

MOBILEERP V10.0

1	2	3	4	5	6	
Departments(UserGroup)	Marketing	Insurance	Purchase	Stores / IQC	Accounts	Statutory
Roles - Role 1 / Role 2 / Role 3	Manager / Executive / Partner	Manager / Executive / Agent / Partner	Manager/Executive/Employee	Manager / Executive	Manager / Executive	Manager
Posts: Username and Password	MKTGMGR / MKTGEXEC	MGR / EXEC / AGENT / PRTRN	PURMGR / PUREXEC / EMP	STORMGR / STOREXEC	ACCMGR / ACCEXEC	STATMGR
Activities grouped by basic functions	<u>Sales Organization Setup</u> Territory - Region/State/City Partner - Distributor/Dealer/Stockist Branch - CFA/Subsidiary Salesperson/FieldForce - RBM/ABM/MR (Sales Targets / Incentive Management) <u>Product Mix Setup</u> Product Group FG Item Master Marketing Activities MarketingBudget Creation Campaign Creation <u>Leaflet/CD/GIFT/Advertisement</u> Prospects/Contact Database Creation <u>Mailer/SMSer Campaign</u> Physical Sales Call Execution <u>Phone/Mktg Material Record keeping</u> Website Design & Content Publishing <u>Links to e-Comm, Auction, Contact, Resumepost</u> Leads Entry by Manager <u>Leads Entry via Self service by Executive</u> <u>Leads Entry via Website by Partner</u> <u>Generated via all above campaigns</u> <u>Primary / Secondary Sales Reporting</u> (Primary Manually / Import data from Secondary) <u>Inquiry Processing for Custom Built Product</u> <u>Inquiry/Tender Entry</u> (<u>Build Product/Price</u>) Quote Approve <u>Quotation/Bid Printing</u> <u>Marketing Reports</u> Lost inquiry/jobs with reasons Success Inquiry Territorywise sales performance Partnerwise sales performance Salespersonwise sales performance Campaign Performance Competitor Performance Market Share Analysis	<u>Setup Insurance System</u> Insurance policy types Insurance policy master setup Insurance policy premium master setup Insurance policy tenure rules Insurance encashment rules <u>Selling Insurance Policy</u> Enter Insurance customer details Assign and activate the policy for that customer Collect and submit premium from customers <u>Premium followup from policy holder</u> Auto send premium reminder to policy holder Sales person checklist for premium collections <u>Collection of Premiums</u> Collection and deposits of premium Premium accounting Interest accounting on delayed premiums <u>Claims Processing for Insurance policy</u> Enter receiving of claims Check claims as per checklist Approve / Part approve or disapprove claims Print and send cheque of claims to customer <u>Agents commission processing</u> Computation of agents commission Verification of agents commission Payments of agents commission Accounting of agents commission Insurance specific special accounting <u>Insurance specific reports</u> Insurance KPI Parameters check Insurance specific 6-Sigma checklist Insurance specific top 10 reports <i>e.g. Insurance specific Top 10 agents</i> Policy by region/agent/branch/collections Claims by region/agent/branch/payments Profit by region/agent/branch Profit by insurancetypes Profit by employee performance Profit by customer	<u>Purchase database setup</u> Supplier Creation PO Type Creation PO Remarks Creation PO Pay Code PO Inco Terms <u>Indenting Process</u> <u>PR Entry by Stores/Buyer</u> <u>PR Entry via MRP I</u> <u>PR Entry via ROP</u> <u>PR Entry via Kanban</u> <u>PR Entry via SelfService</u> <u>Inquiry Process</u> RFI/RFQ/RFP Entry Supplier/Item Registration Inquiry Entry Send Inquiry/RFQ/RFI/RFP Quote Entry Quote Comparison <u>Procurement Process</u> Supplier/Item Selection PO Entry/Shortclose/Amendment PO Approvals <u>Purchase Order Print/Send</u> <u>Import Document Preparation</u> LC Entry <u>Import document Printing</u> <u>Bill Passing Process</u> <u>Purchase Invoice Entry</u> <u>Transporter Invoice Processing</u> Purchase Invoice Approvals <u>Purchase Reports</u> Pending PO Delayed deliveries Open/Closed PR/PO/RFQ/LC etc. Amended/Shortclose POs Compare Supplier Quotes Supplier Ratings Top10/Last10 Suppliers/Items	Stores/Bin Creation <u>Stores Inward Process</u> <u>DO Entry against PO</u> <u>DO Entry via Weighbridge Inward</u> <u>DO Entry via barcode</u> <u>Incoming Quality Control</u> IQC Reject reason Masters IQC Entry against DO Samples IQC as per attached QC Sheet Entry of outside Lab reports IQC Approval <u>Inwards Stock Posting</u> <u>Stock Card Posting</u> <u>GRN Printing</u> <u>Rejection Note Printing</u> <u>Stores Outward Process</u> Material Req from MRP II Manual MR Entry MR Entry via Self Service Material Issue Entry Material Issue via Weighbridge Material Issue via BarCode <u>Outward Stock Posting</u> <u>Stock Card Posting</u> <u>MRN Printing</u> <u>Stores Reports</u> Bin/Stock Card Stock Valuation Ledger (<u>FIFO / LIFO / Weighted Average</u>) Stock Movement Stock Aging Stock Classification (<u>ABC/FSN/MNS</u>) Materials below ROP Level Material required as per MRP Subcon required as per MRP IQC Rejection report Supplierwise Rejection reports Consolidated and storewise views	<u>Accounts Master Setup</u> Accounts Year Setup Accounting Tree Finalization Cost Center Tree Finalization Register / Annual Report Setup <u>Income Processing</u> <u>Invoice Posting/Voucher entry</u> <u>Pending Payment List</u> <u>Payment Aging</u> <u>Payment Reminders</u> <u>Receipt Voucher Entry</u> <u>Receipt Printing</u> <u>Expense Processing</u> <u>GRN Printing</u> <u>Payments voucher Entry</u> <u>Expense voucher Entry</u> <u>Cheque Printing</u> <u>General Accounting</u> C/N/D/N/JV Entry <u>Contra Voucher Entry</u> <u>Intra Company Voucher Entry</u> <u>Asset Depreciation Posting</u> <u>Bank Reconciliation</u> <u>Year End Posting</u> <u>FOREX Accounting</u> <u>Forex Gain/Loss Entry</u> <u>Interest Accounting</u> <u>Interest calculations & posting</u> <u>Taxation Accounting</u> Tax Voucher entries <u>Stock Accounting</u> <u>Stock Valuation</u> <u>FIFO/LIFO/Wtd.Avg.</u> FG/WIP/RM Stock posting <u>Accounting Reports</u> TB/BL/PL/CashFlow/FundFlow Cost Center / Ratio Analysis Daybook/Ledger/Register/Statement News Paper Balancesheet (SEBI)	Tax Compliance Calender setup Tax Structure Setup <u>Tax Master Setup</u> CST/VAT/GST Master Setup Professional tax setup IT TDS Form 16 Setup Perks Setup <u>Tax Computation</u> for VAT/Excise/FBT/TDS/CST <u>Tax Payment Entries</u> Tax Challan Entry Form 16 Declararion Entry Tax Payment via Challan <u>Online via EFT or via cheque</u> <u>Returns Printing</u> CST/ VAT Returns (22 states of india) Excise Returns Printing TR6 Service Tax Returns Printing FBT Returns Printing TDS Form 16A Printing TDS Form 16 Printing Electronic returns filing <u>PF/Graduity/ESIC Processing</u> Submit - Form 5, 10, 12, Challan PF Statement Form 12A, 3A, 6A Form-9, 9 - Revised Form - 7, 10C, 19, 2 Form NSSN(New Account Opening) <u>Legal Management</u> Case History Case Status Register Judgement Register Daily Board Legal Documents Management <u>Company Law Management</u> Registration Process Ongoing Statutory Process Delisting/deregistration process
14. Powered by SoftRobot Technology.						
Standards followed	CRM		INCOTERMS	SCM	Tally/SAGE/Peachtree	GOVERNMENT
Insurance Company						



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Soft Robot
Codeless Software Development

"YOU MUST **BE** THE CHANGE YOU WISH TO SEE
IN THE WORLD." - Mahatma Gandhi

7	8	9	10	11	12	13	14
Services	HR-Human Resource	Payroll	QMS	Training	Front Office	SelfService	BI-Business Intelligence
Manager / Executive	Manager / Executive / HOD / Candidate	Manager / Employee / HOD	Manager / Executive	Manager/Tutor/Delegate	Receptionist/SecurityGuard	All Users	Directors
SERMR / SEREXEC	HRMGR / HREXEC / HOD	PAYMGR	QMSMGR / QMSEXEC	UNIV/TUTOR/DELEGATE	SECURITY	ESS/Customer/Supplier/W	DIRECTOR
Service Masters	<u>Organization Tree Setup</u>	Holiday Calender	<u>ISO Standards</u>	<u>Training Resource Setup</u>	<u>Document Management</u>	<u>Employee Self Service</u>	<u>Information Trees Drill down</u>
Service Charge Master	Company	Shift Setup	ISO Process Matrix	Setup Training Program	I/O Document Scanning	My Password Change	Sales Organization Tree
Technician Master	Department	Shift Master Entry	Quality Policy	Setup Course Units for Program	Inward Document Entry	My Leave Applications	BOM/Process/Costing Tree
ASP-Auth Service Provider	Designation	Auto Shift Plan Generation	Quality Manual Enter/Print	Setup Tutor Master	e-delivery /filing to user	My EGLC Applications	SupplyChain Tree
DSP-Distributor Service Pro	<u>Access Rights Setup</u>	Edit/View ShiftPlan	Quality Procedure Enter/Print	Setup Tutor Course Activities	Outward Document Entry	My OD Visit Applications	EmployeeOrganizationTree
ASP Area Master	Posts / Users creation & reports to whom?	Departmentwise ShiftReport	<u>NCR-Non Confirmity Report</u>	Setup Tutor Charges	Courier/Post of outward doc.	My Claims Applications	AccountsTree
ASP/DSP Infrastructure	PostGroup Folder rights setup mapped to Posts	<u>OT Process</u>	InProcess NCR	Tutor prepares training material	<u>Visitor Management</u>	My Loan Applications	Department/Process Tree
<u>Daily Service Activity</u>	<u>Recruitment Process</u>	Enter OT Requisition	Customer Complain NCR	Tutor published training material	Visitor Photo Capture	My Personal Records	<u>Activity based Costing</u>
Service Call Entry	<u>HR Requisition by HODs</u>	Enter OT Plan	FMEA-Risk Recording	Publish Course FEE Structure	Visitor Record Entry	My Attendance Records	Employee/Process/Dept.
Warranty Check	<u>Biodata entry via website/offline</u>	Approve OT Plan	Audit Schedule	<u>Delegate Enrollment/Admission</u>	<u>Goods Inward/Vehical Entry</u>	My Payslip Records	<u>Dashboards</u>
Technician Feedback	<u>Interview Call Letter/email/sms</u>	<u>Leave Process</u>	Audit Checklist	Setup Delegate/Student Master	Visitor Approval from user	My Displine Notices	Marketing / Commercial
Service Payment Claims	Interview Assessment Form	Setup LeaveType/LeaveRecord	Audit Reporting	Setup Course Units for Delegates	ID Card / Batch Preparation	<u>Employee Personalization</u>	Engineering / Planning
Claims Payment Processing	Candidate Selection	<u>Leave Entry VIA Self service</u>	Management Review MOM	<u>Delegate Financial control</u>	Outgoing Visitor/Vehical Entry	My Documents from outside	Purchase / Stores
<u>Goods Claims process</u>	<u>Offer letter Printing/emailing</u>	Leave Encashment Entry	6-Sigma Standards	Delegates Fees Shedule	Visitor Reports	My Visitors	Production / Warehouse
Indent Entry	<u>Appointment letter Printing/emailing</u>	<u>Leave Approval via email/online</u>	6-sigma Parameter/Baseline Setup	Delegates Fees Collection	<u>Asset Management</u>	My Chat/Email/SMS manager	Accounts / Statutory
DO Entry	<u>Employee Management Process</u>	Print Leave Records	Find Sigma Level	Delegates Fees Receipt print	Asset Classification entry	My Internet Phone Dialer	HR / Payroll
Sales Return Entry	<u>Employee joining/creation</u>	Calender based Leave Report	<u>CMMi Standards</u>	<u>Tutor Financial Controls</u>	Asset Depreciation entry	My Personal Folder	QMS / KPI / 6-Sigma / IT
Salvage Entry	<u>Employee Job/Reporting History</u>	<u>Attendance Process</u>	<u>CMMi Project entry</u>	Tutor fees payments	Asset Labelling	My Work Wizards	Front office / Self Service
Scrap Entry	Employee card /kit making/issuing	Copy Shift/Holiday/Leave/OT	<u>CMM Project Size Entry</u>	Tutor Account statements	Asset Transaction Log	My TimeSheet/DailyReports	<u>Approval Alert/Work escalation</u>
Repairs Entry	<u>Orientation Training Process</u>	Attendance transfer from machine	<u>CMM Project Payment Schedule</u>	<u>Delegate Training</u>	Asset valuation reports	My AddressBook	<u>based on time or amount</u>
Returns Entry	Prepare Skill Competancy Matrix	Set Intermediate Holiday weeklyoff	CMM Project Reports	Training calender publish	<u>Straight line or WDV Method</u>	My IOMs/Tasks	Quotation
Replacement Entry	<u>Issue Employee Kit</u>	EGLC Entry via Self Service	<u>Change Management</u>	Online Training accessright given	<u>Attendance Management</u>	<u>My Company Specifics</u>	Sales Order/Invoice/Voucher
Credit Note Entry	<u>Performance Appraisal management</u>	LateComing/EG Report	<u>Change Request</u>	Training record updated	<u>via RFID or Biometric machine</u>	My Purchase requisitions	PR / PO / PI / Purchase Voucher
Service e-tickets	<u>Self Appraisal forms entry via self service</u>	Muster roll	Change Approval	<u>Assignment Processing</u>	Employee Attendance	My Training Requests	Payments
Issue e-tickets	<u>Balance Scorecard and 6-Sigma based appraisal</u>	Attendance card	Change Work done reporting	<u>Tutor Sends to delegate</u>	<u>Security Guard Attendance</u>	My Ideas Contribution	All Vouchers
Deliver as per e-tickets no.	<u>Promotion management</u>	<u>Payroll Process</u>	Projectwise/Employee wise perform	<u>via Tutor Portal</u>	Sweeper/Cleaner Attendance	My Marketing Leads/Inquiries	HR Requisition
<u>Via Service selfservice</u>	Promotion Letter Printing	Paystructure Setup	Change Management Cockpit	<u>Delegate sends to Tutor</u>	Trainee Attendance	My Work Plan / Schedule	Appointment Letter
Customer access delivery time	<u>Exit Interview Process</u>	Salary Breakup Setup	<u>Performance Measurements</u>	<u>via Delegate Portal</u>	Consultant Attendance	My Quality Policy/Objective	Exit Interview
Customer access repair costs	<u>Exit Interview form filling</u>	Generate Monthly Transaction	KPI Standards Entry	<u>Exam Processing</u>	<u>Attendance Card Management</u>	<u>Customer Self Service</u>	Training Requisition
<u>Service Reports</u>	<u>NOC Approval from all dept. heads</u>	Create Payslip	Key Performance Indicator Reports	<u>Online exam prepared</u>	ODC-OnDuty Out card issue	<u>My Quotations</u>	Leave / OT / Claims Approval
Complain Register	<u>Relieving letter printing</u>	Post Earnings/Deductions/TDS	Balance ScoreCard Preparation	<u>Delegate takes on Exam</u>	ALC-Authorized Latecoming card issue	<u>My Order Acknowledgements</u>	Payslip
Call Re-imbusement	<u>Service certificate printing</u>	Edit Payslips for corrections	Balance Score Board reporting	<u>Exam results published</u>	AEL-Authorized early going card issue	<u>My Sales Invoice</u>	Discipline Notices
Area Sheet	<u>Settlement terms entry</u>	Create Provisions for Bonus	Skill Matrix preparation reporting	<u>Skill Matrix Updated</u>	NDC-Night Duty Card issue	<u>My Account Statement</u>	<u>Mobile Phone access</u>
Infrastructure Register	<u>Settlement report to accounts</u>	Payslip Printing	<u>Quality Management</u>	<u>Certification Process</u>	<u>Network Access Management</u>	<u>Supplier Self Service</u>	Sales daily/weekly/monthly
Stock Register	<u>Employee Welfare management</u>	Employee Pay Info	Incoming QC	Certificate Prepared	Single Folder access locks to users	<u>My RFQs / Quotes</u>	Purchase daily/weekly/monthly
Faultfound R1 Report	Canteen management	Salary/Wages Register	Line QA from Suppliers	Certificate Printed & laminated	Internet access control	<u>My Purchase Orders</u>	List of Pending Approvals
Defective Tag Report	Family Holiday management	Bank Statement Printing	Outgoing QC	Certification cerimoney planned	Application access controls	<u>My Payments</u>	KPI-Key performance indicators
GRN/RRC Report	Educational Business Trips	Professional Tax Statement	<u>Special Manufacturing Practices</u>	Invitation letter for cerimoney	Computer access controls	<u>Candidate Self Service</u>	6-Sigma CTQ Performances
Indent Print	Clothes and Safety equipment management	TDS Income Tax Statement	Lean Manufacturing	<u>Certificate Issued to Delegate</u>	ERP access controls	<u>Biodata Application</u>	Top 10 / Last 10 reports
COPC	P-CMM	Government	ISO/6-Sigma/CMMi	P-CMM	ISO 27000	e-Business	BI

E-Commerce SoftRobot

Manager

ESALES

Retail POS-Point of sales

Barcode based entry

Sales Invoice Printing

Payments entry

Kiosks based Ordering

Touch screen entry

ideal for FMCG items

ideal for temples or public places

Auction/Bid on net

Enter Auction

Enter Bid

Compare Bid

Award highest bidder

Payment gateway

e-Comm Ordering

Product Selection

Shopping Cart

Payment gateway

Recurring Order

Setup Recurring Order

Time based order entry

Mobile Order

Enter Order from mobile phone

for restaurants/retail chains

Hand Held Order

Enter Order on hand held

Print Invoice

ATM based payments

ATM Salary payment

ATM Supplier Payments

Information Kiosks

Product information

ideal for Construction cos.

E-ticketing Systems

For Service calls

For Train/Air etc. travels

For Visitors

VOIP based systems

Webinars/Webex/Webtrainings

e-Commerce

Programmer

ADMIN / IMPLEMENT

Application Management

Create Application

Open/App/OffHold/Closed/Reject Folders

Edit Application

Add Fields, Folders, Documents, rights

Delete Application

Forms Management

Create Forms

Master/Ma-Detail/SingleMa-multidetail

Delete Forms

Reports Management

Create Reports

Pre-printed or template based

Tabular, Columnar, Folder, Linked, DTS

Create Email Reports

Create Cockpit reports

Create Alert reports

Create KPI reports

Create 6-Sigma reports

Delete Reports

WorkFlow Management

Create UserGroups

Create Users

Assign Users to UserGroups

Assign Folder to UserGroups

Company Management

Create Module/Department

Create Sub-Module/Process

Create Document

Create Folder

Wizard Management

Create Wizard

Run Wizard

Database Management

Create/Backup Database

Create/Modify Table/Views

Create/Modify Structure/Triggers

SQL Server Management

via Enterprise Manager Studio

CMMi