



## **Enterprise Software Benefits**

There are many benefits of Enterprise software, which include improved productivity, increased efficiencies, decreased costs and streamlined processes.

Enterprise software includes CRM, ERP and SCM.

In today's business world, where the quantum of business is too large, enterprise software is the one of the key factors that sets the business operational functions on and going.

The term denotes computer software with a multi-disciplinary approach, from accounting, billing, and order processing to security system of the enterprise, that runs the whole computer-based business house.

Unlike individual or small business concerns, here the parameters dealt are so vast in number that the management resorts to the various enterprise software to integrate the activities within their concern and also to co-ordinate with other business groups as well as their valuable client network.

Enterprise software, also known as enterprise application software has evolved leaps and bounds since its inception around the 1990s and today the entire world of business processes is run by large business establishments with the aid of enterprise software.

# The need for enterprising software

By developing specific-purpose-oriented software, the enterprises stand to gain through increase in business logic functionality as well as productivity.

Be it large industrial houses, schools, multi-specialty hospitals, governmental agencies, retailers or other business groups, the functioning in general will be based on specific modules or systems which should essentially be addressed.

Enterprise software offers computer-based business tools such as:

- CRM (customer relationship management),
- BI (business intelligence),
- ERP(Enterprise Resource Planning),
- Human Resource Management,
- Online Payment Processing,
- Automated Billing Systems,
- Enterprise Content Management,
- IT Service Management,
- Email Marketing System, Call Center Support System, etc.

## Competitive Advantage

It's true that ERP implementations require a major investment, but there's also an even bigger cost in not making the investment. While some manufacturers choose to stick to the tried and true methods of the past, others seek technology solutions.

Manufacturers cannot afford to put off an ERP implementation while their competition invests in ERP and starts reaping the many benefits we'll touch on below.



## Improved Process Efficiency

An ERP solution eliminates repetitive processes and greatly reduces the need to manually enter information. The system will also streamline business processes and make it easier and more efficient for companies to collect data, no matter what department they're working in.

## **Accurate Forecasting**

Enterprise resource planning software gives your users, and especially managers, the tools they need to create more accurate forecasts. Since the information within ERP is as accurate as possible, businesses can make realistic estimates and more effective forecasts.

## **Department Collaboration**

Nobody wants to run a siloed business with each department functioning separate from the other. Collaboration between departments is a crucial and often necessary part of the business. With the data entered into ERP systems being centralized and consistent, there's no reason why departments can't work together. The software also touches on almost every aspect of a business, thus naturally encouraging collaborative, interdepartmental efforts.

## **Scalable Resource**

Did you know? Structured ERP systems allow the addition of new users and functions to grow the initially implemented solution over time. When your business is ready to grow or needs more resources, enterprise resource planning software should be able to facilitate that growth.

## **Integrated Information**

No more issues with data spread across separate databases; all information will be housed in a single location. This means you can integrate platforms like your CRM software with the ERP system, keeping data consistent, accurate, and unique. Know your customer, their orders, and your inventory, all in one place.

## **Cost Savings**

With one source of accurate, real-time information, ERP software reduces administrative and operations costs. It allows manufacturers to proactively manage operations, prevents disruptions and delays, breaks up information logjams and helps users make decisions more quickly. If you've chosen the right solution for your business, and the right vendor who meets your needs, you're bound to see a powerful ROI.

## **Streamlined Processes**

As manufacturers grow, their operations become more and more complex. Manufacturing software automates business operations cross-departmentally, providing accurate, real-time information to everyone utilizing the solution. ERP increases efficiency and productivity by helping users navigate complex processes, preventing data re-entry, and improving functions such as production, order completion and delivery. Streamlined, efficient processes throughout.

## **Mobility**

An advantage of ERP solutions is having access to a centralized database from anywhere you work. Home, office, wherever, through our mobile-friendly solution and application.

## **Customized Reporting**

ERP software helps make reporting easier and more customizable. With improved reporting capabilities, your company can respond to complex data requests more easily. Users can also run their own reports without relying on help from IT, saving your users time to use toward other projects.

## **Increased Productivity**

Save time and increase productivity levels. Sound too good to be true? It's not with ERP software. By having redundant processes automated, users have more time to work on other pressing projects and tasks. They'll also be able to work easier since the solution was designed for ease-of-use.

## **Regulatory Compliance**

A benefit of ERP software which sometimes goes unnoticed is how it ties well into regulatory compliance in the manufacturing industry. Powerful ERP solutions will keep track of regulations within the industry and monitor changes in compliance.

## **Flexible Systems**

Modern ERP software systems are robust, flexible, and configurable. They are not a one-size-fits-all proposition but can be tailored to the unique needs of a business. ERP systems also can adapt to the ever-changing needs of a growing business, ensuring you won't have to buy a new solution once your needs change or your business grows.

## **Customer Service**

It's easier to provide high-quality customer service using an enterprise solution. Sales and customer service people can interact with customers better and improve relationships with them through faster, more accurate access to customers' information and history. You'll also have access to marketing automation and contact center software, ensuring your customers are being interacted with consistently.

## **Data Reliability**

ERP provides reliable data that can be accessed from different locations (if implemented in the cloud) and through multiple devices including tablets and smartphones. With the ability to update in real time, ERP improves data accuracy and consistency. ERP user data can also have additional security through firewalls and built-in protection resources.

Ready to learn more? Our enterprise solution experts are ready and willing to answer all your questions and help you get started on selecting the right solution for your business.

# Features

## Accounting

Get a real time view of your cash flow. Full fledged accounting module covering every aspect of book keeping.

## HR & Payroll

Manage full employee life cycle right from onboarding, payroll, attendance, expense claims, assets to separation.

## Manufacturing

Effectively maintain and manage multilevel bill of materials, production planning, job cards & inventory.

## Sales & Purchase

Increase productivity and lower costs by managing your sales and purchase cycles, from purchase to sales orders

## **CRM**

Win and retain more customers by optimizing sales process. Track leads, opportunities and send the quotes on the go.

### **Sales Force Automation**

Automate routine sales, marketing, and support functions that take up valuable work time, giving you more time to concentrate on your customers. Create optimized workflows that help you reduce manual data entry, eliminate redundancies, and speed up your overall process.

### **Lead Management**

Capture leads, automate lead scoring, identify leads that will convert, and follow up with detailed contact information.

### **Deal Management**

Close more deals in less time. Track what stage your deals are currently in, and seize every opportunity at the optimal moment.

### **Contact Management**

Get real-time insights about your customers, connect with them across channels, and build strong relationships.

### **Workflow Automation**

Every time your team follows up with a lead or updates a field it requires significant manual work. Learn how to perform these tasks much faster, using workflows.

## **Projects**

Deliver both internal and external projects on time, budget and profitability. Track tasks, timesheets and issues by project.

## **Helpdesk**

Deliver a better service experience with an intuitive issue tracker and integrated knowledge base.

## **Asset Management**

Maintain and Manage details of assets, their movement, value adjustment and depreciation.

## **Website**

Some applications come with a fully featured content management with blogs, web pages and forms.

## **Dashboards**

Create custom dashboards for everything you want to measure. Monitor and visualize your growth.

## **Quality Management System**

Quality management is the act of overseeing all activities and tasks needed to maintain a desired level of excellence in tasks.

A Quality Management System is used to comply with ISO quality standards. The tool eliminates the need for paper records and replaces them with digital records. The application helps service and manufacturing companies to manage day-to-day work and instills full transparency across the system. It helps an organization in making Quality Goals and design Quality Procedures to achieve it.

## **Process Management**

Does your sales team know what to do at each stage in your pipeline? With Blueprints, your sales team can find out the next move to make at any moment. Define your sales process for your whole team to follow.

### **Sales Process Builder**

Bring your offline sales processes into your CRM and make sure all your sales reps follow it at every turn.

### **Processing Rules**

Set up rules in your CRM based on your real-life sales processes. Assign leads to the right sales rep, approve discounts and validate sales data based on your criteria.

### **Review Process**

Get clean data in your CRM. Define a process for your team to review incoming information, and approve or reject it with appropriate comments based on their quality.



# **Omnichannel**

Converse in real time with customers and prospects. Get notified when someone interacts with your brand—whether they're browsing your website, reading an email, or talking about your brand on social media.

## **Email**

Handle email communication completely. Send emails, associate emails to CRM records, and get email insights.

## **Telephony**

Connect your telephony provider to make calls from within the CRM. Schedule calls, get reminders, and save call logs from every interaction.

## **Social**

Monitor what people are saying about your brand online, and automatically capture new leads from social media that aren't in your CRM.

## **Customer portals**

Facilitate prospects with a self-service portal where they can view your products and make purchasing decisions.

# **Analytics**

The more your business grows, the more you need to know. Measure the performance of every sales activity, and break quotas down into achievable targets with the CRM's reports, analytics, and forecasts.

## **Reports**

Real-time reporting gives you insight into a variety of metrics such as sales trends, marketing campaigns, activity reports, and team performance.

## **Analytical Components**

Create dashboards, analyze trends, stay on top of your key performance indicators, and know where you stand on your targets.

## **Capabilities**

Take a look at the different ways analytics can help your business grow by helping you make data-backed decisions.

## **Sales Enablement**

With the right set of tools, your team will never have to struggle. Generate price quotes, and access sales scripts. Permit your customers, vendors, and partners to view, add, or edit information through portals from within your CRM saving your team time and effort.

### **Quotes and Finance**

Generate quotes, invoices, and orders with access to inventory, shipping, and subscription information.

### **Partner Portals**

Grow your business by giving partners access to create and nurture leads, manage inventory, and view their contacts.

### **Calendar**

Access all your calendars from one system. Prioritize meetings with multiple reminders and convert them into recurring events by checking a box.

## **Performance Management**

Accelerate your sales team's productivity with accurate forecasts of potential revenue, and make use of productivity games to exceed your sales quotas. You can categorize customers quickly, set up multiple currencies, use AI predictions to prioritize leads and deals likely to convert, and track website visitors to convert more prospects.

### **Forecasting**

Make more accurate forecasts. Predict future sales, and measure them against current sales.

### **Territory Management**

Categorize customers based on relevant criteria and assign the right sales reps to reach out to them. Exceed quotas with region-wide sales insights.

### **Gamification**

Encourage your team to exceed sales quotas by awarding badges and trophies when tasks are completed.

## **Marketing Automation**

Get your marketing and sales teams on the same page. Generate new leads, execute targeted email marketing campaigns, and compare ad spending to sales revenue with the Google Ads integration.

## **Customer Segmentation**

Segment your contacts and target them with personalized campaigns to improve engagement, retention, and ROI on marketing campaigns.

## **Lead Nurturing**

Strengthen your relationship with your leads by nurturing them with relevant content at every stage of your funnel.

## **Google Ads Integration**

Compare your Google Ad campaigns against sales to monitor your spending and determine which campaigns are working and which aren't.

## **Event Management**

Use CRM to communicate with event attendees, send invites to your contacts or leads, and connect with new leads that you've collected from the event.

## **Security**

Your security is our top priority. We understand that every organization needs to strike the right balance between protecting their customers' data and giving employees the freedom to get their work done. Our systems meet both of these requirements.

## **Roles, Profiles, and Teams**

Assign roles for users, define permissions, and control access to information in the system.

## **Data Security**

With comprehensive data security features, protect both your data and your customers' from unauthorized access.

## **Compliance**

Ensure your data collection and sales process is compliant with privacy regulations using our comprehensive set of compliance features.

# **Logistics**

## **3PL Management**

3PL is a service that allows you to outsource operational logistics from warehousing, all the way through to delivery, and ultimately enables you to focus on other parts of your business.

Third-party logistics companies provide any number of services having to do with the logistics of the supply chain. This includes transportation, warehousing, picking and packing, inventory forecasting, order fulfillment, packaging and freight forwarding.

## **Barcoding/RFID**

## **Cross Docking**

## **Fleet Management**

## **Inventory Management**

## **Order Management**

## **Shipping Management**

## **Supplier Management**

## **Transportation Management**

## **Inventory Management**

Manage inventory at multiple levels: bin location, product, lot/serial number, and expiration date

- Manage multiple facilities across multiple regions

- Manage bin locations and bulk storage areas within each storage facility

- Make adjustments to quantity and bin location during inventory activities

- Track reasons for adjustment (i.e. expiry, damage, loss)

- Export suggested cycle count for each location based on last inventory date

- Remove quantity from inventory due to expiry, damage, or recall

## **Electronic Stock Card**

Our system supports any type of item including, but not limited to, medications, medical supplies and devices, office supplies, and building materials. In addition, the software can be used to track the location of fixed assets like automobiles, IT equipment, and hospital furniture.

Store metadata about each item, including cost, suppliers and manufacturers, category/classification, and substitutions.

Create custom attributes for temperature requirements, hazardous material class, and import/export requirements (e.g. for controlled substances).

View quantity on hand within each inventory location by bin location, lot/serial number, and expiration date

View stock history including debits, credits, and inventory adjustments

## **Stock Movements**

Intuitive workflows to manage movement of stock from a supplier to depot, from depot to depot, and from depot to consumption location.

- Ability to base a stock movement on a preset stock list (i.e. monthly replenishment)

- Ability to edit quantity in stock movement based on availability of stock

- Ability to keep track of original request to inform forecasting

- Ability to act on suggested substitutions during stock movement workflow

- Automated picking based on first-expiry-first-out (FEFO) algorithm

- Ability to export and print picklist

- Ability to pack items by pallet and box

- Ability to add stock movement metadata including date, tracking number, comments

- Ability to export packing lists and customized customs clearance documentation

- Ability to upload and store other documentation

## **Inventory Tracking**

Adjust inventory quantity and remove quantity due to expiry and damage.

- Track lot/serial number and expiration date through workflows, including automation based on FEFO during picking

- Easily identify affected inventory in the event of a recall

- View and export dashboard reports on expiring stock

- Access information about incoming shipments and pending outgoing shipments for each item by location

## **Dashboard**

Useful indicators to help inform stakeholders on important decisions that need to be made and advise users on what they need to work on next.

Stock value

Inventory summary

Bin location summary

Expiring stock summary

Fast movers

Global search

Product tags

Recent activities

## **Flexible Location Hierachy**

Organize and manage stock within multiple facilities, thousands of bin locations, receiving and staging area, supply closets, etc

Location Groups (geographic region)

Location (facility, storage area, room, closet, locked cabinet, crash cart)

Internal locations (bin location, receiving area, staging area, cross-docking, bulk storage)

## **Reporting**

Supports utilization and request (demand) tracking; Includes out-of-the-box reporting features for planning and warehouse management; Customized reports and integration with other software can be developed

Dashboard Indicators

Consumption Report

Stockout Report

Expiration Report

Transaction Report

Stock Analytics

Quantity On Hand Report

## **Security**

Assign permission levels by role

Auditing of user actions, includes automatic created & updated timestamps for all major transactions

Multiple roles available (Superuser, Manager, Read-only)

User access can be restricted by location

Ability to authenticate using directory service (i.e. LDAP)

Configuration of user roles and permissions (coming soon)

# Insurance

QUOTE & BUY - Online, direct to market policy sales

RATING ENGINE - Powerful, flexible & fast

PROPOSAL FORMS - Dynamic, user friendly & configurable

EXCEL RATING SHEETS - Configure rating rules using Excel

QUOTE AGGREGATION - Compare quotes from many providers

SINGLE QUOTE - Provide quotes from an individual provider

PREMIUM COLLECTION - Integrate with a wide range of payment providers

MOBILE READY - Serve the mobile market as well as the traditional

PRODUCT DEVELOPMENT - Develop & tailor you own product lines

GENERAL LINES - Supports general lines insurance

COMMERCIAL LINES - Supports commercial lines insurance

NICHE PRODUCTS - Deliver niche products efficiently

REFERRAL MANAGEMENT - Process referrals quickly & efficiently

DOCUMENT TEMPLATES - Template policy documents using PDF Forms

ISSUE DOCUMENTATION - Automatically issue documentation

LOCALIZATION - Support multi language & currency

REGIONAL TAX - Configure regional insurance tax requirements

SERVICE INTEGRATION - Designed to integrate with back office & third party services

BORDEREAU REPORT - Generate bordereau reports quickly & easily

A bordereau is a report prepared by an insurance company for a reinsurance company detailing either the assets that are covered in part by the reinsurance firm or the actual claims that have been made for damage to property protected by a contract between the two companies.

REPORTING AND MI - Realize reporting & management information requirements

USER DASHBOARD - Customisable user dashboard

B2B - Deliver products through agents

B2C - Deliver products direct to market

DATA MANAGEMENT - Powerful, flexible data management & export

DATA ANALYSIS - Collate point in time data for analysis

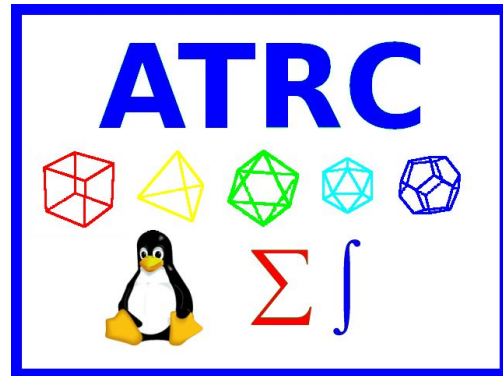
COMBINE DATA SOURCES - Analyze multiple sources & types of data



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