



OPEN SOURCE BUSINESS APPLICATIONS

OPENERP QUICK START



Today my company
deserves
a flexible and affordable
enterprise management
solution

What am I looking for ?

Managing my customer relationships ?

- ✓ Manage my leads
 - ✓ Optimize my Sales Cycle
 - ✓ Create customized dashboards
 - ✓ Improve my sales reporting
 - ✓ Communicate with customers and colleagues
 - ✓ Control & Manage my sales forecasts
- and much more ...



Managing contracts – SERVICES/PROJECT/ISSUES ?



- ✓ Manage my customer contracts
 - ✓ Optimize and analyze my time management
 - ✓ Manage, analyse & trace my issues
 - ✓ Create customized dashboards
 - ✓ Perform project management
 - ✓ Trace my invoices
 - ✓ Manage my helpdesk
- and much more ...

Performing Point of Sales management - POS ?

- ✓ Manage products and product categories
 - ✓ Manage your inventories
 - ✓ Manage inbound shipments
 - ✓ Manage delivery orders
 - ✓ Configure your payment methods
 - ✓ Manage sales journals
- and much more ...



Managing Human Resources ?



- ✓ Manage my employees
 - ✓ Leaves administration
 - ✓ Create, control & invoice timesheets
 - ✓ Manage & track expenses
 - ✓ Organise the recruitment process
 - ✓ Plan and follow-up on appraisals
- and more ...

What's in it for me ?

- A. The OpenERP Enterprise Contract (1 year) covering
 - a. Unlimited bugfix
 - b. Security alerts
 - c. Migration
- B. The “Get on Board” Hands-on Training (4 options)
 - a. CRM – 3 days
 - b. HRM – 2 days
 - c. Service MGMT – 3 days
 - d. POS – 2 days
- C. On-site consulting (minimal 2 days)

How do we work?

1. Together, we qualify your main business needs and retain a key area
2. We prepare a tailored demonstration with your own data
3. We organize a session of 2 hours together with a functional consultant
4. We train you on a dedicated module (CRM, Services, POS or HR)
5. We deploy your instance with a functional consultant

Qualification (1), Demo configuration (2) & live demonstration (3)
are
free of charge!

GET ON BOARD PROGRAM

CRM

Day 1 - CRM Features

AM Session

Get started with OpenERP

- Discover Views and Search/Filter features
 - List, Form, Calendar, Graph, Kanban, Gantt views
 - Basic search
 - Group by
 - Advanced search
 - Tool tips
- Print and attach Documents
- Run Actions on records (Deletion, Duplication) and open associated Views
- Install / Update / Remove modules
- Configure your Company
- Use Social Network features inside OpenERP:
 - Chatter
 - Email box / To-do
 - Discussion Groups
 - Notes

Get started with OpenERP Online

PM Sessions

Manage your Address Book

- Register your Contacts (Companies or Addresses/Consumers)
- Find and Sort your Contacts using Filters
- Categorize your Contacts
- Use LinkedIn to populate your Address Book

Manage your Leads

- Store your Business Cards effectively
- Generate Leads automatically based on a received Email
- Analyze and Organize your Leads thanks to Salespersons & Sales Teams

Optimize your Sales Cycle through Opportunities

- Convert Leads into Customers or Opportunities
- Adapt OpenERP to your Sales Organization through:
 - Sales Teams
 - Key Steps of your Presale Cycle
- Plan the Next Action and the Deadline date
- Plan your Meetings & Calls Effectively

Keep track of your Customer's History

- Track Leads, Opportunities and Sales Orders of each Customer
- Store Attached Documents

Day 2 - Sales Flow

AM Session

Register your Products

- Characterize the Product: Price, Type, Procurement Method, Supply Method
- Categorize it
- Define Units of Measure

Process your Sales Flow

- Encode and configure your Orders (Invoicing Policy, Delivery Policy)
- Keep track of open Orders
- Sales to Invoicing
 - Advance Payment
 - Partial Payment
- Analyse your Sales & Invoices data

PM Session

Customize your Sales Processes

- Define Packaging
- Manage Alerts
- Keep track of your Margins by Product and on Sales Orders

Convert a Prospect into a Customer

- Create a Quotation and a Customer from a Lead/Opportunity

Manage Aftersale Services

- Create a Claim (on the fly or automatically from a received Email)
- Characterize the Claim: Topic, Deadline, link with other Documents (i.e. Sales Order), Actions to perform
- Communicate internally and with the Customer

Day 3 - Advanced Configuration

AM Session

Manage Pricelists

- Create Pricing Policies (Tariff Grids)
- Assign Pricelists to Customers
- Manage Currencies
- Manage Carriers & Transport Costs

Import your own data

- Import your Customers
- Import your Products

PM Session

Advanced Features

- Configure a Public platform for external people (prospects, etc.)
- Configure a Portal platform for your Customers (Sales Orders, Invoices, etc.)
- Set up Automated Actions (assign a specific Salesman, add a default record Follower, etc)
- Customize your Reports through Report Designer & Customize your Email templates

POS

Purchasing, Storing and Reselling Products

Day 1 - Purchase Products to Suppliers

The introduction to OpenERP is suggested through an online video to watch before coming at the Get on Board session.

AM SESSION

Register your Products

- Characterize your Products: Type, Procurement Method, Supply Method, Cost, Price
- Categorize your Products
- Register Suppliers & Associate them to your Products

PM SESSION

Purchase those Products

- Define your Purchase Process:
 - Invoicing & Shipping policies
 - Communicate with your Suppliers
 - Customize the Process: validation steps, requisition

Store the received products

- Ship the incoming Products
- Learn to analyse your Stock Reports

Set up your Point of Sale:

- Configure your Payment Methods and your Sales Journal
- Define your Shops
- Configure your Products for Point of Sale operations

Day 2 - Sell your Products

AM SESSION

Handle Customer Orders

- Open a Session
- Register PoS Orders
- Multi ticketting
- Scanning
- Invoicing
- Closing a session and registering the Cash content
- Validating the Accounting Entries

Manage Cash Operations

- Register the Cash content before and after a Sale Session
- Cash-in / Cash-out Operations

Reporting

- Access to your reporting tools (Sales, Stock, Accounting)

PM SESSION

Supplier Pricelists

- Register Supplier's Pricelists

Manage the Storage

- Follow Stock Moves
- Operate an Inventory
- Manage Traceability: Serial Numbers, Packs

Import your own data from your old system to

OpenERP

- Import your Suppliers
- Import your Products

Advanced Q&A session

Services Management

Offering your Services to your Customers

Processing the Invoicing

Managing your Customers

Accounts/Contracts

Keeping track of your Activities/Time spent

Day 1 - Customers & Services

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 - Advance Payment
 - Partial Payment
- Analyse your Sales & Invoices data

Day 2 - Manage Accounts/Contracts &

Activities

AM SESSION

Create Customer Accounts/Contracts

- Create Contracts for Customers:
 - Prepaid amount
 - Time Material basis
- Define the application Dates and the Terms of the Contract
- Configure the Re-invoicing based on Orders, Timesheets, Expenses
- Renew Contracts
- Create Contract templates

Plan and follow your Activities through Projects

- Create your Projects and associated Tasks
- Define Stages in your Processes
- Delegate Tasks
- Track Issues and manage Issues Escalation (from one operational Level to another)

Record Activities/Expenses

- Associate Activities to Tasks
- Record Timesheets/Expenses
- Manage the Re-invoicing of those records
- Associate Revenues and Costs to Employee's Work

Introduction to Analytic Accounting

- Create your Analytic Journals & Accounts
- Track Costs and Revenues associated to an Analytic Account

PM SESSION

Customize your Sales Processes

- Define Packaging
- Manage Alerts
- Keep track of your Margins by Product and on Sales Orders

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Day 3 - Advanced Configuration

AM SESSION

Manage Pricelists

- Create Pricing Policies (Tariff Grids)
- Assign Pricelists to Customers
- Manage Currencies

Import your own data

- Import your Customers
- Import your Products/Services

PM SESSION

Advanced Features

- Configure a Public platform for external people
- Configure a Portal platform for your Customers (Sales Orders, Invoices, etc)
- Customize your Reports through Report Designer
- Customize your Email templates

Advanced Q&A session

HR MANAGEMENT

Managing your Employees Repository,
Leaves, Timesheets, Expenses, Recruitment
Process, Appraisals

Day 1 - Employees, Leaves & Timesheets/Expenses

The introduction to OpenERP is suggested through an online video to watch before coming at the Get on Board session.

AM SESSION

Get started with OpenERP Online

Register your Employees

- Encode your Employee data
- Assign Employees to Jobs & Department
- Attach Documents to the Employee Form

Manage Employee Vacations

- Configure different types of Leaves
- Allocate Leaves to your Employees
- Encode Leave Requests
- Get a Leave Summary for each Employee
- Configure the Leave validation process

PM SESSION

Manage Employee Expenses

- Record Employee Expenses
- Process the Refund

Record Timesheets

- Record Timesheets and associate them to your Projects/Activities/Departments
- Process their Re invoicing to Customers
- Follow Attendances

Introduction to Analytic Accounting

- Create your Analytic Accounts (Projects/Activities/Departments)
- Track Revenues and Expenses associated to Timesheets/Expenses

Day 2 - Recruitment, Appraisals, Advanced Configuration

AM SESSION

Manage your Recruitment Process

- Record Applications (on the fly or automatically from received Emails)
- Define your Recruitment Process
- Define the Recruitment Expectations by Job
- Communicate with Applicants thanks to the Social Network features

Introduction to Surveys & Appraisals

- Create your own Questionnaires
- Define your Appraisal Process
- Fill in Appraisal Questionnaires
- Consult Results

PM SESSION

Advanced Features

- Configure a Public platform for Applicants (with offered Jobs, Company News, etc.)
- Adapt the OpenERP platform for your Employees (including Appraisals)
- Customize Emails

Advanced Q&A session

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