

## What is ERP ?

ERP (Enterprise Resource Planning) is a technique of applying IT (Information Technology) to achieve optimum utilization of various available business resources like Finance, Human Resource, Machines, Materials, etc. ERP has been developed with a sole purpose of facilitating information sharing for assisting in decision making process for business planning thus reducing inefficiencies of business processes.

ERP assured enormous enhancements in effectiveness, for instance, minimal duration between orders to delivery, with minimum inventory in addition to enhanced customer service. Inspired by these likelihoods, a majority of business enterprises around the world invested heavily on Enterprise Resource Planning systems.

## Benefits of ERP - from a business process perspective

1. **Process integration** - ERP systems integrate various functions of your business. For example, purchase-to-pay or order-to cash cycle involving several activities and departments/individuals can be tightly integrated and harmonized. The need to wait for information or discontinuities between departments can be eliminated.
2. **Process standardization** - ERP helps you achieve process standardization. Everyone in your organization using the system will follow the same process. It helps you reduce variability and achieve higher quality levels. Training and induction of new employees becomes easier.
3. **Process institutionalization** - If your company opens new sites or acquires other companies, the new entities can adopt your standard process easily as the processes are codified by the ERP system. No need to reinvent the wheel.
4. **Process automation** - ERP helps in the automation of repetitive activities resulting in greater speed and accuracy. For example, using min-max the system place orders for C class items automatically. Your purchasing department can just focus on higher value items. By automating processes, the system helps you reduce your operating cost.
5. **Process optimization** - ERP systems hold a lot of valuable data. The data can be used to optimize your operations. For example, inventory levels can be optimized based on actual usage, cost and lead time captured by purchasing, costing and manufacturing transactions. Lead time for purchasing can be reduced based on vendor performance data. Based on customer demand pattern, you can perfect your forecasting methodology.
6. **Process differentiation** - A firm that has the best process differentiates itself from the competition. Many ERP systems can be modified to incorporate proprietary business logic. For example, if your pricing strategy is key to winning business, you can build a custom quotation module which will help you succeed consistently. By codifying your expertise with the base transaction system you can create a powerful combination which will provide competitive advantages.



## Features in ERP:

**Production Management** : Plant structure, production plans, BOM's, MRP, manufacturing orders, job reports, costs of production, work incidences, preventive maintenance types

**Financial Accounting & Analysis:** Accounts Payable, Accounts Receivable, fixed assets, general ledger and cash management, financial reporting etc.

**Human Resources:** Perks, training, payroll, time and attendance, etc.

**Supply Chain Management (SCM)** : Inventory, supply chain planning, supplier scheduling, claim processing, order entry, purchasing, etc.

**Customer Relationship Management (CRM):** sales and marketing, service, commissions, customer contact, calls center support, etc.

**Materials Management** : Manage inventory receipts, shipments, moves and counts across your warehouses, suppliers and customers.

**Order Management** : Create quotes, book orders, manage materials, generate invoices and collect cash.

**E-Commerce** : Create and run a secure web store front.

**Procurement Management** : Rates, purchase orders, goods receipts, invoice registration and accounting, purchase planning

**Project and Service Management** : Projects, phases, tasks, resources, budget, expenses and expense invoicing, related purchases

**Business Intelligence (BI)** : Reporting, multidimensional analysis (OLAP), balanced scorecards.

## Need of ERP for SME

Small and Medium Enterprises (SMEs) face a tough challenge in the highly competitive environment to have a sustained profitable growth. SME's ability to provide any meaningful service for their customers will create a difference and provide a competitive edge in terms of their offerings. "**IT for business growth**" is the only way to keep abreast with the pace and continuously grow to reach the next level, competing with the big players. A robust software package that can help SMEs with real time analysis and which would also help the internal departments a faster and seamless information access, reporting and MIS systems, will reduce time which is a very vital and critical factor in today's world and also to reduce redundancy and duplicity of data and work.

## Open Source ERP

The world of ERP has been dominated for years by the likes of SAP, Oracle, PeopleSoft and Microsoft Dynamix. These ERP systems are broad and deep in functionality, but as we all know, are difficult to implement and very expensive to support.

An Open Source software is a community effort and in many cases free. There is neither license fee nor modules fee. Obviously it will reduce lots of ERP implementation cost. You can add as many as users required without worrying the user license. The costs involved in the entire implementation process is the consultancy & support charges of the service provider organization, apart from the necessary IT hardware costs.



## Open ERP : An affordable but powerful & efficient ERP solution for small & medium size enterprises

Given that the proprietary ERP solutions like SAP, Oracle Financials, PeopleSoft, Microsoft Dynamix etc. cost millions and implement and maintain, such systems were only used by blue-chip (read big and huge) companies. However the use of ERP has changed in modern times and now with advent of affordable and efficient ERP solution called **OpenERP**. Now any organization (whatever its business), wanting to grow in modern competitive business world can and should adopt **OpenERP**.

**OpenERP** being a modular system, covers a wide range of functions and integrates them into one unified whole that works harmoniously. For example functions such as Human Resource Management, Payroll, Supply Chain Management, Customer Relations Management (CRM), Financial Management (Accounts), Manufacturing Management, Warehouse Management, etc. are each in separate modules which when installed works as a unified whole.



## Advantages of OpenERP

### Simplicity & Flexibility

The simplicity and flexibility that is offered by OpenERP when considered with other ERP gives users easiness in usage of the system.

### Architecture

The architecture of OpenERP is simple and easy to understand as compared to other ERP solutions available in today's market.

### Cost

The Total Cost of Ownership of OpenERP is affordable by every enterprise be, it small, medium or even large scale enterprises. Similarly the cost of implementation and maintenance of OpenERP is affordable by every size of organization.

### Training

The training that the users will need in typical proprietary ERP solutions involves lots of time and cost. Employees/users need to be a bit Tech savvy's in understanding it whereas OpenERP training involves very less time and cost and also the employees/users need to have only a minimum basic knowledge of computer.

### Time for Implementation

Time for implementing an in typical proprietary ERP solution needs lots of time whereas the time needed for implementing an ERP solution is very less as more than 500+ modules are readily available in OpenERP.

### Addition Of Modules

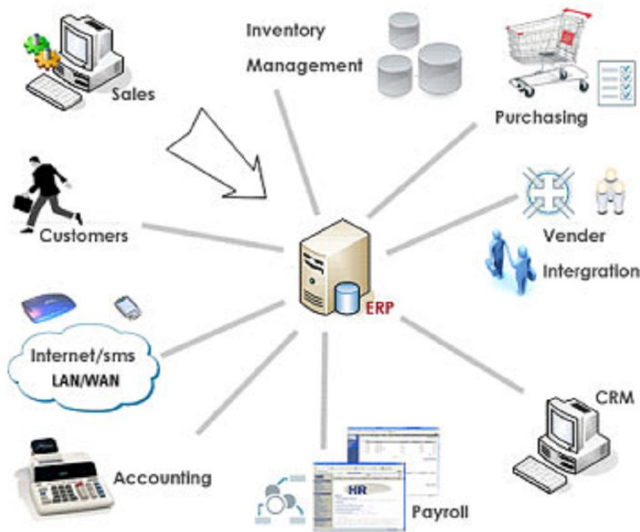
In OpenERP one can activate/add any modules as and when require with no additional cost whereas in other proprietary ERP solution to have an additional module they need to consult the service provider to add new module which also involves additional costs.

## Multi Platform

OpenERP is the only solution that will run well on a variety of hardware and almost all operating systems existing in the world right from Windows to Linux to Mac OS X to Solaris. It also runs well in web browsers as well as mobile platforms like Android, iOS, WebOS and Symbian OS.

## Open ERP : Functional Features

- CRM
- Accounting
- Point of Sale
- Project Management
- Warehouse Management
- Human Resources
- Purchase
- Manufacturing
- Marketing
- Invoicing
- Application Builder
- Payroll



# OpenERP CRM

OpenERP CRM allows you to track your best leads and opportunities. You can customize your sales cycle, control statistics and forecasts and setup marketing campaign automation to improve your sales performance.

## Key Features



### Trace Leads & Opportunities

Manage your sales team, sales funnel and track your best leads and opportunities up to the sales order



### Outlook & Thunderbird Plugins

Synchronize your emails with OpenERP CRM. Create new leads from outlook, zoom the customer or the document etc.



### Get Realtime Statistics

Get accurate forecasts with the OpenERP CRM business intelligence engine to analyze your sales activities.



### Acquire Leads

OpenERP CRM provides an email gateway, website integration forms and plugins to create leads automatically through web-services.



### Plan Meetings & Phonecall

Follow-up your opportunities efficiently: Shared calendar of meetings, logs of calls, sales task etc.



### Follow Quotes & Sales Order

Convert opportunities to quotations in one click, convert the quote to a sale order and follow-up a sales(invoicing, deliveries, etc..)



### Run Marketing Campaigns

OpenERP CRM allows you to automate your lead processing using marketing campaigns that automate emails or paper mails.



### Be Mobile

OpenERP CRM's calendar is synchronize with iPhone, Ms Outlook or Android.

# Accounting & Finance

Record your operations in a few clicks and manage all your financial activities in one place. Financial operations has never been easier.

## Key Features



### Smart User Interface

As an accountant, you need to be able to record a set of operations in just a few minutes.



### Easy Payment Management

Reconcile invoices easily with payments through bank interfaces and check handling and printing.



### Integrated Analytic accounting

Get your analytic accounting operations integrated with timesheets, projects, invoices, warehouse, etc.



### Multi-Currency

Unlimited currencies supported with daily automatic updates of currency rates.



### Multi-company

Get your consolidated trial balance and consolidate statistics in real time.



### Invoice Control

Get clear visibility of invoices awaiting from your supplier, control and validate them without re-encoding.



### Automate your Follow-Ups

Set-up and automate follow-ups to get a periodical financial overview and get paid quickly.



### Easy reconciliation

OpenERP helps you to easily reconcile invoices and payments using the manual approach or the automated wizard.



### We support your country

We support: US, FR, IN, UK, ES, CH + 20 other countries



### Dashboard & KPIs

Get customizable real time statistics with drill-up, drill-down, filter, drill-across data.

# Warehouse Management

OpenERP invented the double-entry inventory management system which allows to manage complex needs very easily: tracking stocks of suppliers/customers, full traceability, accounting links, etc.

OpenERP supports multi-warehouse management based on hierarchical locational structure. Manage your own internal locations, external locations, customers, suppliers or manufacturing inventories.

## Key Features



### Advanced Logistic Routes

OpenERP supports push and pull rules to define your complex routes in your warehouses.



### Control Receptions

Just click on a location and attain a thorough inventory analysis, for a specified period with the inventory control



### See your inventory's worth

With the inventory valuation you can see the monetary value of your stock quantity, for each location.



### Trace your stock moves

Track all past or future inventory transactions. Lists facilitate transactions from one location to another.



### Never run out of stock

With minimum stock rules you have automatic orders with the right quantity to get the maximum specified level.

# Human Resources

Manage the most important asset in your company: "People". With our module for personnel information management, leave, time tracking, attendance, expenses, payroll, periodic evaluations and recruitment.

## Key Features



### Track time and attendances

Record timesheets, check time spent on tasks, control your employees and project costs.



### Follow recruitment

Keep track of the recruitment process to facilitate evaluation. Search and browse through your CV base.



### Reporting

Giving you a comprehensive overview of your employees' timesheet and leaves in one single dashboard.



### Plan periodic evaluations

Set-up evaluation plans for your employees and watch their evolution. Define steps with interviews and keep track of the progress.



### Manage your employees

Enter all essential data on your employees and oversee all important information in your company address book.



### Centralizing your expenses

Get rid of the paper work and follow expenses directly into OpenERP. Easy validation, reimbursement and re-invoicing.



### Manage leave requests

Employees enter their requests (paid holidays, sick leave, etc), for managers to approve and validate.

# Purchase Management

Simply create and track your purchase orders, manage your suppliers' info, control your products reception process and check suppliers' invoices.

## Key Features



### Automated Propositions

You will receive automated proposition of purchases by OpenERP according to stock levels, sales, etc.



### Control Receptions

With the inventory control manage back orders, reception control by orders lines and quality control.



### Personalized analysis

Analyse the performance of your suppliers using the flexible reporting: delivery delays, discount on prices, etc.



### Follow your suppliers

In the Address Book you can follow all moves and transactions related to a given supplier with the history tab.



### Create your products

OpenERP allows you to fully customize the information you want to input about your products.

# Manufacturing

Plan and control your supply chain through different applications in the Manufacturing module. Personalize your master data, configure planning, manage your manufacturing and work orders.

## Key Features



### Efficient Scheduling

Schedulers automatically organise manufacturing orders, launch purchase orders & reserve products in stock.



### Bar Code Support

Use our bar code support to record time and operations on different work orders.



### Flexibility in All Operations

Edit manually all operations at any level of the progress. With OpenERP, you will not be frustrated by a rigid system



### Stock Analytics

Track the evolution of the stock value, according to the level of manufacturing activities as they progress in the transformation process.



### Manage materials and HR

Define and plan efficiently the working time and capacity of your resources.



### Master Data

OpenERP supports: multi-level Bill of Materials, push & pull logistic rules, advanced routings.



### Stock Alerts

Get your stock alerts generated in real time to avoid shortages at any given time.

# Marketing Campaign

Marketing campaigns can help you automate email and email sending, qualify leads and encourage customers to contact the right department. This will help you save time, and communicate with your customers in the long term.

## Key Features



### Automate your leads

Automate your company's response to emails and use your web page to insert chosen criteria that will automate which emails will be sent.



### Smart Segment Definition

Be successful in your campaigns by adopting a concrete methodology of execution and by choosing the right segment.



### Diagram View

Use drag & drop in diagram view to easily design your campaign activities.



### Customizable Email Templates

Create and adapt emails and save them easily with one click; use them as templates in any other campaign that you want!



### Define your campaign

Select the actions to be taken, the mails to be sent and the time delay between each activity.



### Integrated with CRM

The Marketing Campaign module is closely synchronized with the CRM module all affiliated objects (leads, partners, opportunities).



### Test Mode

Take control of the campaign manually, to test the response or to see what your emails look like as a finished product.



### Campaign follow-up

This crucial tool helps you follow the progression of the campaign: sent e-mails, e-mails to send, actions taken

# Invoicing

Generate your outgoing and pay your incoming invoices. Create and supervise all your supplier and customer's invoices & credit notes in simple steps.

## Key Features



### Invoices made easy

Enter the right information (quantity, price, customer name, etc) and click print. Your invoice is done!



### Print Checks

Record and print your supplier checks directly from OpenERP.



### Invoice Analysis

Get a quick overlook on your key performance indicators and use our reporting tools to analyse your performance.



### Customers Follow up

Email or print directly from OpenERP follow-ups on your invoices for your customers.



### Payment Tracking

Keep track of invoices to pay, record your customer and supplier payment and reconcile them automatically.

# Application Builder

With the OpenERP application builder features you can customize every module of OpenERP to fit your business needs without any development required, directly from the web interface.

## Key Features



### Screen Designer

Develop new screen and add fields on existing views to fit your specific needs.



### Report Designer

Design your own template of report directly from OpenOffice using our plugins.



### Web Services

Develop your own plugins using our full-featured web-service interface through XML-RPC.



### Workflow Designer

Drag & drop to customize your business logic and automate actions for every document or steps.



### Database Builder

Create new objects and add new fields to adapt OpenERP to your own business needs.



### Package as Module

Pack your customizations into a module you can publish or reuse using the module recorder.

# Payroll

Maintain data of all the employees in your organization, generate salary slips, manage contracts, get customized reports

## Key Features



### Fully integrated and powerful

It's easy customizable & fully integrated with the rest of the software.



### Multiple contracts

This feature permits you to add multiple contracts for a single employee.



### Multiple countries

Currently, we provide payroll rules for Belgium, but you can easily adapt it to your own country.



### Flexible & smart

Generate a batch of pay slips at once and have all payslips ready in one go.



### Automatic fill-in

When getting a payslip ready, you only have to select the right employee and the rest of the data fills in automatically.



### Temporal data

Freedom to access data of any given data, different versions of one record & manage changes in contract/employees