Erpisto
ERP & CRM WITH ANALYTICS

"Erpisto ERP and CRM solutions provide a broad cross section of employees the information they need to optimize the operations, Sales and every single aspect of our business. We have 500 retail points being managed by 6 operator companies who are working with us round the clock. Erpisto helped us to manage the automation of whole business process in cost effective ways. I personally like the mobile applications providing alerts and transactional capabilities on the go."

Kirk D. Cruz (Business Development Manager)

Al Jomaih and Shell Lubricating Oil Co. Ltd., Riyadh

Overview

Al Jomaih and Shell markets and sells Shell lubricants in the assigned boundaries of the Kingdom of Saudi Arabia. The company owns state-of-the-art Lube Oil Blending Plant in the city of Riyadh. The plant produces the world class Shell lubricants. Apart from blending lubricants locally, the company also imports special lubricants from Shell plants throughout the world.

Al Jomaih and Shell started its business operations in 1985. They have 500 Retail points for Oil change located Country wide which are connected to each other via secure network. 6 Operator are companies managing Retail Points on behalf of Shell. They need an ERP and CRM solution with analytics and Smart promotions with broadcasted SMS option embedded in ERP solution.

Situation- Need of ERP Solution

Management of Al Jomaih and Shell is looking for an ERP system which can replace the Financial and Human Resources/Pay systems with an integrated software suite. They needed an ERP and CRM software which can offer functionality in many areas, including Human Resources/Payroll, Financial, Budget and Materials Management Services. Their overall goal is to get an administrative software system that improves services to Organization.

Al Jomaih and Shell wants to improve their financial management, reduce paperwork and manual effort, and shorten response times. They are in need of an integrated foundation that will allow users to merge transactions and prepare reports through a Desktop Application which can offer secure access to financial information at any time, from any location having internet connection. Main activities of procurement, accounts payable, journal entries, budget development, sponsors, and accounts receivable management needed to be addressed appropriately. All activities in these areas needs to be updated in real time.

Key issues that Shell management was facing were:

- Effective Management of Oil change Retail points
- Effective Management of Operators
- Inventory management
- Analytics and Active Alerts
- Online Appointment System Integrated with ERP
- E-marketing of Retail Points using social channels

The Dashboards and analytics is needed to benefit the organization by improving access to information, integrating with the financial system, decentralizing data entry and reporting, minimizing duplication and, above all, lowering the risks stemming.

Solution

Erpisto offered a single and affordable solution for managing the entire business, including financials, sales, purchase, Inventory, manufacturing, Human Resources, Customer Relationships and operations. It streamlines end-to-end operations, gain instant access to complete information via Mobile & Web based Alerts, Notifications & Dashboards, and accelerate profitable growth and ensure quality customer relationship. Erpisto is a user friendly application with special emphasis to improve the productivity and efficiency of your business processes. Erpisto is also equipped with a number of special features and functionalities which help in enhancing the organizational capability and capacity.

Erpisto ERP is implemented with all standard modules (HRMS with complete recruitment and payroll, Finance with payable receivable and fixed assets, sales and purchase management, vendor management, dashboards and analytics, mobile applications for real time transactions, active alerts module, distributor management, production and discrete manufacturing)

CRM is implemented with (complete CRM sales cycle including Leads, Opportunities, Accounts, Contacts, Sales Orders, Quotations, Purchase Orders, Campaign Management, Dashboards and Alerts, Leads Scoring and Opportunity Pipeline management, smart mobile application for cross platforms).

Online Appointment System is implemented which includes Website and E-Marketing for Shell to attract customers to new Retail points.

Outcome of the Solution
Erpisto Modules

Accounting and Financial Management

Point of Sales

Purchase and Vendors Management

Manufacturing and Inventory Management

Sales and Customers Management

HR and Payroll Management

Erpisto Key Features

- Completely based on Microsoft Platform
- Short Implementation Cycle
- Tight Integration of all Modules
- Flexible Coding Structures
- Multi Companies Support and Consolidation
- Multiple Currency handling
- Electronic Authorization
- Invincible Security System
- Budget Checks and Controls
- Flexible Document Sequences
- Multiple Accounting Calendars
- User Defined Customizable Fields
- Recurring Transactions
- Drill Down Functionality
- Audit Trails and User Logs

- Advance Worksheet Support
- Graphical Web Reporting
- 3-Way Transaction Matching

Dashboards & Reporting

Erpisto has very interactive high level Performance based Dashboards, and they are fully customizable. It also provide reports in various mods with multiple export options including, Excel, PDF, HTML, Image, RTF, CSV, Text and MHT.

Key Areas of Reporting

Key areas for reporting in Erpisto are:

Profit and Loss (P&L) Analytics

Customer wise profit, Product wise profit, Total products profit, Date wise profit

Balance

Product wise balance stock, total product wise balance stock, Balance stock and its value

Vendor

Updated stock from vendors/principal, Total business given to vendors/principals or total stock purchased from vendors/Principals, Product wise given business to vendors or total product wise purchased from vendors/principals, Total credit taken from vendors/principals.

Customer

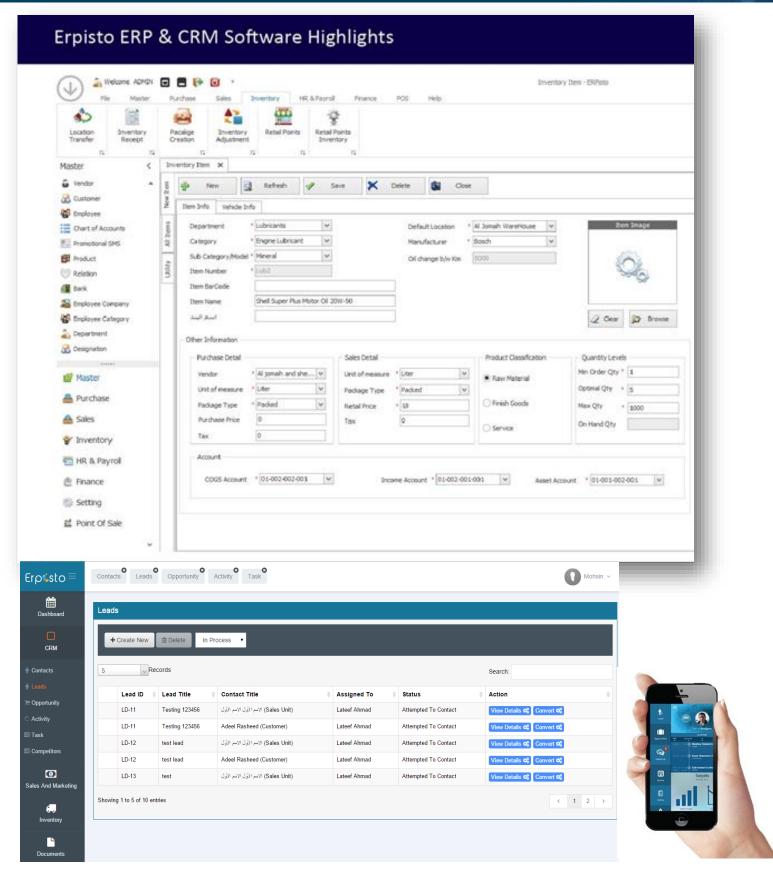Total credit given to customers, Total cash collected from the customers, Customer wise cash collection

Miscellanies

Total expense during current month in the form of rents, pays to staff, daily miscellaneous expenses and utility bills, Date wise cash collection, Cash in hand, Profit and loss detail with particular filters.

Erpisto ERP & CRM Software Highlights

Real time decision making with live analytics dashboards

Active alerts and notifications right on your smart phones and browsers

Work Anywhere, Anytime with Erpisto Go Mobile

Accounting and Financial Management

Budgeting & Financial Planning

Sales Management

Customer Relationship Management

Discrete Manufacturing

Enterprise Assets Management

Human Capital Management & Payroll

Inventory Management

Point of Sales

Process Manufacturing

Production

Warehouse Management

Purchase Management

About Bilytica (Parent company of Erpisto)

Bilytica provides right blend of industry knowledge and experience. As industry thought leaders and best-practice judges for over a decade, our consultants are in the know about what top-performing organizations have done to succeed.

Combined with practical consulting experience across a range of industries, this provides with the ingredients that can make the critical difference. Our mission is to guide our clients along the path to impactful uses of information and analytics. Since 2009, Bilytica has been at the leading edge of developing custom business intelligence solutions – leveraging our consultants' deep knowledge of business analytics, data warehousing, business intelligence and performance management – to help a wide range of companies improve their core business processes and increase profitability.

For more details, please visit http://www.bilytica.com/

About Erpisto

Erpisto offers secured cloud and on premises solutions that can easily adapt to your business needs. Erpisto is award winning market leader of providing ERP and CRM solutions supporting multiple languages. We let the client choose the deployment, functionality and licensing option that best fits its requirements.

Erpisto software and business applications are configurable, extensible and it can be easily integrated with other systems. You can integrate with your existing in premise system and can take full advantage from the Erpisto customized solutions. We offer different deployment options which and flexible and they let you switch between different options from time to time without losing security and performance. All the Erpisto solutions are developed using latest technology considering in mind terabytes of data and hundreds of thousands of concurrent users in mind. Erpisto mobile applications enable users to run business from anywhere which makes life easy for all your employees.

For more details, please visit http://www.erpisto.com/