

Realx ERP Module Description

Please find following module details in Realx ERP. Please review this and let me know if you need a demo for the system. We also offer customization as per requirement.

- Pre-Sales CRM
- Post-Sales CRM
- Supply Chain and Inventory Management
- Contract and Billing Management
- HRMS and Payroll Management
- Ticket and Task Management
- Document Management

1) Pre-Sales CRM Module: It has all the functions required to manage manage leads, follow-up and converting into customer. It also has API integration capability with other digital platform. Inbuilt reminders for call-later, schedule site visit or follow-up keeps you ahead of your competitor. Please [click](#) here for more details.

Tracking Leads is whole lot easier now:

- Realx ERP allows you to communicate effectively with customers and establish relationships with new leads. Realx ERP users enjoy the easy-to-use interface and find it extremely valuable in their day-to-day business operations.
- Realx ERP lets you store all your leads lifetime and access them at any time from any computer or mobile device.
- In an industry where every inquiry is unique, the usual CRM solutions won't tell you what products or projects your customers and prospects are interested in. Realx ERP allows you to filter by product or project.
- Realx ERP enables targeted communications for sales teams and allows them to anticipate future requirements.
- 3rd party API integration: FREE API integrations with any portal from where you are receiving leads.

- Post-integration, leads from all different source appear on realx ERP automatically, in real time.
- With auto-assignment and auto-profiling, half of the job is done before even you get started.
- Manage leads & follow up: Add, View, Edit, Delete, Assign leads to all from the dashboard.
- Manage all leads and prospective buyer information from a single location.
- Reach out with new offers and deals on the click of a button.
- Reach out to the right prospects for the right projects by profiling the database.
- Inbuilt reminders for call-later, scheduled site visits or follow-up tasks.
- Search filters & leads history: Searching has never be so simple!
- Powerful filters to get the exact data you need. Set filters on your reports to show only the most relevant information that you are needing at the time.
- Complete follow-up history is maintained to make the entire process system driven, in stead of resource-dependent.
- Reporting Analytics & reporting: Charts to help businesses make better decisions. Reports to measure the quantum of efforts behind sales, both in terms of cost and time.
- Identify the sources of quality leads and plan your next budget accordingly.

2) Post-Sales CRM Module: When it comes to your loyal customers, the faster your service the better. A few seconds could make all the difference. It has all the functions required to manage customer booking after sales, payment collection and follow up for payment. Please [click](#) here for more details.

- Your Customers is one click away: When it comes to your loyal customers, the faster your service, the better. A few seconds could make all the difference.
- Realx ERP offers comprehensive solution to manage build, sales and customer care aspects of property development.
- Keeping track of customers has never been so simple and affordable!
- Take control of the booking process
- Define the complete project setup in a structured manner.
- Manage changes to pricing, payment structure, tax rates, templates etc. from a single place.
- Create Customer Profile, send Welcome Email and create payment schedule in step by step process.
- Integration with leads and contact database ensures that all bookings are error free and it is an easy job for the CRM personnel.
- payment Collection and payment: Predefined payment structure makes sure that all the invoices are

generated accurately and on time.

- Automatic reminders to buyers, ensuring collection on time.
- Buyers get automatic SMS notifications for the paid amount and get sent the payment receipt instantly to their email.
- Home customization & milestone update
- Stop revenue leakage due to ad hoc customization requests.
- Define offered customization with the attached cost and manage all the customization requests from a single window.
- Email and SMS is sent to buyer on the progress of the project.
- Demand notice gets generated on the format specified by you.

3) Supply Chain and Inventory Management Module:

- Managing your supply chain is key to keeping your execution on track. Realx ERP streamlines supply chain and inventory management function in a simplified way.
- Supply Chain Management (SCM) module allows you to easily manage your purchases and helps you to reduce purchase cycle and administrative burden.
- The purchasing module automatically checks inventory levels for shortfalls and initiates purchase orders on time.
- Real Estate and Construction being very large capital intensive industry, it is important to control material inventory using effective supply chain management system.
- SCM module ensures end to end communication and transparency among Project Site, Store and Vendor.

SCM Processes

- Purchase Requisition
- Material Indent
- Purchase Order
- Advance Purchase Bill
- Material Receipt Note (MRN)
- Goods Receipt (GRN)
- Stock Transfer
- Material Issue
- Issue Return
- Inventory Stock
- Purchase Bill & Recovery
- Payment Certificate

4) Contract and Billing Management Module: Contract management module has all the functions required to project execution. Subcontracting module consists of Estimation, Work Order,

Measurement, Advance Billing, Work done Billing, Retention, Release, Advance Recovery, Payment Certificate and different report required to manage your execution smoothly. Please [click](#) here for more details.

Project cost estimation & budgeting

- The Realx ERP contract management module helps create the budget and track the cost against the budget.
- To setup, define a project, create project structure, create work breakdown structure (WBS) with jobs & activities, rate analysis for material, labour & machinery.
- Quantity is estimated with respect to the BOQ quantity of the drawing file.
- As soon as the estimation is approved, Realx ERP saves the Zero Cost (Initial) Budget using estimated quantity and RA rate.
- Zero cost budget helps analyze cost variation at a later stage.
- The Realx ERP system allows you to amend an estimation as the scope changes.
- It also gives you S-Curve that helps in predicting cash flow requirements, managing budgets effectively, and making informed decisions about resource allocation and scheduling.

Speed up work order creation from competitive bidding

- Realx ERP supports fully-integrated request for quote (RFQ) processing.
- Choose contractor to send RFQ for estimated quantity.
- On submission of request, mail will be sent automatically to all selected contractors.
- Contractor responses can be entered into system either through manual processes or directly by the contractor via a secure contractor portal over the internet.
- Once the contractor has been selected, work orders can be created directly from the RFQ.

Accurate measurement and billing system is key to success.

- Realx ERP helps the site engineer or supervisor to track the completion by Daily Progress Report (DPR).
- Best Work Order Management software
- Realx ERP has a comprehensive data capturing mechanism to create measurement of books (MB) based on the actual percentage of completion.
- Measured quantity goes for billing process and after payment, accounting team post the payment details in Realx ERP.

5) HRMS - HR and Payroll Management Module:

A perfect HR management system streamlines all HR processes and brings them within a single window. It provides all the necessary tools to build, manage, and motivate your team.

HR activities can take up a big chunk of your day. When your team is spending time managing distributed HR tasks, it is time you are not spending on growing your business.

Realx ERP has multiple support options for a business' HR needs.

Key Features of Payroll Module

- **Single-window Employee onboarding:** Hiring, job assignment, assigning role & department, capturing statutory requirements of employee including pan, aadhar permanent address, salary details, attendance from bio-metric system and track of attendance records, approval of timesheet, cost allocation and termination and final processing.
- **Biometrics-enabled Attendance tracking system:** With the aim of developing an efficient and user-friendly attendance system, we offer direct integration of your existing Biometric device with Realx ERP. It pulls all the swipes from the devices periodically and makes them available to the ERP system to process as per your business needs. This enables a real-time attendance tracking system fully integrated with other HR functions like leave management and payroll processing.
- **Automated Leave management:** Leave setup, leave application, paperless leave approval/rejection, leave carry over, leave credit, finding leave balance by end of the year, finding loss of pay for payroll processing.
- **One click Payroll processing:** Configuring earning and deduction element, their processing rule and calculation rule, yearly bonus or any unscheduled payment, payroll processing for an individual or for all employees together, tax computation & estimation for individuals, emailing payslips and bulk payslip printing. Generation of payment advice for the bank, generation of form16 for employees.

6) Support Ticket Module:

Keep track of your tasks & communications with our simplified ticketing system. Realx ERP Ticketing Module allows you to track and follow up on your employee, customers and agents efficiently. Realx ERP helps you resolve issues together and collaborate as a team.

Key Features to Streamline project communication:

- **Create, edit & search tickets:** Create a ticket with Project Name, Unit Name, Category & Priority. Search and edit tickets in accordance with access privileges.
- **Multiple tasks in 1 ticket:** A ticket can contain any number of tasks. A ticket can only be closed only when all tasks contained are completed successfully, .
- **Categorization & prioritization:** Categorize internal vs external based on source. Prioritize according to urgency of the concerned task.
- **Assign/reassign tickets:** A ticket can be assigned & reassigned any number of times during its lifetime, based on the progress of the task or the challenges faced.
- **Track ticket history:** View the complete history of a ticket, along with notes & attachments, and analyze performance.

- File management: Organize all notes & attachments for a task in the most efficient manner.
- External/internal task management: Allow access to your external agents, vendors & contractors. Allow people outside the team to raise tickets as well.
- Follow/unfollow ticket: Assign resources to follow the progress of a task, any number of times during the lifetime of a ticket.

7) Document Management Module:

- Create templates for various documents and generate them on click of a button with all the buyer and project information automatically merged.
- Share and store all the documents on cloud - plans digitally in a central location.
- Documents are accessible to all stakeholders easier than ever before.
- Demand notice gets generated on the format specified by you.

Other Details:

It is cloud based application where we manage hosting, software update and server maintenance as and when required. All data gets backed up in the cloud every end of the day. We offer on-site training as and when you need.

Support: Unlimited support from our team for any issues or any modification required. We have very good support team to help your team. Application is also very user friendly.