

CRM SOFTWARE

PROVIDING
A
FLUID
EXPERIENCE

INVENTORY AND STOCK

Basics

- ✓ Introduction
- ✓ Warehouse
- ✓ Item
- ✓ Opening Stock
- ✓ Accounting Of Inventory Stock
- ✓ Price Lists
- ✓ Stock Settings

Variants

- ✓ Item Variants
- ✓ Item Attribute

Setup

- ✓ Item Price
- ✓ Item Group
- ✓ Unit of Measure (UoM)
- ✓ Manufacturer

Stock Transactions

- ✓ Material Request
- ✓ Purchase Receipt
- ✓ Delivery Note
- ✓ Stock Entry
- ✓ Packing Slip
- ✓ Retaining Sample Stock
- ✓ Landed Cost Voucher
- ✓ Pick List

Serial and Batch Number

- ✓ Serial Number
- ✓ Batch
- ✓ Installation Note

Tools

- ✓ Quality Inspection
- ✓ Stock Reconciliation
- ✓ Quick Stock Balance

Return

- ✓ Sales Return
- ✓ Purchase Return

Advanced

- ✓ Delivery Trip
- ✓ Projected Quantity
- ✓ Perpetual Inventory

CRM

Sales

- ✓ Lead
- ✓ Customer
- ✓ Address
- ✓ Email Campaign
- ✓ Opportunity
- ✓ Contact
- ✓ Campaign
- ✓ Newsletter

Reports

- ✓ CRM Reports

Setup

- ✓ Lead Source
- ✓ Sales Stage
- ✓ Customer Group
- ✓ Contract
- ✓ Opportunity Type
- ✓ Sales Person
- ✓ Email Group

SELLING

Sales

- ✓ Quotation
- ✓ Blanket Order
- ✓ Territory
- ✓ Sales Order
- ✓ Sales Analytics
- ✓ Coupon Code
- ✓ Brand
- ✓ Sales Partner

Setup

- ✓ Selling Settings
- ✓ Product Bundle
- ✓ Item Price
- ✓ Sales Person Target Allocation
- ✓ Shipping Rule
- ✓ Sales Taxes and Charges Template

PURCHASE

Purchase Cycle

- ✓ Request For Quotation
- ✓ Purchase Order
- ✓ Purchase Taxes and Charges Template

Supplier

- ✓ Supplier
- ✓ Supplier Quotation
- ✓ Supplier Scorecard

Setup

- ✓ Buying Settings
- ✓ Supplier Group

Employee

- ✓ Employee
- ✓ Department
- ✓ Employee Group
- ✓ Employment Type
- ✓ Designation
- ✓ Employee Health
- ✓ Branch
- ✓ Employee Grade
- Insurance

Attendance

- ✓ Attendance
- ✓ Attendance Request
- ✓ Employee
- ✓ Upload Attendance
- Attendance Tool
- ✓ Auto Attendance

Leaves

- ✓ Leave Management
- ✓ Leave Policy
- ✓ Compensatory Leave Request
- ✓ Holiday List
- ✓ Leave Allocation
- ✓ Leave Encashment
- ✓ Leave Type
- ✓ Leave Application
- ✓ Leave Block List
- ✓ Leave Period

Recruitment

- ✓ Staffing Plan
- ✓ Job Opening
- ✓ Job Applicant
- ✓ Job Offer

Training

- ✓ Training Program
- ✓ Training Event
- ✓ Training Result
- ✓ Training Feedback

Employee Lifecycle

- ✓ Employee Lifecycle
- ✓ Employee Separation
- Management Introduction
- ✓ Employee Transfer
- ✓ Employee Onboarding
- ✓ Employee Skill Map
- ✓ Employee Promotion

Payroll

- ✓ Payroll Management
- ✓ Salary Structure
- ✓ Additional Salary
- ✓ Payroll Period
- ✓ Salary Structure Assignment
- ✓ Retention Bonus
- ✓ Salary Component
- ✓ Payroll Entry
- ✓ Employee Incentive

Training

- ✓ Employee Tax
- ✓ Employee
- Exemption Declaration
- Benefit
- ✓ Employee Tax
- Application
- Exemption Proof
- ✓ Employee
- Submission
- Benefit Claim

HUMAN RESOURCES AND PAYROLL

Performance

- ✓ Appraisal
- ✓ Energy Point System
- ✓ 1.10 Expense Claims
- ✓ Expense Claim
- ✓ Employee Advance

Loans

- ✓ Loan Management
- ✓ Loan Type
- ✓ Loan Application
- ✓ Loan

Shift Management

- ✓ Shift Management

Fleet Management

- ✓ Fleet Management
- ✓ Vehicle
- ✓ Vehicle Log

Settings

- ✓ HR Settings
- ✓ Daily Work Summary Group

Reports

- ✓ Human Resources Reports

ASSET

Asset Management

- ✓ Asset
- ✓ Asset Category
- ✓ Asset Location
- ✓ Asset Movement

Asset Maintenance

- ✓ Asset Maintenance Team
- ✓ Asset Maintenance
- ✓ Asset Maintenance Log
- ✓ Asset Repair

Asset Transactions

- ✓ Asset Value Adjustment
- ✓ Purchasing an Asset
- ✓ Selling an Asset

Discarding Assets

- ✓ Asset Depreciation
- ✓ Scrapping an Asset

Assets Reports

- ✓ Assets Reports

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