

ERP Software



About Company

Scopex is a robust enterprise resource solution software by Scopex Pt. Ltd. It is headed by business consultants and veteran professionals having two decades of experience. Talented developers worked day and night with a passion for inventing unique software. Scopex is a powerful CRM and ERP over the cloud. We cater best-of-breed solutions to various verticals and Industries by nurturing our software with advanced tools and macro-level functionality. Our Applications are a blend of hard work, brilliance, and passion.



Our Mission

Our sole mission is to deliver advanced and agile business solutions and stay at par with the 4.0 industrial transformation. Our service Approach roots for customers, and our entire team diligently works to provide the best business automation solutions and value to the client across various Industries and verticals.



Our Goal

To Provide an ERP solution that meets our client's resources, requirements, and standards in helping them build more profitable businesses globally.

The Need

An All-in-one, easy-to-use, flexible, and integrated solution that empowers users to make informed decisions, increase sales success, and provide superior customer service at the enterprise level.



SCOPEX

Enterprise Resource Planning Software

01

Right for Your People

Apt for your business with enterprise-level capabilities giving a 360-degree view of customers.

Right for Your Business

Flexible design, process automation, and real-time business insight

02

03

Right for Your Environment

Rapid deployment, simple to customize, and easy to manage

Scopex ERP Product Overview (CRM, ERP)



Licensing Policy

Select core module

Licensing Apply on per user/
per month

1

Select Add on Plugins

Licensing Apply on per
company/ per month

2

3

Select Numbers of users

Licensing applies on – A
Name User License.

4

Implementation Cost

Licensing applies based on
selected modules.
Customization and on-site visits.

Scopex ready to use business platform that can configure personalized touch based on the company requirements. In case of any additional customization requirements found after Gap Analysis, charge extra subject to mutual approval.

The default scope of work includes telephonic, email, and remote access support. You may avail of chargeable on-site visits for implementation or training.

Advantages of Scopex software

- End-to-end solution for enterprises.
- Mobile Accessibility
- Low-cost acquisition
- Customization service
- Well-defined implementation process.
- RAID implementation configuration
- Premium Full Cycle Support
- 24*7 Maintenance Assistance



Benefits of the SaaS Model

- Auto Recovery on a cloud server
- Global virtual office
- Paperless work and no more spreadsheets
- Zero licensing obligations
- Highly responsive, Any mobile device accessibility
- High uptime server
- Highly secure
- High Scalability
- Easy deployment
- Less Local IT infrastructure dependency



Customer Relationship Management (CRM)

CONTACT MANAGEMENT

- End-to-end solution for enterprises.
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PRODUCT MANAGEMENT

- Privacy
- Product Master
- Product variant management
- Product Wise Transaction Tracking
- Product Alias Product Gallery
- Vendors Mapping
- Product Annexure Mapping
- Categorization & Division
- Dashboard



TASK MANAGEMENT

- Task customization view
- Task Follow-up
- Timesheet and create issue actions
- Dynamic Activity & Sub Activity
- Log notes, send the message, schedule activity features
- Task Followers
- Task Templates
- Task attachments
- Task stage management
- Priority



Customer Relationship Management (CRM)

APPOINTMENT MANAGEMENT

- Google Calendar Integration
- Dynamic Status
- Dynamic Types
- Calendar Views & Time Management
- Dynamic Category
- Email Integration
- Trigger notifications and alerts
- Personalized calendar view



TIMESHEET

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

DOCUMENT MANAGEMENT

- Master data management
- Centralization
- Approval Workflow
- Privacy
- Vendor Management
- Notes
- Logs
- Folder Management



Customer Relationship Management (CRM)

OTHER FEATURES

- Dashboards
- Document Custom Fields
- Document Templates
- Reports and analytics
- Discuss
- Electronic Reminders
- Daily Analysis
- Outgoing Email



OPPORTUNITY MANAGEMENT

- Data Import Tools
- Other features are the same as contact management of basic CRM
- Follow-ups Management E
- Employee Wise Prospect
- Privacy
- Appointments
- Activity management

Customer Relationship Management (CRM)

LEAD MANAGEMENT

- Crucial information management.
- Select your Team leader, Individual, and admin.
- Unique Quotation templates
- Track and monitor Sales Order
- Display the following,
 - ▶ Lead creatives and specified duration and team member
 - ▶ All Follow-up schedules
 - ▶ All appointment schedules
 - ▶ All follow-ups done to all leads
 - ▶ Forecasting and sales funnel with stage-wise lead count and revenue
 - ▶ All filters for further follow-up
 - ▶ All follow-ups during the specified timeframe and by a team member
 - ▶ Associated contact, created by, assigned by,
 - ▶ Lead title information Lead address with google Maps.
 - ▶ All quotations created for lead contact in the list
- Update priority, and followers.
- Record, Track, monitor, and manage lead information.
- Document telephonic, on-site visits, and message follow-up
- Auto-documentation of activities
- Add forecasting, won and Lost with reason

Customer Relationship Management (CRM)

QUOTATION AUTOMATION

- User Define Quotation
- Formats Inline Profitability Analysis
- Single Click Quotation from Custom BOM
- Documents, Images, Tasks, and other attachment options
- Approval Workflow Customer Wise
- Auto Discounting
- Multiple Pricelist Management
- Lead to Quotation Automation
- Single Click Copy & Revised Quotation
- Print quotation
- Option Terms & Condition,
- Product Master



MARKETING ANALYTICS

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

Sales Management

- Create, Revise, Copy, Print, and mail the Quotation
- Create a Sale Order / Request for Approval
- Sales Analytical Reports
- Receipt of Payment
- Create Invoice/ DC
- Personalized sales order templates
- Multiple Price List Management
- Customer Wise Auto Discounting
- Real-time Order Profitability Calculator
- Customer & Product wise auto tax applicability
- Documents, Images, Tasks, and other attachment options
- Approval Workflow
- Credit Limit Management (Days & Amount wise)
- Payment schedule planning & Notifications
- Delivery schedule planning & Notification
- Sales Transaction Locking (Contact & Product wise)
- Price List
- Quotation to Sales Order and Invoice Automation
- Revise SO option
- Employee-wise, product-wise, SO-wise, PO-wise, Invoice wise Sales report generation
- Sales analytics generation for Quotation, SO, and Sales invoice
- Dashboard
- Event-based email & SMS alerts



Sales Management

PURCHASE ORDER / INVOICE AUTOMATION

- Third-party integration
- Multiple types of PO / PI printing options with total and tax summary
- Product-wise vendor information management
- Primary vendor 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, Tasks, and other attachment options
- Payment schedule planning & Notification
- Material receiving schedule planning & Notification Approval Workflow
- Import and compare Vendor price-lists
- Edit / Revise PO / PI option
- Copy and print the SO option
- Purchase Order Register
- Purchase Invoice Register
- Material propagation Register
- Purchase Return Register
- Purchase order template personalization and customization



Inventory Management

- Categorize and manage stock GroupWise Inventory location tracking
- Inventory movement tracking
- Item-wise stock minimum–maximum mapping and auto alerts
- Stock on PO and Stock on SO tracking
- Inter-branch stock transfer utility
- Master product management
- Manual stock adds, open, remove option
- Inventory location import utility
- Auto Inventory Adjustment
- Define Reordering rules
- Purchase item unit conversion
- Threshold stock report
- Stock summary reports (Branch-wise & Product-wise)
- Stock valuation report
- Define minimum inventory
- Product transfer management
- Batch pickings
- Inventory adjustments
- Scrap management
- Reordering rules management
- Product variant management
- Lots/ serial number management
- Warehouse management



Procurement Management

- RFQ management
- Purchase management
- Vendor management
- product master management
- vendor pricelist management



HRMS

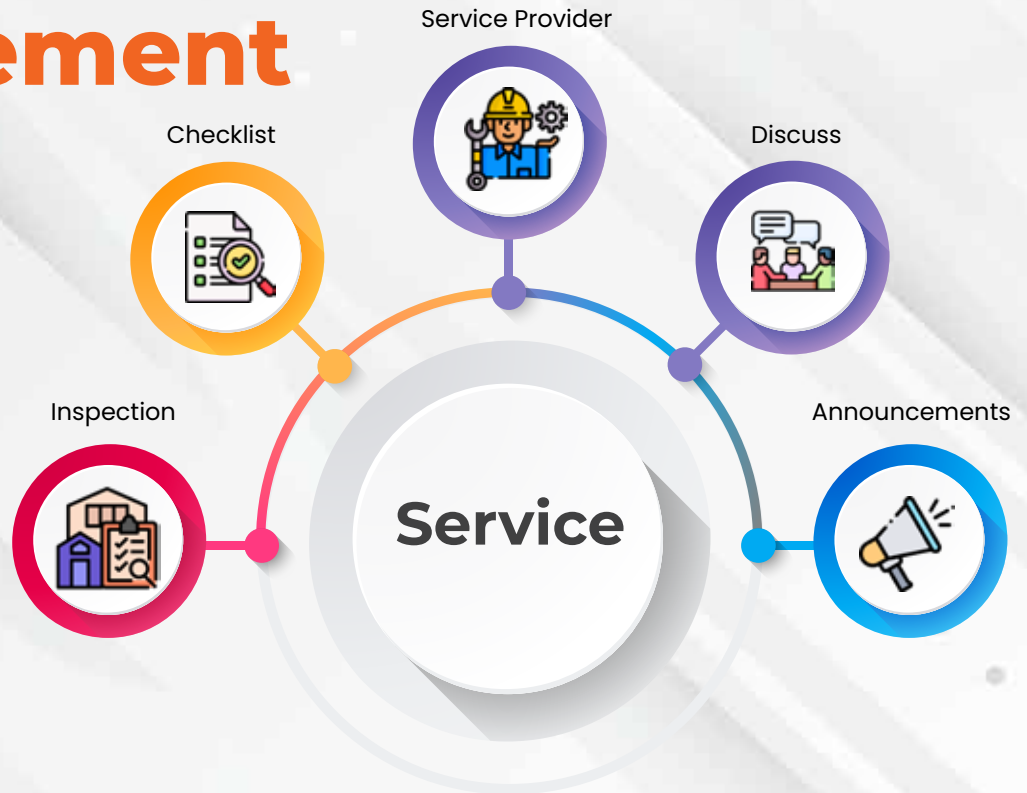
- Payroll management
- Appraisal
- attendance
- employee
- recruitment
- leaves management
- Loan/salary advance
- Dashboard
- Expense management

Manufacturing

- Manufacturing order
- Unbuild order
- Scrap order
- Master product variants
- Bill of material
- worktime management



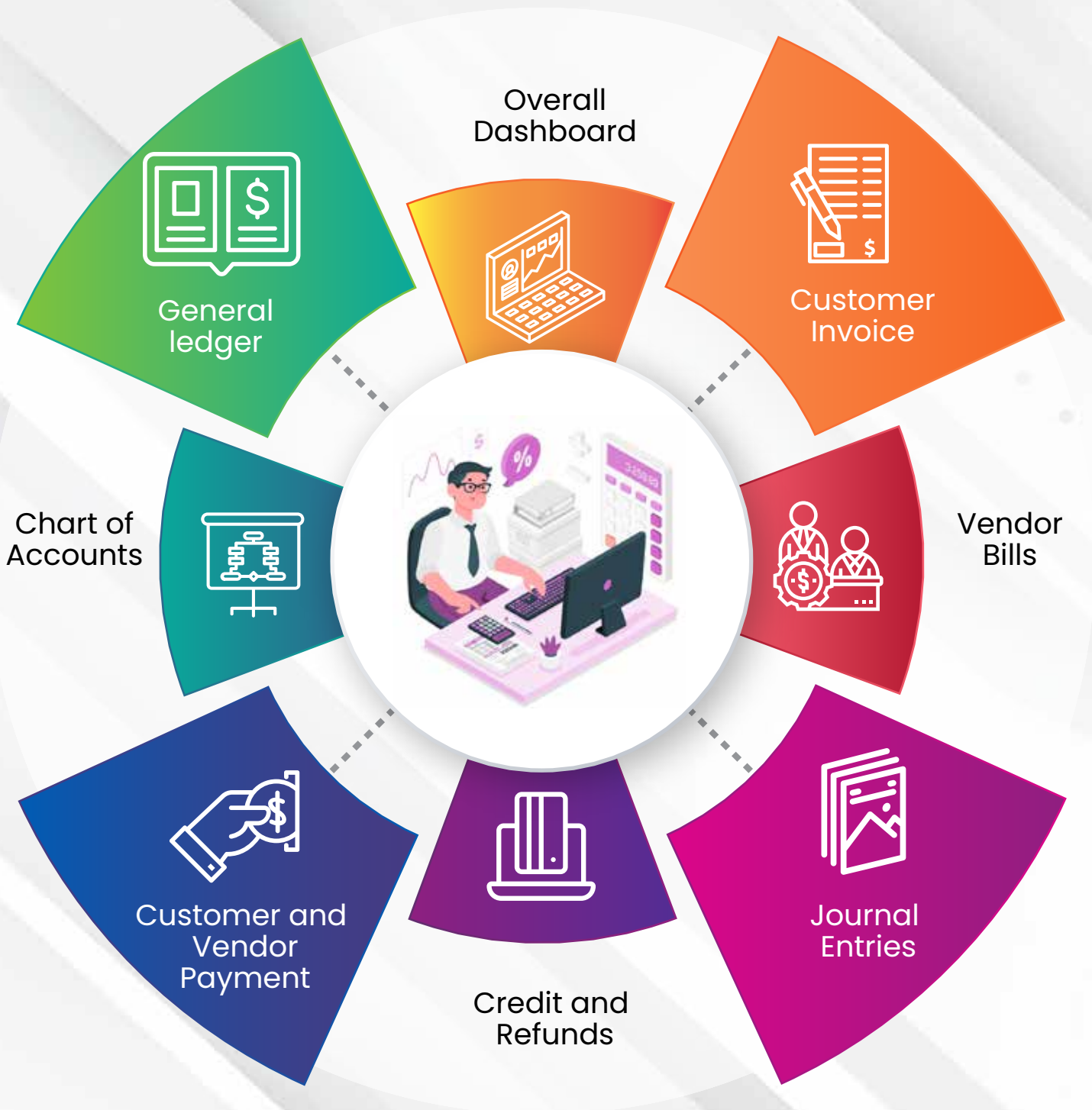
Service Management



Project Management



Accounting Management



Scopex ERP for all Industries and Fits every industry

- Retail Traders & Distributors Service Providers
- Marketing Companies
- Manufacturing Industry
- IT Solution Providers
- Building & Construction Industry
- Education Industry
- Health industry
- Logistics
- Service industry
- Fleet Industry
- Facility management Industry
- FMCG
- Field service industry
- Trading



The life cycle of product evolution

At Scopex ERP services, we open our ears wide to the client queries & needs and improve our product functionalities & capabilities with agile & advanced business tools & technologies to deliver value to them. Our skilled in-house developers consistently track and process all development-related issues in a structured and well-organized manner to ensure efficient and rapid deliveries of our version updates. Our team also releases the Release notes every time we roll out a new system update.



Bug fixing



Improvement



Enhancement



New Development

Clients Served

Our clients from worldwide are creating success stories in their respective industries using Scopex ERP software, a much-needed digital solution for industry 4.0 transformation.



Get A Free Demo



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