PRODUCT OVERVIEW

(CRM,XRM,ERP)

Bulk Mail

BOM

Client Portal

Tally Integration

CRM

Purchase

Biometric Integration

IVRS

Sales

Marketing

H-Office®
Your Trusted Cloud Office

Mobile App

Purchase Indent

Barcode Generation

Support

Task Workflow

Membership Management

Event Management

www.hofficecrm.com

ABOUT US

Amazing H-Office is a flagship solution by Horus Tech Solutions Pvt Ltd, headed by business consultants and veteran professionals having 25+ years of experience. 30+ developers have worked for 10+ years to nurture this award-winning application. H-Office is powerful CRM (Customer Relationship Management), XRM (extended CRM with Salesforce Automation & Support Automation) and ERP (Enterprise Resources Planning) over the cloud.

We have to cater complex business processes of Indian customers spread across 40+ business vertical by nurturing our application with tons of tools and macro level functionality.

It requires bland of hard work with passion to serve clients by marathon dedication in research, developing and nurturing our application to serve more. Our dedication of service was recognized in the year 2012 by FITAG (federation of all IT Association of Gujarat) by presenting "Best Software Solution Company" award and in the year 2017, "Best MSME India 5000 Company" award, Organised by Benchmark Trust [Audit by TQV].

H-Office has launched more than "Five Core Business Modules" and "35+ Add on Plugging" besides "H-Factory - Manufacturing ERP" to select, on basis of no's of the user's to operate the application to cater personalizes need of any "Product or Service" driven SME industry.

Our Mission :

Our corporate mission is to deliver business automation solutions for various industries and verticals. Our entire team is committed to deliver the best possible value to the client from our gamut of applications.

Our foundation is based on customer centric approach - continuous Improvement with total quality management system.

LICENSING POLICY

01 — **Select Core Module** — Lincesing Apply on per user / per Month

02 — **Select Add on Pluggins** — Lincesing Apply on per Company / per Month

03 — **Select No's of Users** — Lincesing Apply on "Name User Licence"

04 — **Implementation Cost** — Apply on basis of Selected Modules, Custmisation & On site Visits

H-OFFICE IMPLEMENTATION, CUSTOMIZATION & SUPPORT POLICY

Amazing Hoffice ready to use business platform with can be configure to personalized touch based on company profile for available parameters. In case any additional customization requirements found after gap analysis, will be charged extra subject to mutual approval .

Default scope of work include telephonic, email and remote access support.

You may avail chargeable onsite visit for implementation or training.

H-OFFICE
ADVANTAGES

Application hosting reputed data centerin USA

RAID implementation for zero data loss

Well define implementation process

Low cost of acquisition

Global & Mobile accesibility

Premium support

Customization service

END to END solution for - "SME industries"

RAID 3
striping with dual parity across drives

block 1a | block 1b | parity b1 | parity b1
block 2a | parity b2 | parity b2 | block 2b
parity b3 | parity b3 | block 3a | block 3b
parity b4 | block 4a | block 4b | parity b4
drive 1 | drive 2 | drive 3 | drive 4

BENEFIT
OF "SAAS"

Daily Auto back on cloud Server

Global Virtual Office

Paper Less office

Minimum local IT infrastructure require

Open source technologies – Zero Licensing obligations

Highly Secure

Mobile and Tablet accessibility

Scalable Solution

Very High uptime of server

Easy to deploy

BASIC CRM

Contact Management

Product Management

Dashboard & Gadgets

Outgoing Email

Appointment

Document Management

Timesheet

Task Management

Task Templates

Vendor Management

Daily Work Report

CONTACT MANAGEMENT

- Privacy
- Categorigaton
- 360° View
- Contact Relationship Mapping
- Follow up Management
- Label & Envelop
- Notes & comments
- Categorization & Classification

PRODUCT MANAGEMENT

- Privacy
- Categorigaton & Division
- Product Wise Transaction Tracking
- Product Alias
- Product Gallery
- Vendors Mapping
- Product Annexure Mapping

TASK MANAGEMENT

- Dynamic Activity & Sub Activity
- Priority
- Task Templates
- Task Followers
- Copy Task
- Task End Date
- Task Followup

DOCUMENT MANAGEMENT

- Appoval Workflow
- Folder Management
- Privacy
- Version Management
- Notes
- Log

TIMESHEET

- Employee Time Tracking
- Activity Wise Tracking
- Contact Wise Tracking
- Date Wise Tracking
- Charges Calculation

APPOINTMENT MANAGEMENT

- Google Calendar Intrigration
- Dynamic Category
- Dynamic Statu
- Dynamic Types
- Calendar Views & Time Management

OTHER FEATURES

- Dashboard & Gadgets
- Document Custom Fields
- Document Templates
- Electronic Reminders
- Daily Analysis
- Outgoing Email

A forecast from Gartner anticipates that the CRM market will be worth over $40 billion in 2018.

MARKETING AUTOMATION

START

1 PROSPECT DATA IMPORT

Import all your prospect data direcly from your spredsheet

ASSIGN DATA TO TELECALLING TEAM

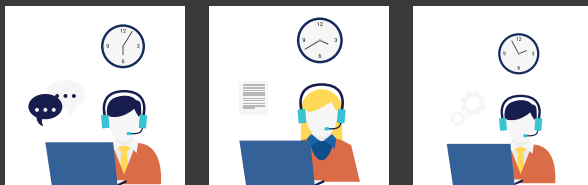You can distribute the data in round robin to all your calling agents

2.1

2.2 CAMPAIGN MANAGEMENT

You can do campaigning such as bulk email and bulk sms

2

LEAD/INQUIRY MANAGEMENT

You can manage stage wise inquaries

3

FOLLOWUPS, MEETINGS & CLOSER

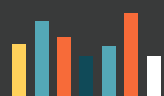Manage followups and meetings with electronic reminders and calender intigration

4

5

Sales Funnel

- LEAD
- QUALIFIED LEAD
- OPORTUNITY
- WON

Outgoing email

Forcasting

MOM

5 MARKETING ANALYSIS

Get tones of analytical reports to take your marketing to the next level

---

CRM are known to improve customer retention 27% to sell to an existing customer than it is a new one.

LEAD AUTOMATION

- Follow up Management
- Auto Revoke Policy
- Lead Custom Field Creation
- Funnel Management
- Sales Forecasting
- Multiple Lead Scripts
- Auto Lead Intimation to Client & Employee via SMS & Email
- Map single or multiple products with their associated custom fields in lead
- Website Inquiry Integration

QUOTATION AUTOMATION

- Lead to Quotation Automation
- Multiple Pricelist Management
- Customer Wise Auto Discounting
- Approval Workflow
- Inline Profitability Analysis
- Single Click Quotation from Custom BOM
- Single Click Copy & Revised Quotation Option
- User Defind Quotation Formats
- Documents, Images, Task and other attachment options
- Terms & Condition, Cover Letters & Product Annexure Dynamic Masters

PROSPECT MANAGEMENT

- Employee Wise Prospect Privacy
- Follow ups Management
- DND Management
- Data Import Tools
- And all other features as same as contact management of basic CRM

CAMPAIGN MANAGEMENT

- Bulk SMS
- Bulk E-Mail
- Telemarketing Automation

MARKETING ANALYTICS

- Source Wise Lead Analysis
- Industry Wise Lead Analysis
- Employee Wise & Team Wise Lead Analysis
- Lead to Invoice Report
- Sales Forcast Report
- Lead Summary Report & Detailed Analytics Report

67% see at least a 10% increase in sales opportunities through lead nurturing

SALES
AUTOMATION

Create, Revise, Copy-Quotation

Create Sale Order / Request for Approval

Create Invoice / DC

Receipt of Payment

Sales Analytical Reports
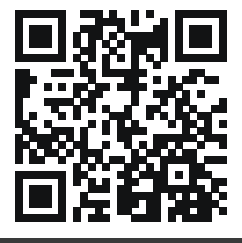
SALES ORDER / INVOICE AUTOMATION

- ✓ Microsoft word integration for format design
- ✓ Proforma Invoice format design option
- ✓ Terms & Condition, Cover Letters & Product annexure dynamic masters
- ✓ One click copy SO / Invoice option
- ✓ Revise SO option
- ✓ Quotation to Sales Order and Invoice Automation
- ✓ Pick List
- ✓ Multiple Price List Management
- ✓ Customer Wise Auto Discounting
- ✓ Real time Order Profitability Calculator
- ✓ Customer & Product wise auto tax applicability
- ✓ Documents, Images, Task and other attachment options
- ✓ Approval Work flow
- ✓ Credit Limit Management (Days & Amount wise)
- ✓ Payment schedule planning & Notifications
- ✓ Delivery schedule planning & Notification
- ✓ Sales Transaction Locking (Contact & Product wise)

DELIVERY CHALAN

- ✓ Microsoft word integration for format design
- ✓ Multiple DC type management
- ✓ Multiple DC printing option (i.e. Original, Duplicate, Triplicate)
- ✓ Terms & Condition dynamic masters
- ✓ Documents, Images, Task and other attachment options
- ✓ DC change log management
- ✓ Sales Order to Sales Invoice Automation
- ✓ Multiple Price list Management

SALES ANALYTICS

- ✓ Quotation, Order, Invoice, DC Register
- ✓ Employee wise sales report
- ✓ Product wise sales report
- ✓ Sales Order pending for Delivery Report
- ✓ Sales Invoice pending for Delivery Report
- ✓ Sales Order pending for Invoice Report
- ✓ Lead to Invoice Report
- ✓ Quotation Analytics Report
- ✓ Sales Order Analytics Report
- ✓ Sales Invoice Analytics Report

Data accessibility for salespeople shortens their sales cycles by 8-14%

SUPPORT
AUTOMATION

Assign To Engineer

Add Update Action

Creat New Support

Integrate Knowledge Management

Creat AMC Contract

Set Approval Workflow

47% of businesses planning to increase spending on the help desk and customer service software.
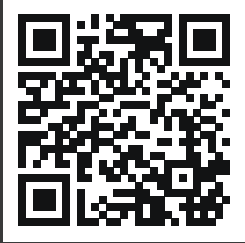
SUPPORT REQUEST AUTOMATION

- ✓ Support request creation based on category & subcategory
- ✓ Request Approval Process
- ✓ Bulk Request Assignment to engineers
- ✓ Event based email & sms alerts for every new request creation
- ✓ Auto update of action by email & sms notification
- ✓ Add followers to Request
- ✓ Customer Satisfaction Tracking
- ✓ Job Card Printing
- ✓ Support History Tracking
- ✓ Dynamic Label for Support Name
- ✓ Request Overdue Management & Auto Intimation
- ✓ Support Workload Automation

SUPPORT ANALYTICS

- ✓ Support Analytics
- ✓ Support Summary
- ✓ Employee Wise Workload Graph
- ✓ DND Management
- ✓ Support Request Status Graph
- ✓ Overdue Request Filter

SOLUTIONS MANAGEMENT

- ✓ Link Solution to Support Request
- ✓ Real Time Solution Viewing & Emailing option from Support Request
- ✓ Tagging & Searching on Keywords of Solutions
- ✓ Linking Solution with Product
- ✓ Create Dynamic Category & Sub Category
- ✓ Multiple Pricelist Management
- ✓ Customer Wise Auto Discounting

CRM software, you are able to create a 360-degree overview of each person you connect with.

PURCHASE
AUTOMATION

PURCHASE ORDER

APPROVED PURCHASE ORDER

GOOD RECEIPT NOTE

PURCHASE INVOICE

PURCHASE RETURN & DEBIT NOT

INVENTORY MANAGEMENT

PO

PI

PURCHASE ORDER / INVOICE AUTOMATION

- ✓ Microsoft word integration for format design

- ✓ Terms & Condition, Cover Letters & Product annexure dynamic masters

- ✓ One click copy SO option

- ✓ Edit / Revise PO / PI option

- ✓ Vendor price list import utility

- ✓ Approval Work flow

- ✓ Purchase Transaction Locking (Contact & Product wise)

- ✓ Multiple type PO / PI printing options (i.e. Pre-Printed, with image, with product wise tax breakup, with grand total and tax summary)

- ✓ Product wise supplier information management

- ✓ Primary supplier mapping for quick ordering

- ✓ Real time Stock on PO / PI & Stock on SO views in PO / PI creation wizard

- ✓ Vendor & Product wise auto tax applicability

- ✓ Documents, Images, Task and other attachment options

- ✓ Payment schedule planning & Notification

- ✓ Material receiving schedule planning & Notification

GOOD RECEIPT NOTE

- ✓ Microsoft word integration for format design

- ✓ Multiple GRN type management

- ✓ Multiple GRN printing option (i.e. Original, Duplicate, Triplicate)

- ✓ Documents, Images, Task and other attachment options

- ✓ GRN change log management

PURCHASE ANALYTICS

- ✓ Purchase Order Register

- ✓ Purchase Invoice Register

- ✓ Material Inward Register

- ✓ Purchase Return Register

- ✓ Purchase Invoice vs GRN Imbalance

- ✓ Purchase Order wise Material Inward Register

STOCK AND INVENTORY

- ✓ **Branch and Company wise stock management**

- ✓ **Stock location tracking**

- ✓ **Stock movement tracking**

- ✓ **Item wise stock minimum–maximum mapping and alerts**

- ✓ **Stock on PO and Stock on SO tracking**

- ✓ **Inter branch stock transfer utility**

- ✓ **Stock opening excel utility**

- ✓ **Manual stock add, open, remove option**

- ✓ **Inventory location import utility**

- ✓ **Dummy goods inventory management**

- ✓ **Purchase time item unit conversion facility**

- ✓ **Threshold stock report**

- ✓ **Stock summary reports (Branch wise, Product wise)**

- ✓ **Stock valuation report**

INDUSTRIES

Traders & Distributors

Service Providers

Marketing Companies

Manufacturer

IT Solution Providers

Charter Accountant

Builders

Interior Designers & Architects

Foreign Education & Visa Consultants

Matrimony

Gym & Health Clubs

Spa & Salon

Real Estate Consultant

Insurance Advisor

Tour Operator & Travel Agent

Membership Clubs

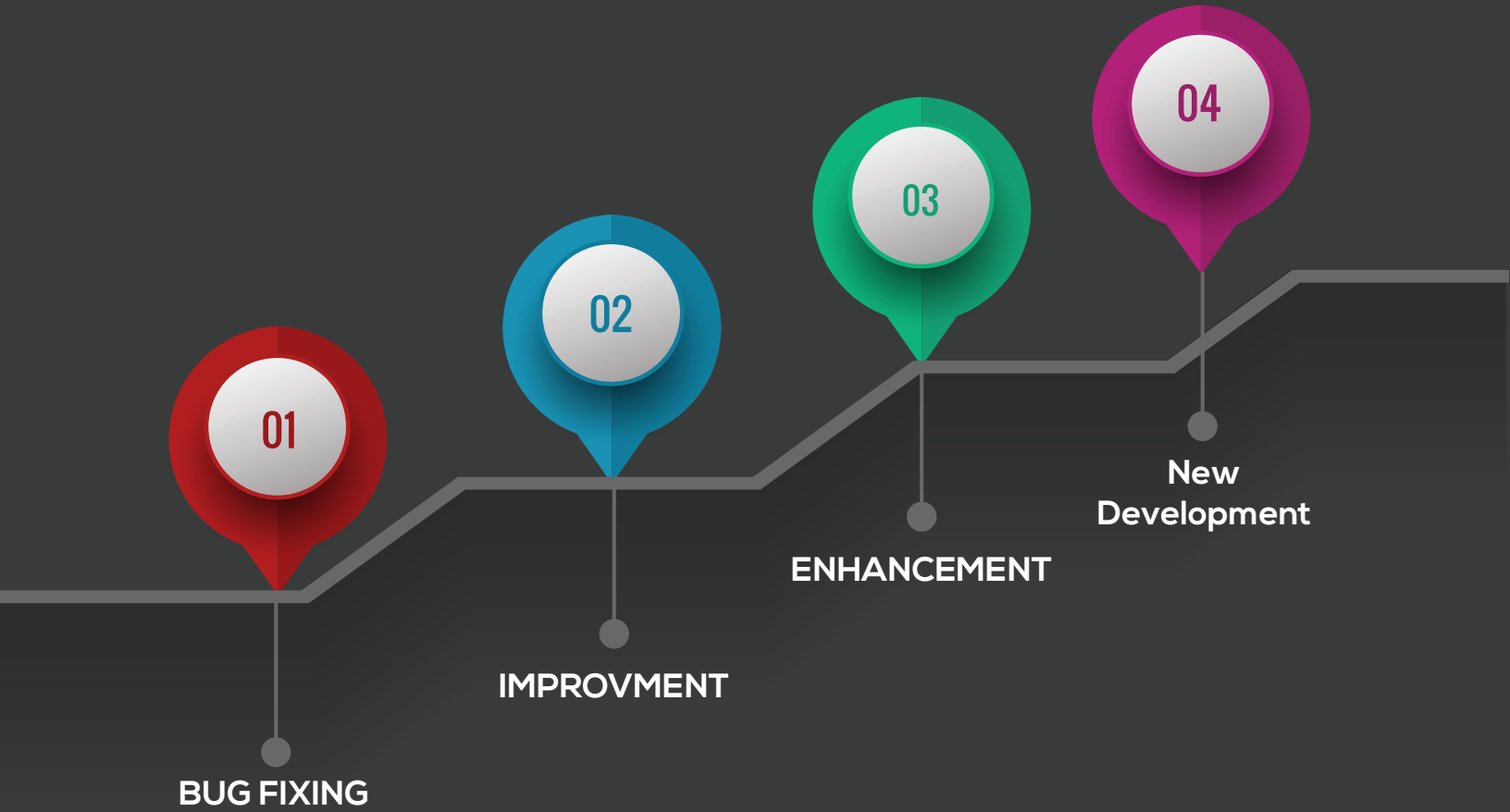Stock Market Advisor

Trade Association

LIFE CYCLE OF
PRODUCT EVOLUTION

At H-Office CRM we listen to the needs of our clients and keep on improving our product functionalities to deliver the modern day and most advanced business tools and technologies to deliver highest possible value to our clients. Our development teams use the most advanced tools, techniques and processes to track and process all development related issues in a structured and well organized manner to ensure the quicker and efficient deliveries of our version updates. We also release the release note every time after we roll out the new system update.

01

02

03

04

BUG FIXING

IMPROVMENT

ENHANCEMENT

New Development

SOME OF OUR PRESTIGIOUS CLIENTS
SERVED OVER 1000 CLIENTS

CLIENTS SERVED

Bombay Chartered Accountant's Society

amneal PHARMACEUTICALS

Amul The Taste of India

ATUL

JOY PUMPS

Duke SAVE ENERGY Pump & Pipe

Gopani

apb ANKIT PULPS & BOARDS PVT. LTD. Bettering Lives
Manufacturer of Microcrystalline Cellulose & Co-Processed MCC

PALM GROUP

collective

CHHAJED Foods Pvt. Ltd. Since 1979

UMA CONVERTER PVT. LTD.
An ISO 9001:2000 & 22000:2005 Certified Company.

श्री TARA

TBW

JKC Total IT Solutions

A.S. Retail & Hospitality Technical Solution Pvt. Ltd.

SYSTEM AUTOMATION

KAMDHENU

PRISM

ACTUNIV GROUP

ASSET INTIGRATED INFO SYSTEMS

GM

SuAyu DOING NUTRITION RIGHT

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INFINITE DREAMS, UNLIMITED EFFORTS

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