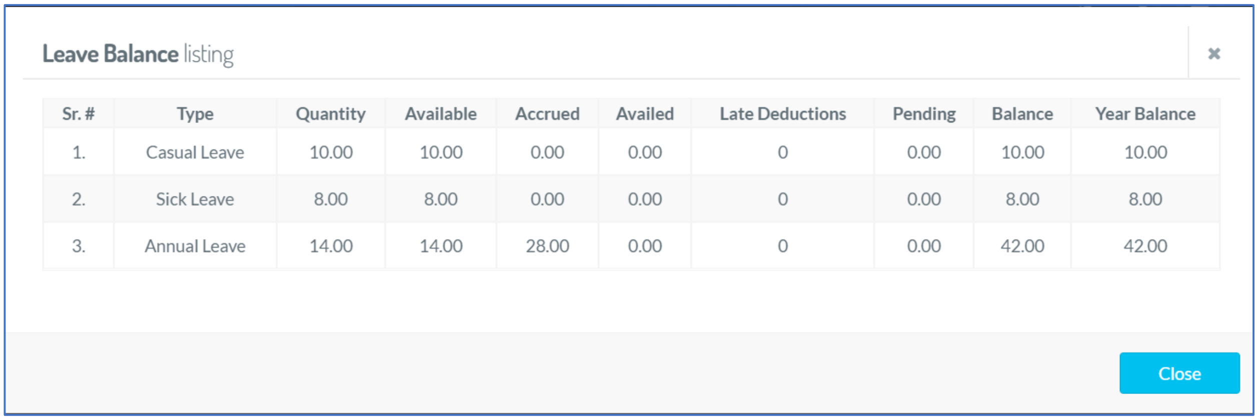



## b) Apply Leave and Approval Workflow

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.



Sample leave balance report:



**Leave Balance** listing

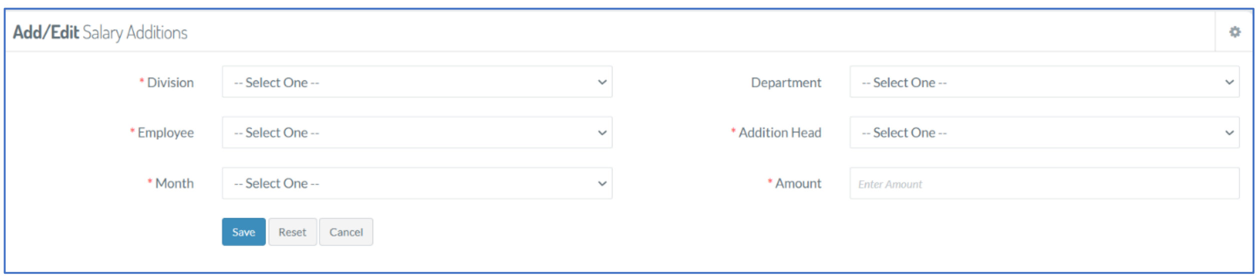
| Sr. # | Type | Quantity | Available | Accrued | Availed | Late Deductions | Pending | Balance | Year Balance |
|---|---|---|---|---|---|---|---|---|---|
| 1. | Casual Leave | 10.00 | 10.00 | 0.00 | 0.00 | 0 | 0.00 | 10.00 | 10.00 |
| 2. | Sick Leave | 8.00 | 8.00 | 0.00 | 0.00 | 0 | 0.00 | 8.00 | 8.00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

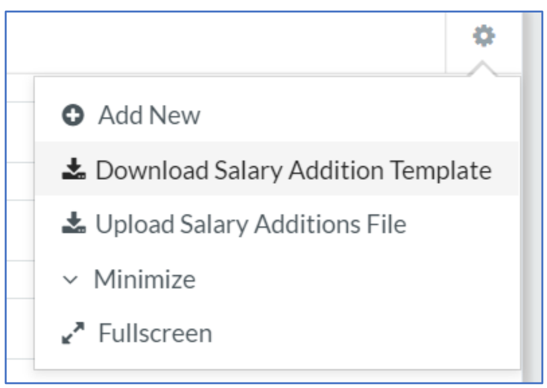
Close

# 7) Payroll

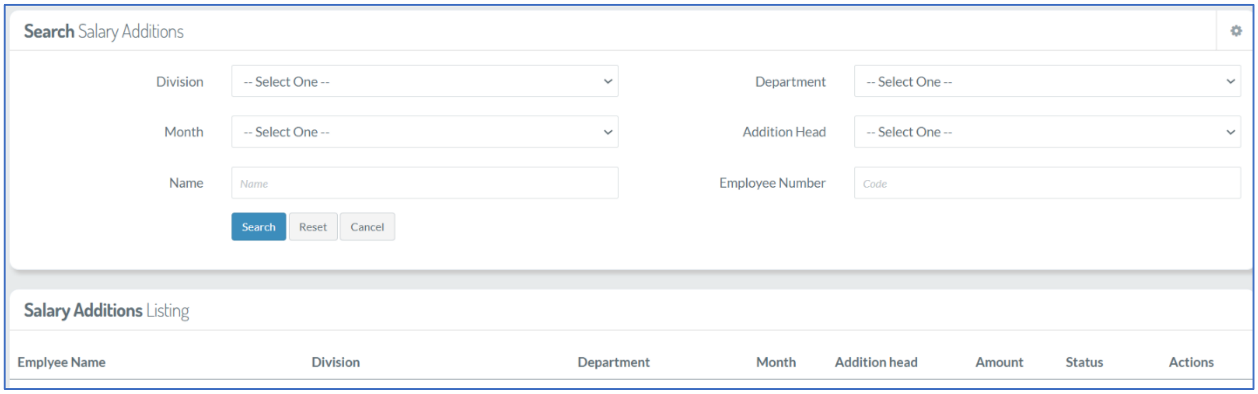
## a) Salary Additions

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.



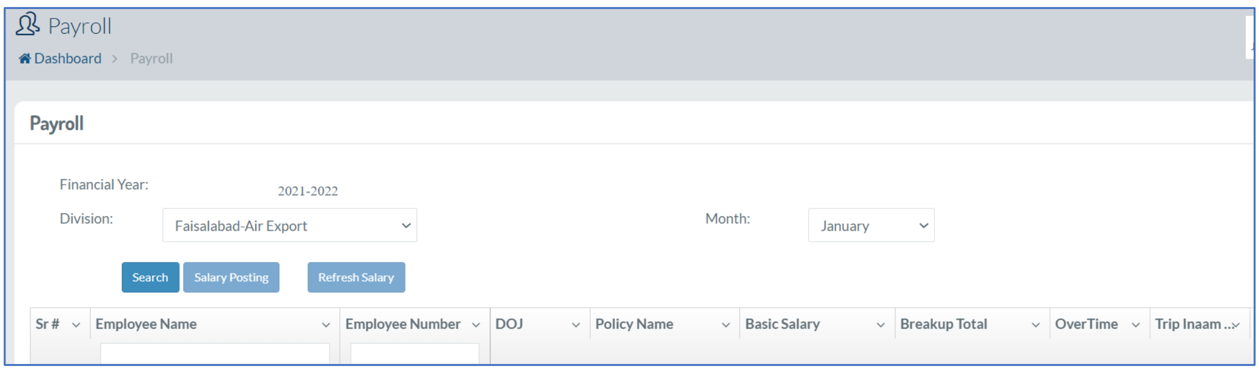



Listing view:



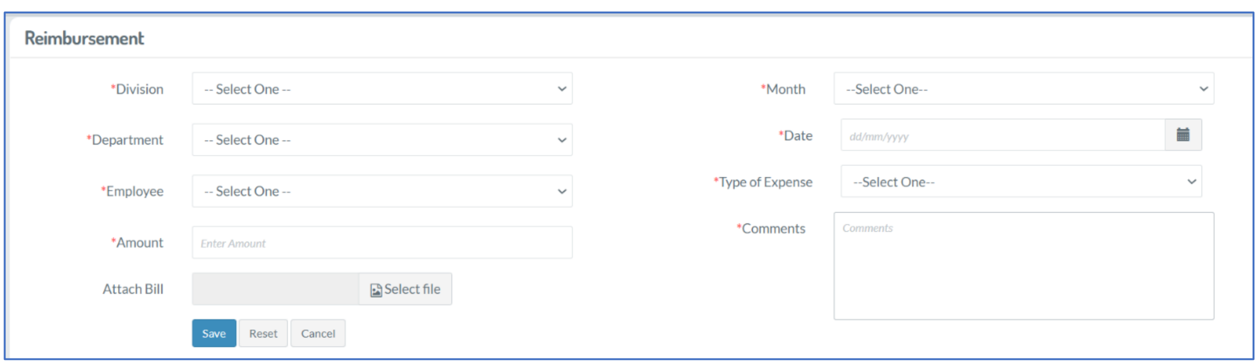

## b) Payroll:

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.



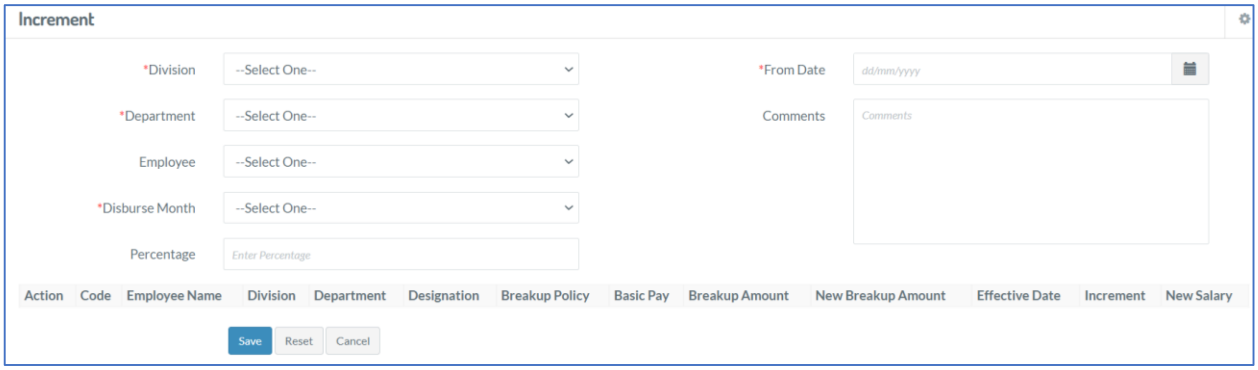

## c) Reimbursements

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.

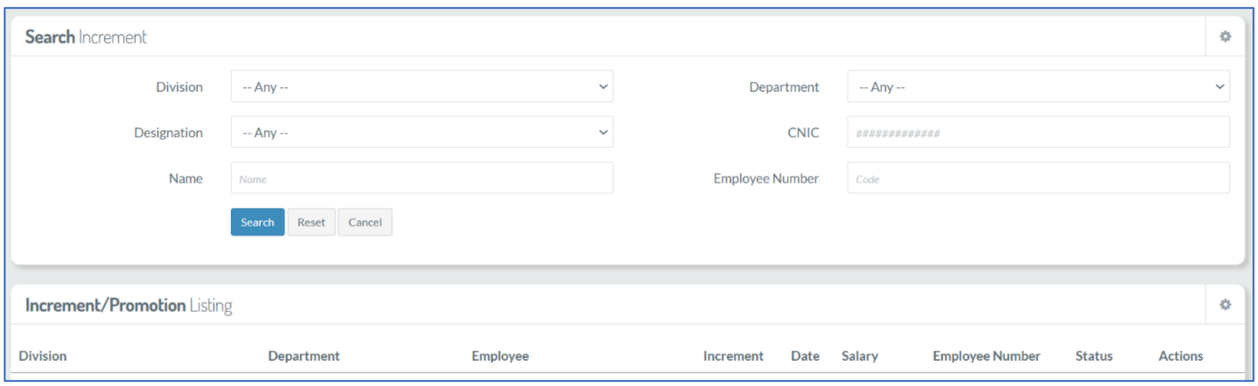


## d) Increments

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

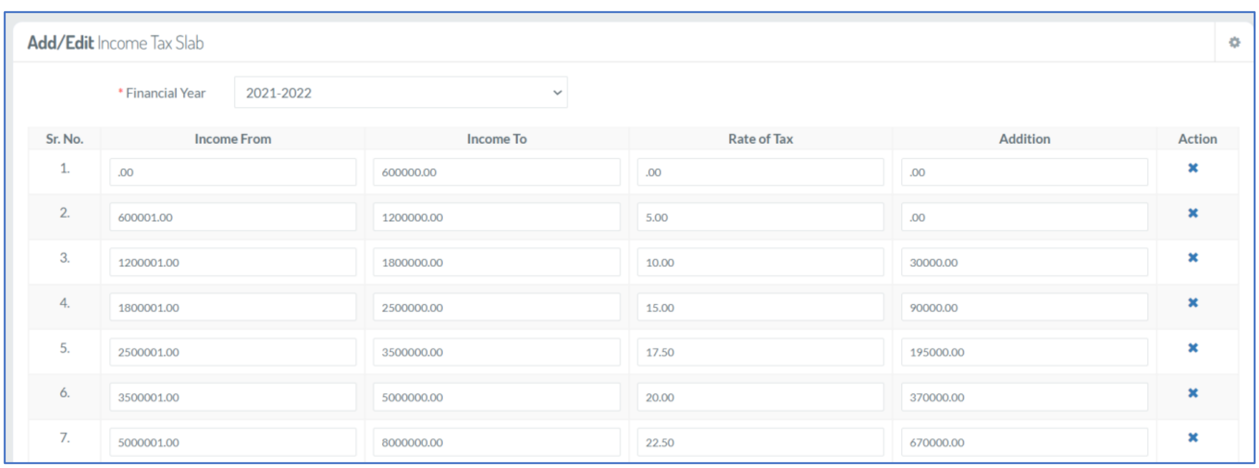



View to search existing increments:




## e) Income Tax Withholding Slabs

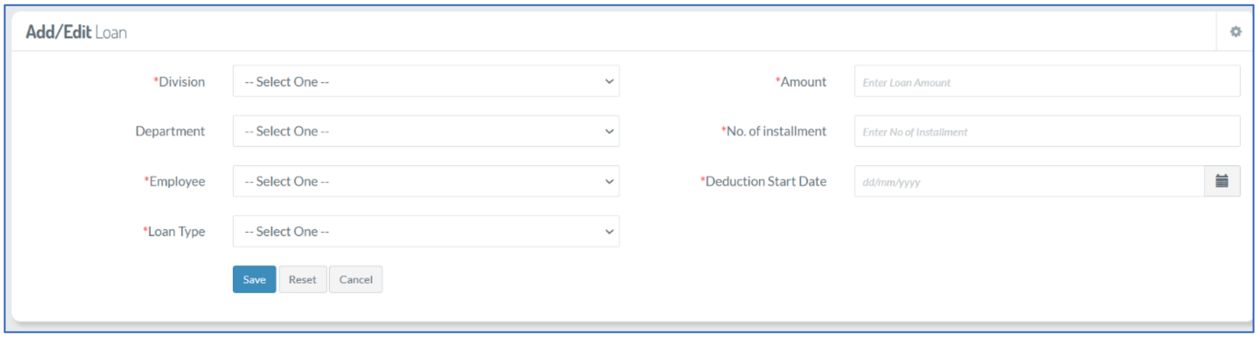
RELISYS allows to define financial year wise income tax withholding slabs. RELISYS will deduct the withholding income tax automatically as per annual taxable salary.



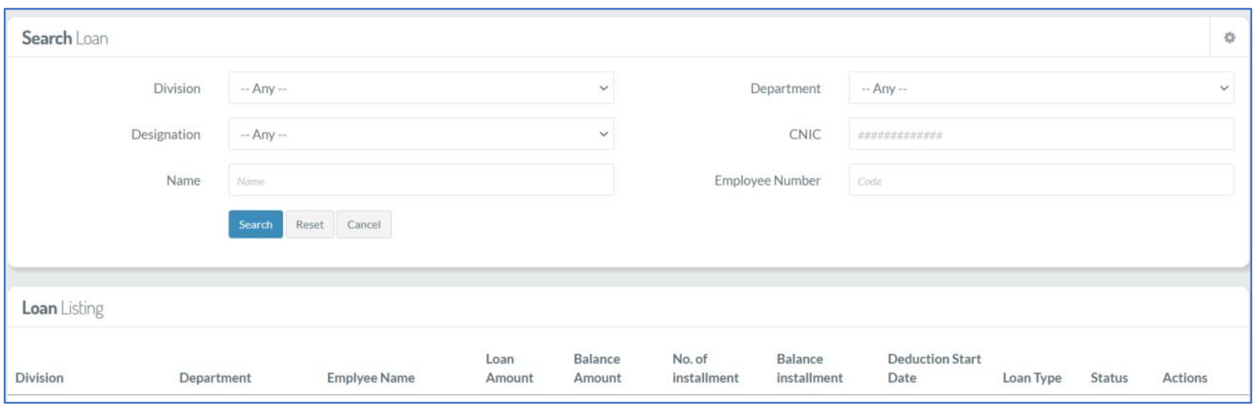

| Sr. No. | Income From | Income To | Rate of Tax | Addition | Action |
|---|---|---|---|---|---|
| 1. | .00 | 600000.00 | .00 | .00 | ✖ |
| 2. | 600001.00 | 1200000.00 | 5.00 | .00 | ✖ |
| 3. | 1200001.00 | 1800000.00 | 10.00 | 30000.00 | ✖ |
| 4. | 1800001.00 | 2500000.00 | 15.00 | 90000.00 | ✖ |
| 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.

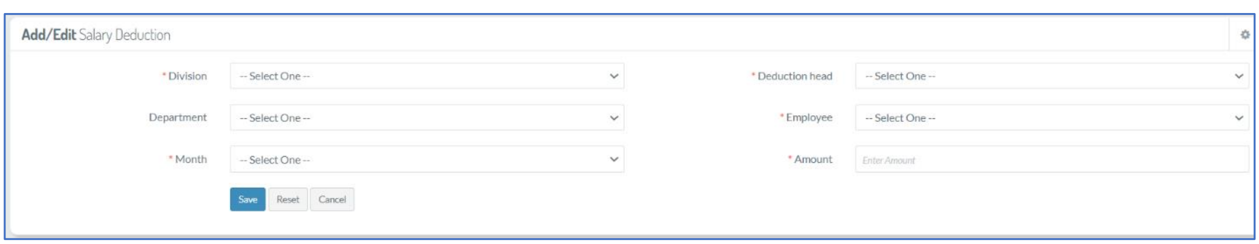



User can search the existing loan entries from respective logins, system provided information about remaining balance as well:



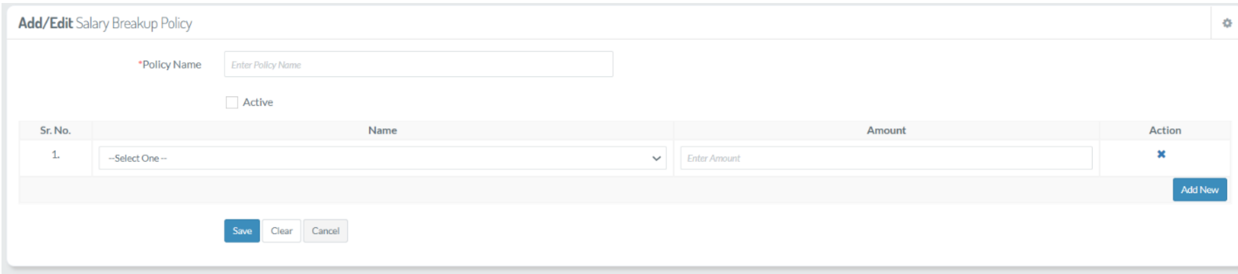

## g) Salary Deduction

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



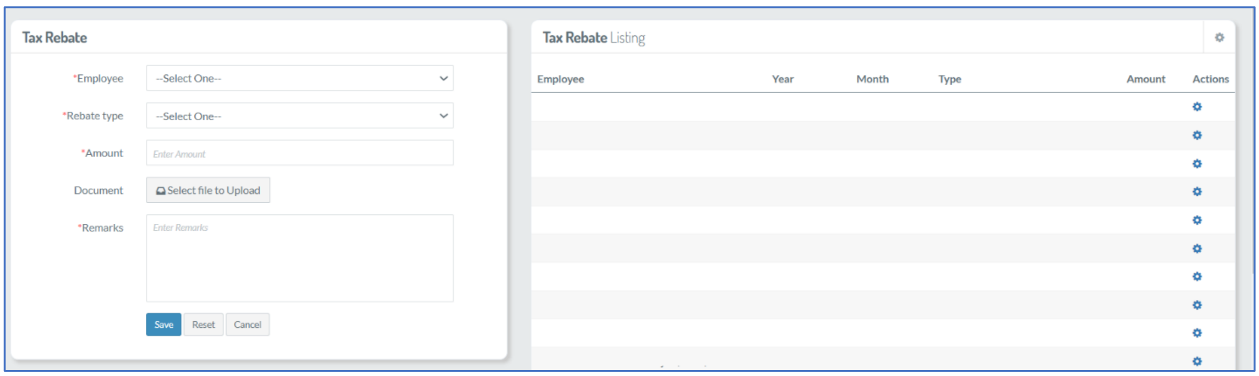
## h) Salary Breakup

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




## i) Tax Rebate

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.

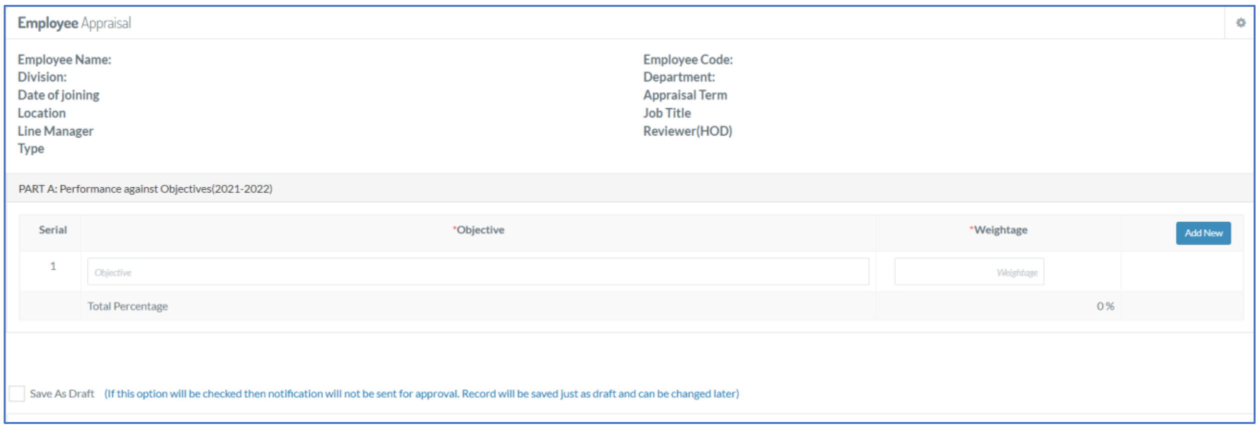


# 9) Performance Appraisal

## 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.

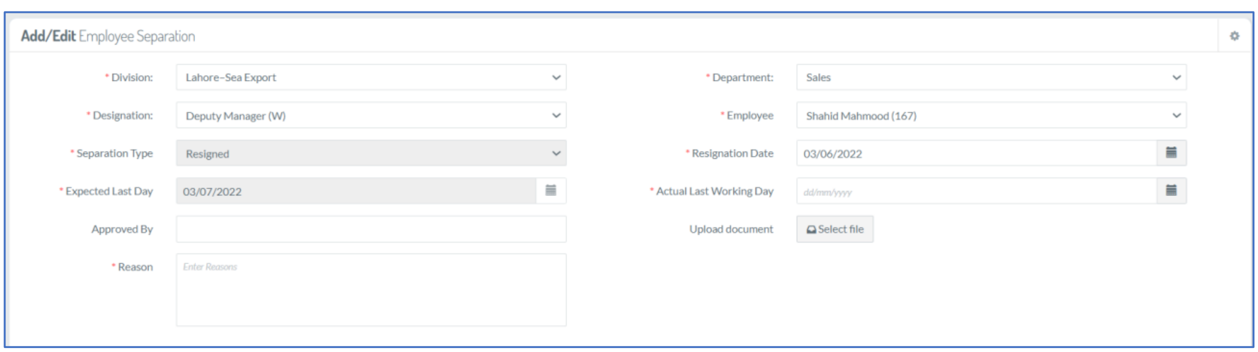
Once approved, system will save the objectives, and during performance appraisal, employee can mention the progress against each point, and objectives can be defined for upcoming appraisal period.




# 10) Employee Separation

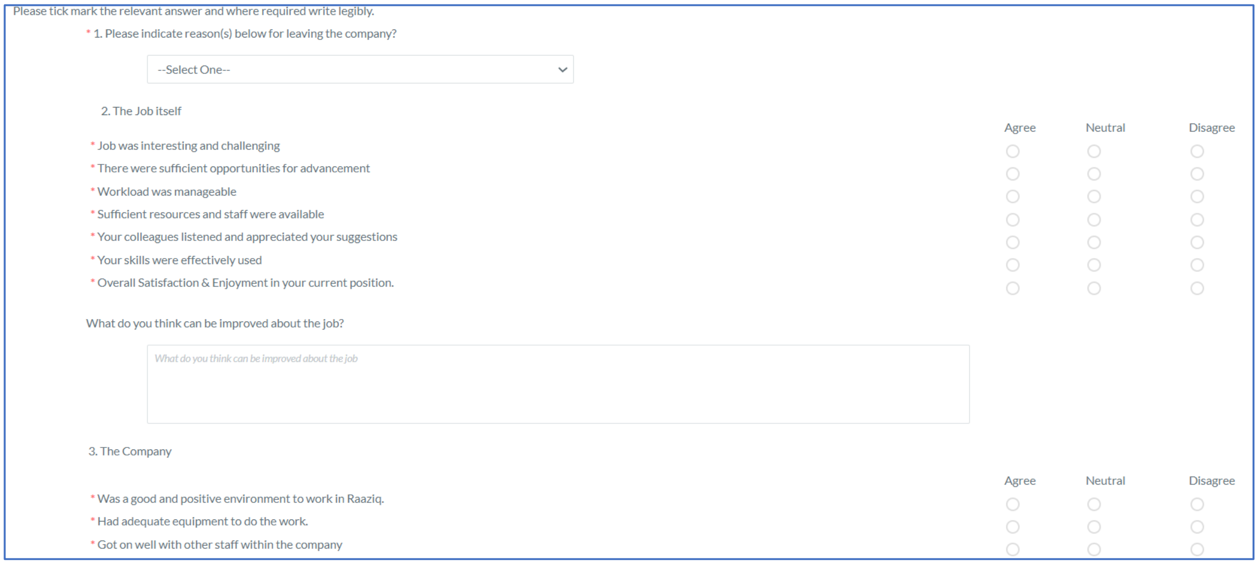
## a) Submit Resignation

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.



## 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 | | | |
| * There were sufficient opportunities for advancement | | | |
| * Workload was manageable | | | |
| * Sufficient resources and staff were available | | | |
| * Your colleagues listened and appreciated your suggestions | | | |
| * Your skills were effectively used | | | |
| * Overall Satisfaction & Enjoyment in your current position. | | | |

What do you think can be improved about the job?

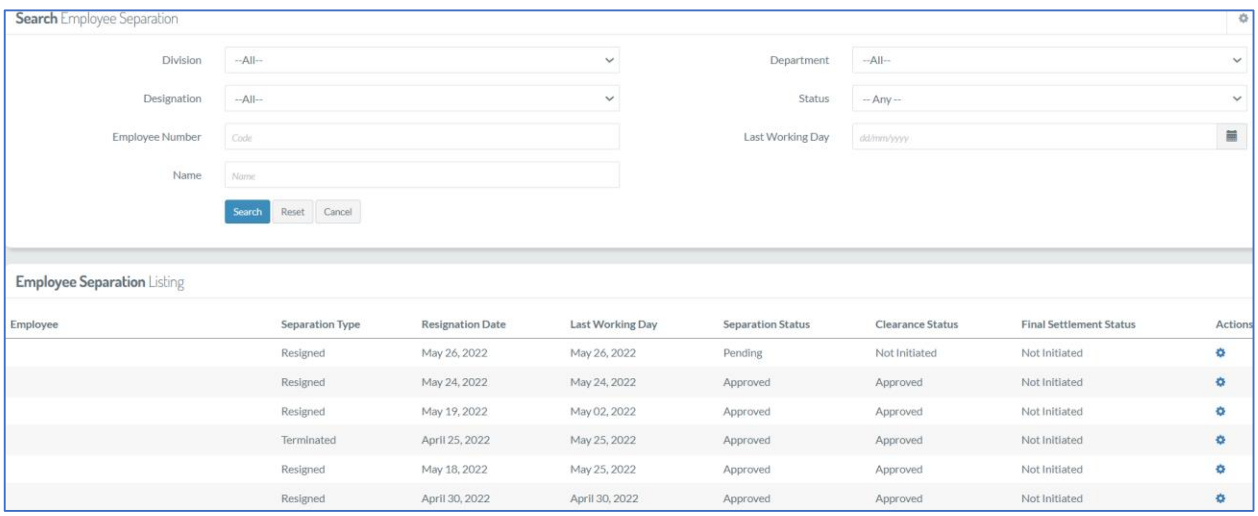
What do you think can be improved about the job

3. The Company

| | Agree | Neutral | Disagree |
|---|---|---|---|
| * Was a good and positive environment to work in Raaziq. | | | |
| * Had adequate equipment to do the work. | | | |
| * Got on well with other staff within the company | | | |

## 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 | |

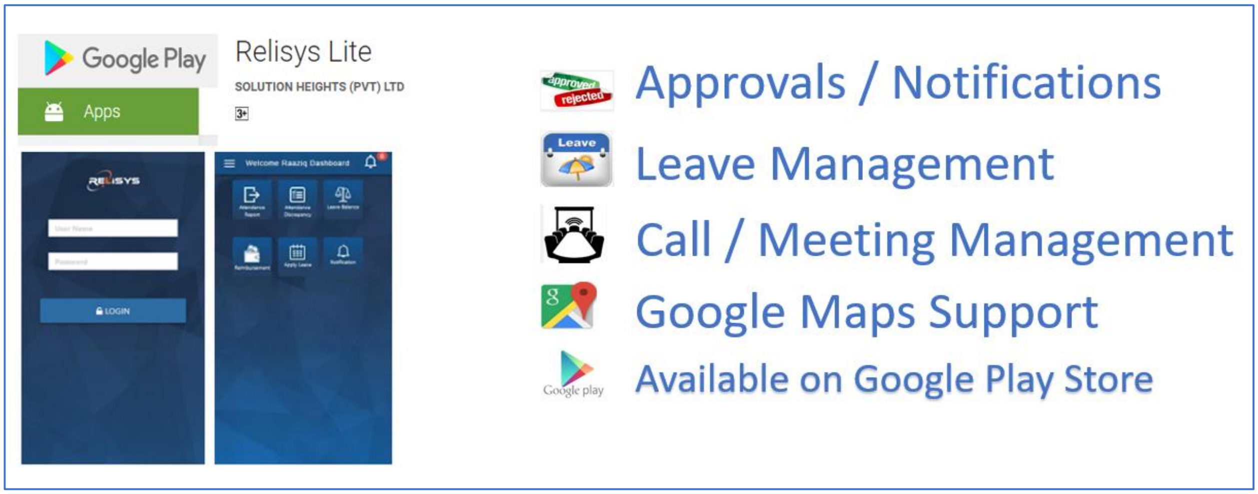
In order to initiate final settlement, click settings option against qualified resignation records and initiate final clearance and after that user will be to initiate final settlement.

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.



## 12) HR Analytics

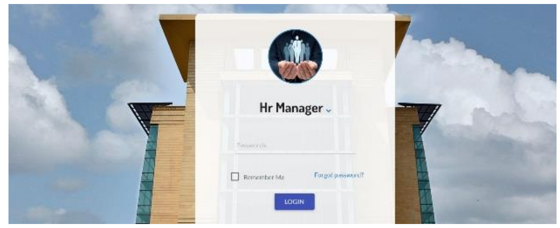
RELISYS HRM has built in HR analytics dashboards as well. It allows user to view the drill down analytic reports which are helpful in analyzing the data, and trends for future decision making.

## 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 paly store.

# Customer Relationship Management

## Why to Choose RELISYS CRM?

### 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.

### Covering complete customer cycle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### 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.

## 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 KPI's
- Integration with Operations module
- Dashboard and Reporting
- KPI'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/**

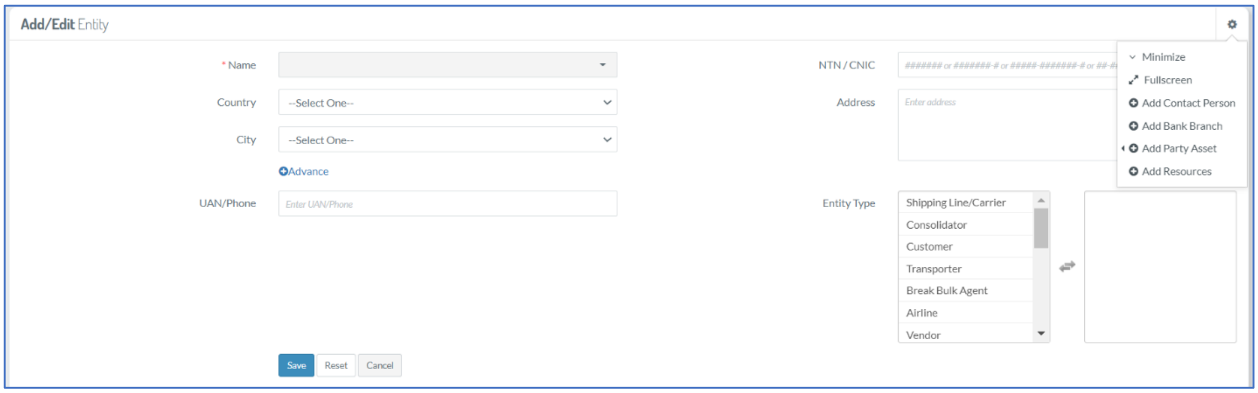
## 15) Functions:

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.

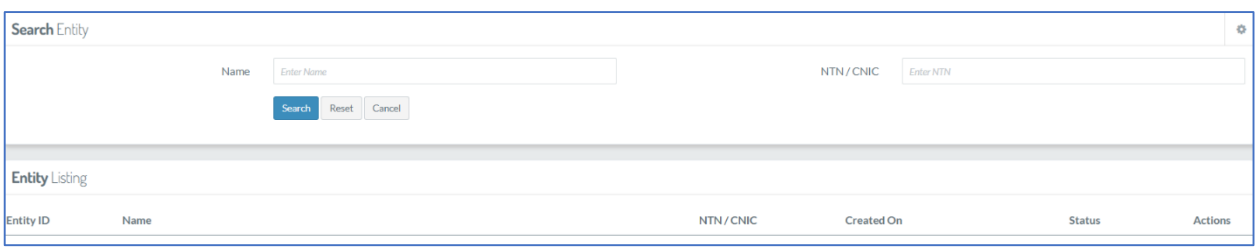



## b) Central Entity Repository:

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.




## 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.

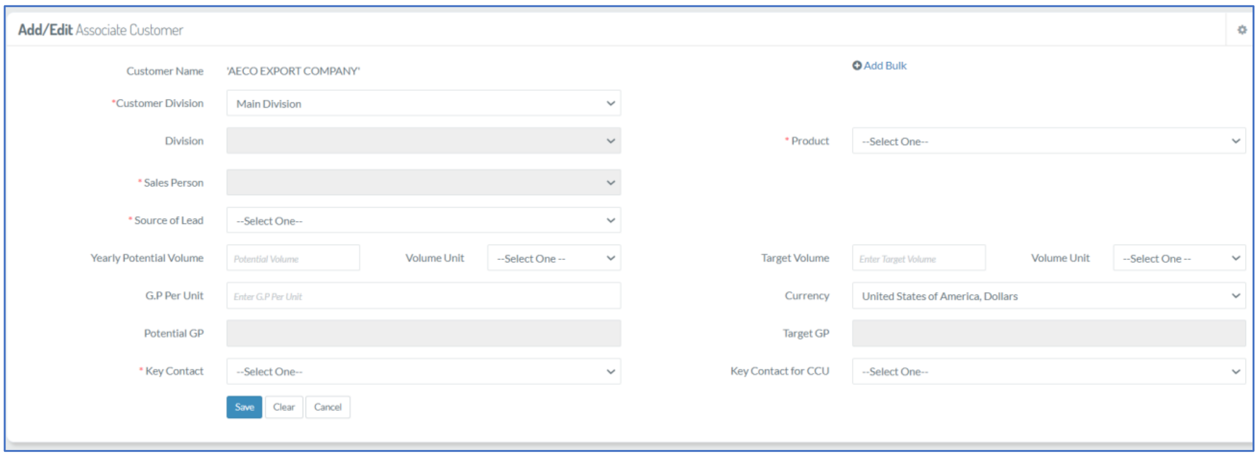
# 18) Lead Conversion Lifecycle

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

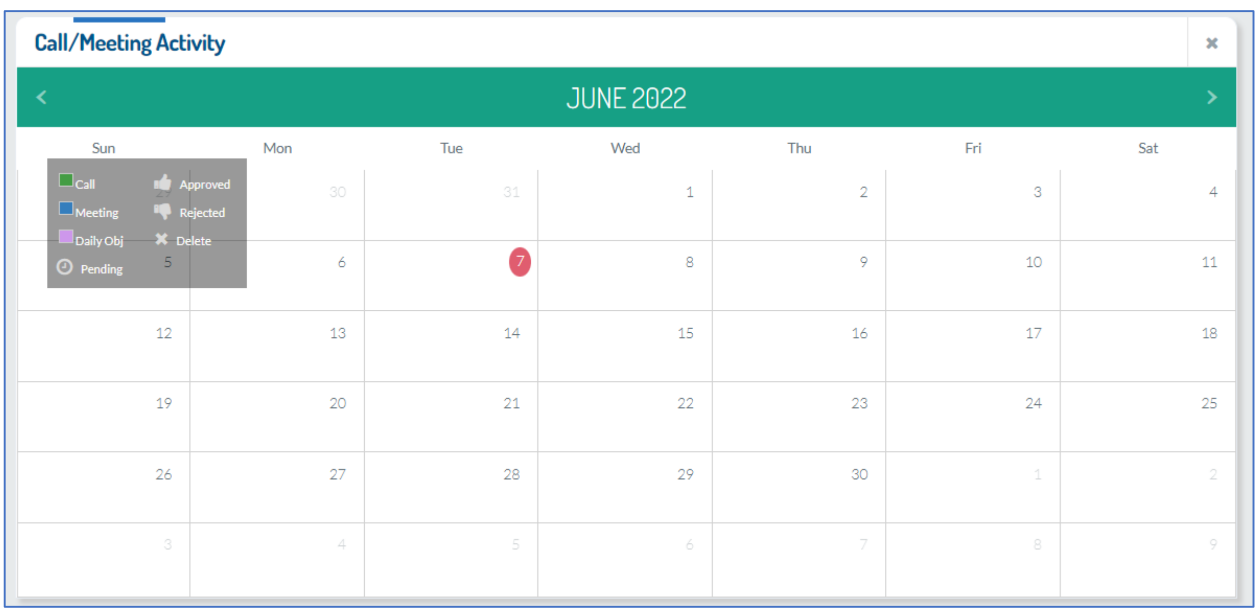
Once lead is approved and available in system, sales person can request association of that lead by providing information e.g. potential gross profit and target gross profit.

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.

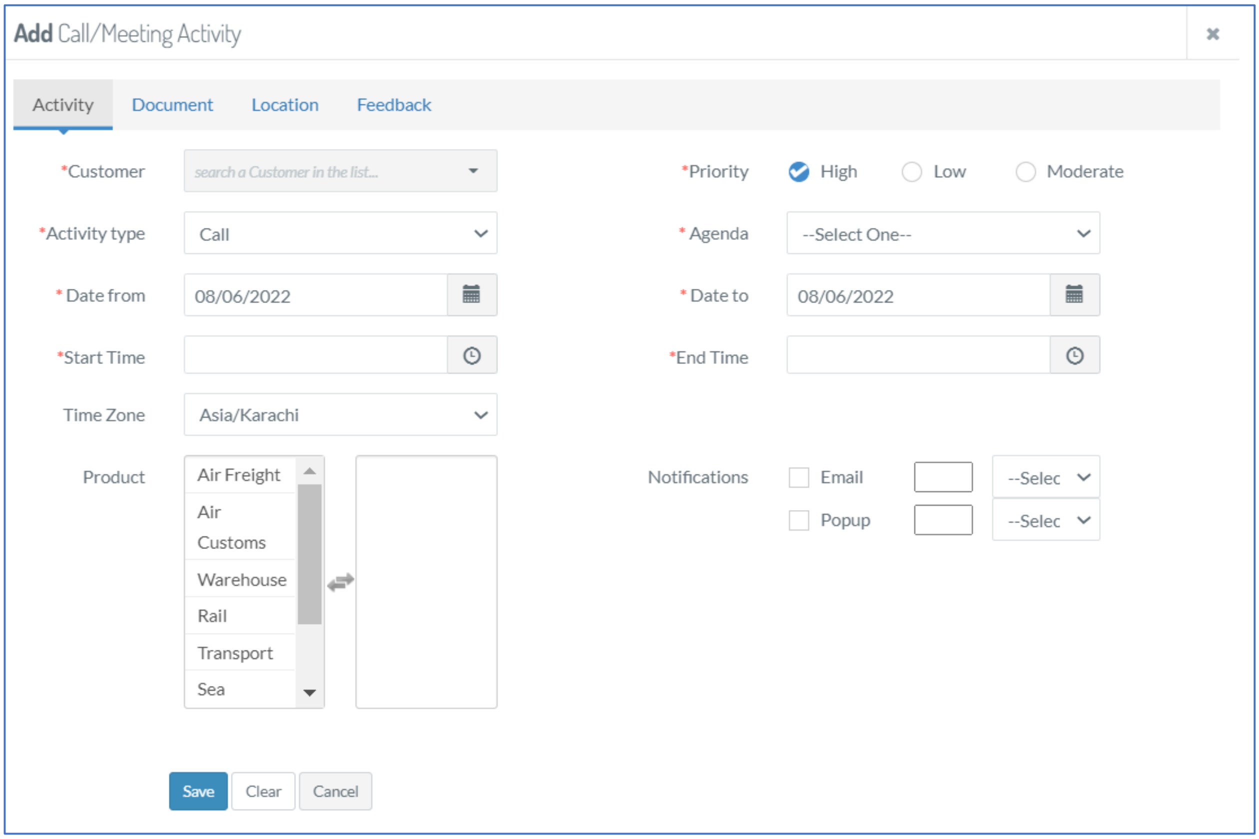



## b) Activity Planning

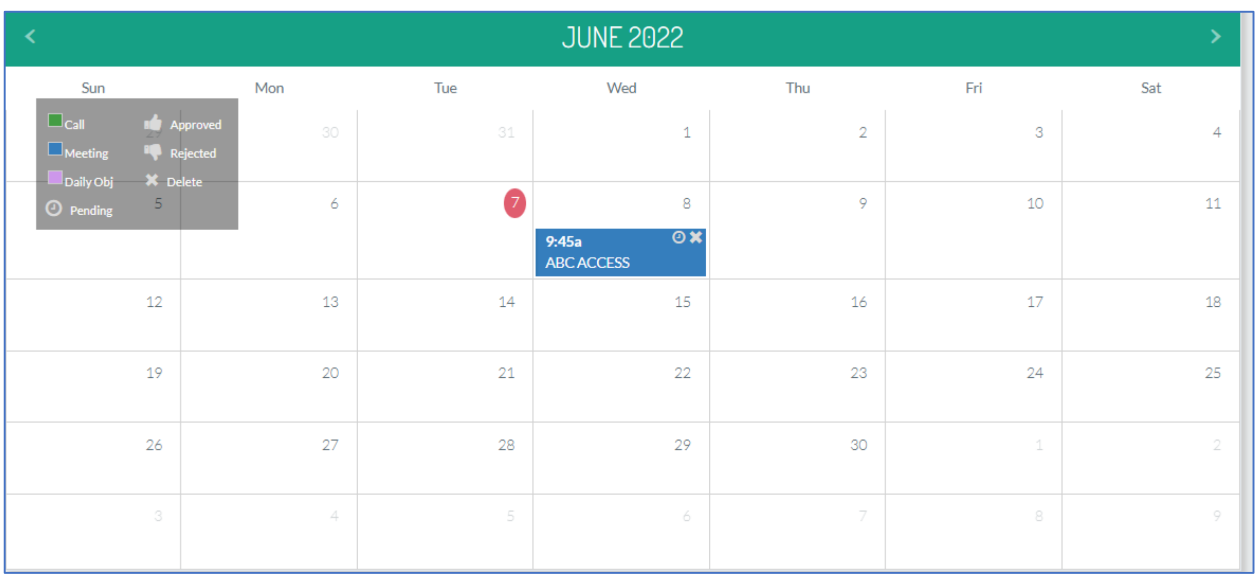
Once customer is associated, relevant sales person can plan the activities with lead. Calendar has been provided on the dashboard, which allows to plan activities easily.



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




And record will be saved:




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

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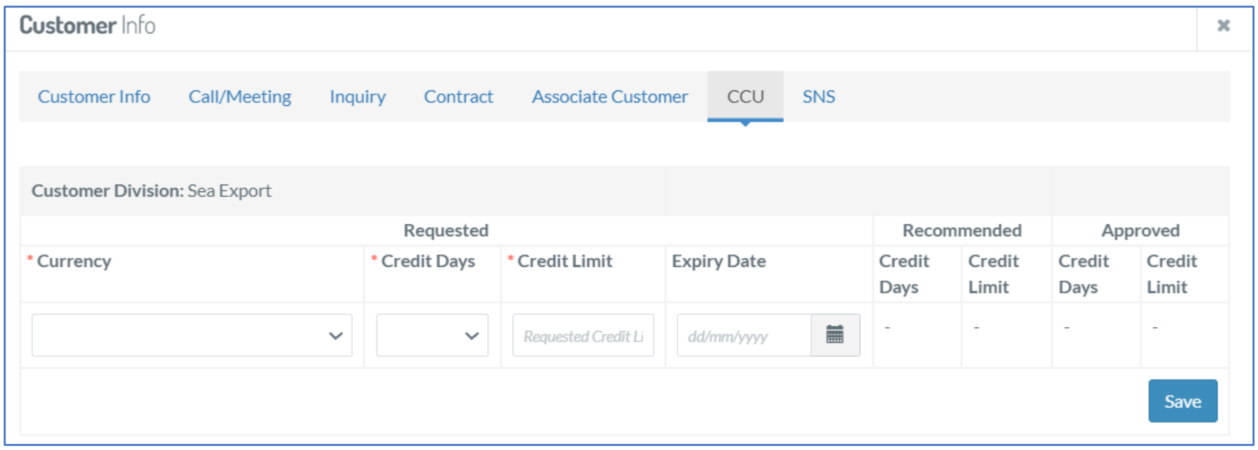
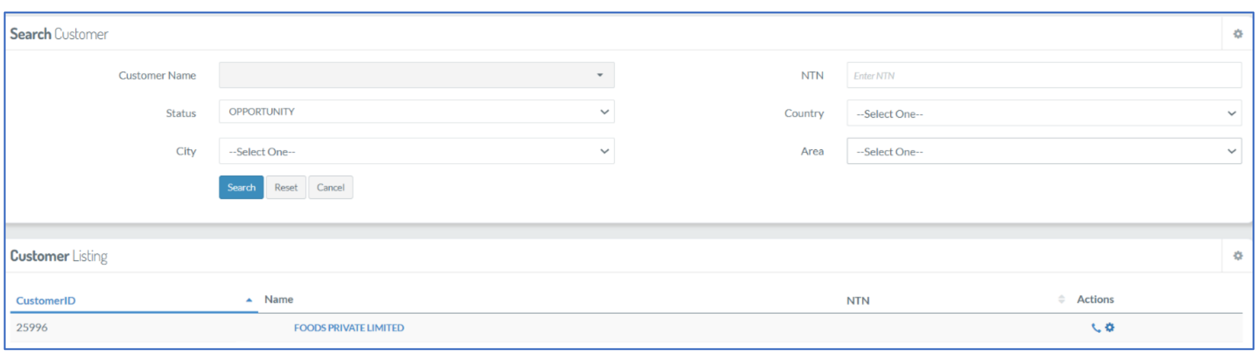


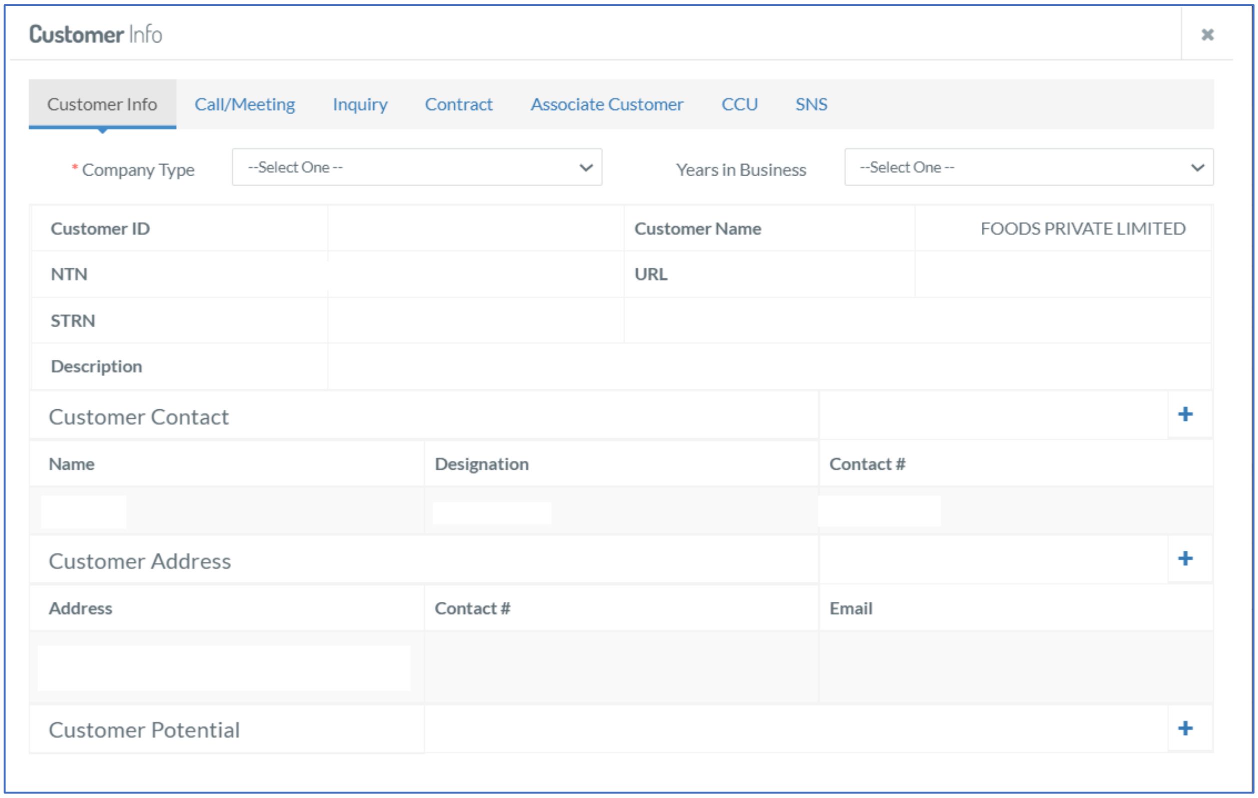

## e) Customer Consolidated View

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:



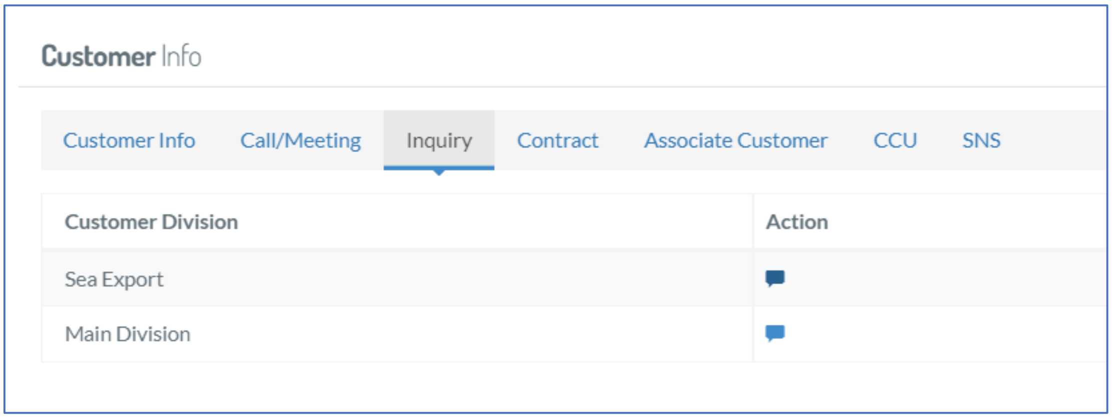
Click on the customer name and system will open consolidated view for customer:

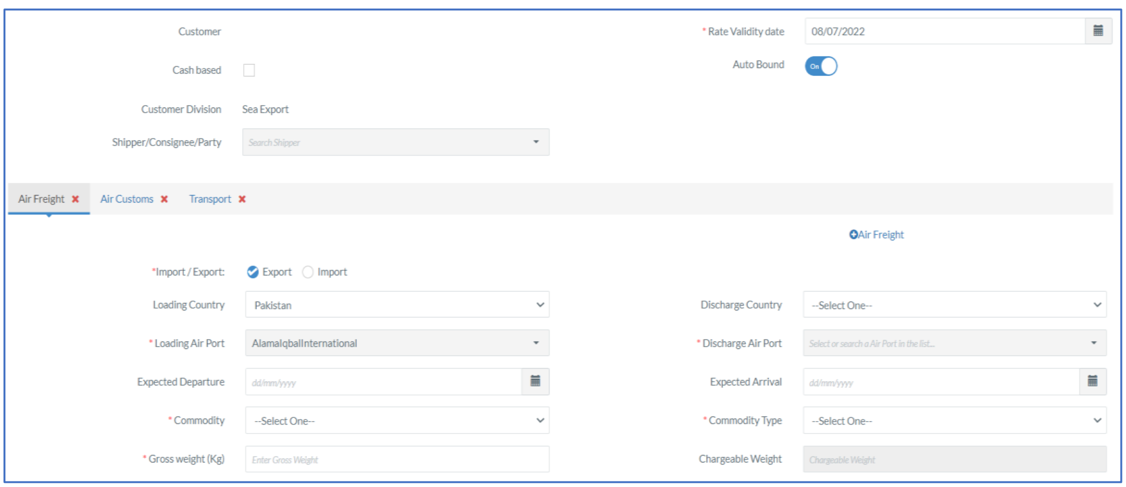


## f) Add Inquiry

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

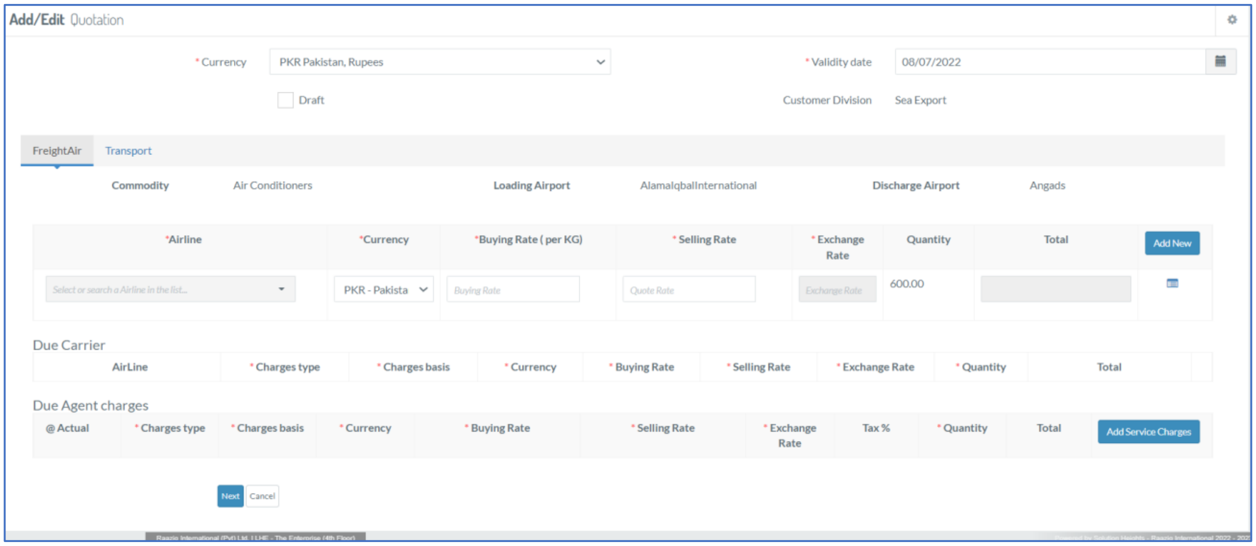
Sales person will select the inquiry against mentioned product.



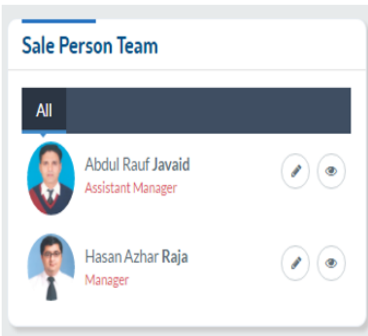
## g) Add Quotation

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.



# 19) Dashboard

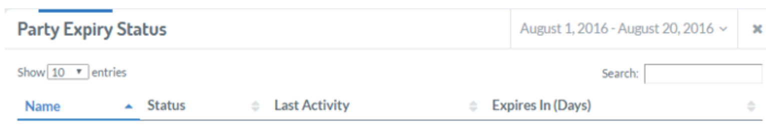
Sales Person 360 View



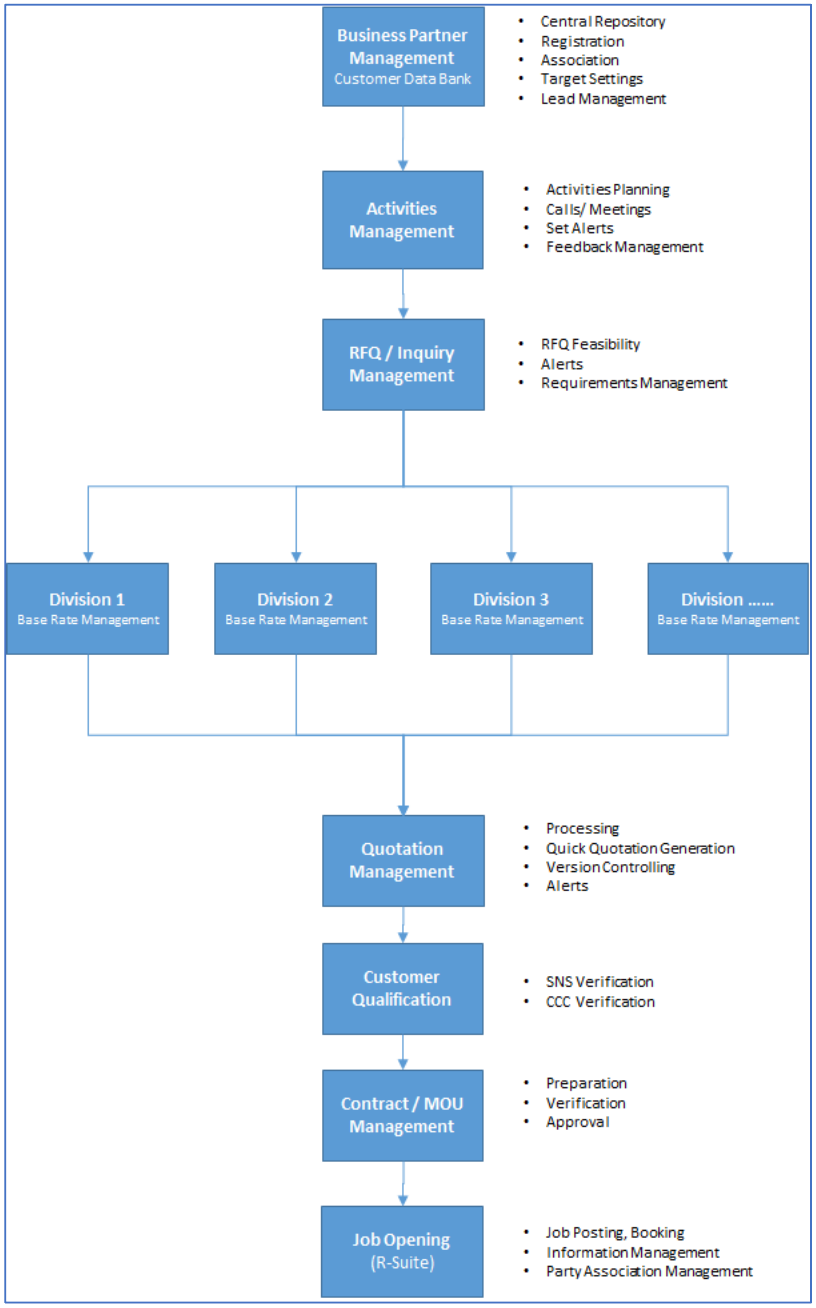

KPI Report Target VS Actual


Call Failure Reasons


Party Expiry Status Report



## 20) CRM Flow



Business Partner Management
Customer Data Bank
Central Repository
Registration
Association
Target Settings
Lead Management
Activities Management
Activities Planning
Calls/ Meetings
Set Alerts
Feedback Management
RFQ / Inquiry Management
RFQ Feasibility
Alerts
Requirements Management
Division 1
Base Rate Management
Division 2
Base Rate Management
Division 3
Base Rate Management
Division ......
Base Rate Management
Quotation Management
Processing
Quick Quotation Generation
Version Controlling
Alerts
Customer Qualification
SNS Verification
CCC Verification
Contract / MOU Management
Preparation
Verification
Approval
Job Opening
(R-Suite)
Job Posting, Booking
Information Management
Party Association Management