Open ERP Features

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You will find here a list of the most important features of Open ERP and Open Object. More than 350 modules are available, so this is just a summary of some of them.

Part I

Enterprise management

CHAPTER

ONE

SALES MANAGEMENT

Sales modules allow you to manage and classify your sales orders on a structural and hierarchical system. It gives you the ability to create new orders and to review the existing orders in their various states. Confirmation of an order can triggers delivery of the goods, and invoicing timing is defined by a setting in each individual order.

1.1 Keypoints:

- Get all information needed by the salesman to do his quote in one screen
- Complete follow-up and control of sales orders, deliveries and invoicing
- Traceability of all customers operations

1.2 Integration benefits:

- Integrated with point of sales
- Automatic accounting (financial and analytic) entries creation,
- Integrated with contracts, projects, master production shedule,
- Integrated with different eCommerce platforms for online selling.
- Design templates of re-useable offers with the report designer

1.3 Links:

- Module: sale

CHAPTER

TWO

INVOICING

Open ERP support lots of different logistics for the invoicing automation: from the sales orders, from costs (timesheets, purchases, etc.), from tasks, from recurring subscriptions, etc.

2.1 Key Points:

- A powerful pricelist system
- A very useful follow-up module

2.2 Integration Benefits:

- No double encoding at all
- Automatic generation of invoices according to different workflows
- Integrated with analytic accounting for profitability

2.3 Links:

- Module: account

CHAPTER

THREE

POINT OF SALES

Manage your point of sales directly with Open ERP. It allows you to easily manage all point of sales operations: selling, stock, encashment, invoicing, etc.

3.1 Key Points:

- Very easy and complete touchscreen interface for end-users
- Multiple payments systems
- Support for direct invoicing
- Support for reimbursments and products exchanges
- 12 types of supported barcodes

3.2 Integration Benefits:

- Integrated with stocks and accounting to avoid double entries
- Integrated with sales management
- Fully customizable

3.3 Links:

- Module: point_of_sale

CHAPTER

FOUR

PURCHASES

Purchase management enables you to track your supplier's price quotations and convert them into Purchase Orders. Open ERP has several methods of monitoring invoices and tracking the receipt of ordered goods.

You can handle partial deliveries in Open ERP, so you can keep track of items that are still to be delivered on your orders, and you can issue reminders automatically.

Open ERP's replenishment management rules enable the system to generate draft purchase orders automatically, or you can configure it to run a lean process driven entirely by current production needs.

4.1 Keypoints:

- Purchase tender management,
- Integrates best practices: MTS / MTO, JIT, MPS, Kanban,
- Invoices, delivered products and services control.

4.2 Integration Benefits:

- Automatic procurement propositions based on different logistics,
- Perfectly integrated with accounting, stock, manufacturing and project management.

4.3 Links:

- Module: purchase

CHAPTER

FIVE

SERVICES MANAGEMENT

Service management allows you to manage your company's projects and tasks without any limitations. It provides tools to manage multi-level sub-projects, control tasks from project manager, alert customers by e-mail for project support, schedule and prioritize the tasks assigned, etc.

5.1 Key points:

- Specific menus for specific users according to their roles
- History of interventions for each task and project
- Schedule control

5.2 Integration benefits:

- Completely inetgrated to the cost accounting
- Automatic completion of timesheets
- Reports and dashboards incorporated

5.3 Links:

- Module: profile_service
-
- Module: profile_service

Part II

Logistic

CHAPTER

SIX

MANUFACTURING

The manufacturing modules of Open ERP manage all the best-practices concerning manufacturing industries: multi-level BoM and routings, JIT, different costs methods available, phantom BoMs, configurable products, workcenter operations, integrates sales forecasts, etc. It supports several methods to automate productions or purchases propositions: MTS/MTO, Master Production Schedule, Minimum Stock Rules.

The scheduler will compute the best proposed planning according to the different constraints on products, customers, orders or workcenters. The production manager will be able to use our gantt views to organise the different resources or orders.

6.1 Key Points:

- Double-entry stock operations for a powerfull traceability,
- Support all best-practices and standards,
- Control costs and margins on orders, projects, products, partners,
- Easy to setup and run.

6.2 Integration Benefits:

- Schedule on products, services, sub-contractings
- Integrated with accounting for automatic transactions
- Integrated to HR management to get the availability of resources

6.3 Links:

- Module : mrp
-
- Module: profile_manufacturing

CHAPTER

SEVEN

PRODUCT PRICELISTS

Open ERP pricelists are extremely powerfull and easy to use. They allows you to efficiently manages promotions, customers special prices, segmentations of customers contracts made with customers or suppliers, etc. You can set fixed prices or work by rules to auto-compute prices according to the cost, the date, the currency, the category of product, etc.

7.1 Key Points:

- A powerful rule system to allows all kinds of automatic computations
- Easy or extended mode of work
- Manages long term and short term contracts and conditions

7.2 Integration Benefits:

- Integrated with sales, point of sales, and end of campaign discounts
- Use them for costs or sales controls

7.3 Links:

- Module: product

CHAPTER

EIGHT

QUALITY MANAGEMENT

Open ERP provides a module to manage the quality of your products or your services. The 'repairs management' module allows to organise after-sales services.

8.1 Key Points:

- Complete after-sales services integrated
- Traceability of all operations

8.2 Integration Benefits:

- Integrated with cost accounting for cost control of the quality
- Integrated with stocks to organise repairs and traceability

8.3 Links:

- Module: base_module_quality

CHAPTER

NINE

SHIPPING MANAGEMENT

The Open ERP warehouse management system provides lots of tools to organise efficiently your customer or suppliers shippings.

9.1 Key Points:

- Dynamic gantt or calendar views for planification
- Allows to manage by journal or department
- Good ergonomy for fast encoding

9.2 Integration Benefits:

- Deliveries costs and orders are computed automatically
- Automatic invoicing based on deliveries
- Integrated with the quality management system

9.3 Links:

Module:

CHAPTER

TEN

WAREHOUSE MANAGEMENT

This module provides functionality to manage multi-warehouses, multi and structured stock locations. For each warehouse, input location, output location and stock location can be defined.

10.1 Key Points:

- Easily create multi-warehouses with locations.
- **Thanks to the double entry management, the inventory controlling is powerful and flexible** (moves history and planning, stock valuation, robustness faced with Inventory differences, automatic reordering rules, bar code supported, rapid detection of mistakes through double entry system, traceability, ...)

10.2 Integration Benefits:

- Keep track of stock moves bewteen warehouses (from where goods are coming in and going out).
- Integrated with stock module.

10.3 Links:

- Module: stock

Part III

Accounting and Finance

CHAPTER

ELEVEN

ACCOUNTING

Open ERP porvides a fully integrated accounting module than cover financial accounting, analytic accounting, third party management, taxes management, budgets, assets, etc. Open ERP has more than 50 extra modules for specific accounting features: electronic bank transfers, assets management, automatic invoicing, analytic controls, financial indicators, statements management, etc.

11.1 Key Points:

- Multi-company, multi-currencies, multi analytic axes,
- Real-time consolidation of multiple charts of accounts,
- Very good ergonomy for fast encoding of entries and invoices,
- An integrated analytic/cost accounting,
- Lots of customizables reports.

11.2 Integration Benefits:

- Avoid re-encoding everything, all documents are pre-generated,
- Accountants decisions may have impact on the whole system,
- Cross reporting with others modules.

11.3 Links:

-
- Module: accounting

CHAPTER

TWELVE

ANALYTIC ACCOUNTING

The analytic accounting is the core of all management modules of Open ERP. It is perfectly integrated with all operations that have a (direct or indirect) cost or revenue. As an example, for services companies, the analytic accounting is used as the financial part of project management.

As all tools are integrated, it gives you a full control and automatisation of your company:

- Plannings are integrated with budgets,
- Project management is integrated with contracts and affairs managmeent, etc.

12.1 Key Points:

- Work with one or multiple analytic plans,
- About 40+ modules available to integrate best management practices,
- Nearly all transactions are automated to simplify encodings, etc.

12.2 Integration Benefits:

Fully integrated to all modules of Open ERP, here are the main onces:

- Timesheets or tasks are analytic costs on projects,
- Manufacturing operation reports costs on cost centers,
- Sales, purchases and invoices are also costs on analytic accounts,
- Holidays, expenses tracking, etc.

12.3 Links:

- Module: account_analytic_default

CHAPTER

THIRTEEN

ASSETS MANAGEMENT

For businesses from foundries to pharmaceuticals, tracking a complex fixed asset inventory becomes really easy with Open ERP. Having a good fixed asset module will make you avoid loosing millions of dollars each year in tax over-payment, regulatory non-compliance, and inefficiency.

Manages your assets easily with Open ERP. This module is fully integrated to the financial and analytic accounting modules for a maximum of power.

13.1 Key Points:

- Different methods of costing,
- IFRS compliant,

13.2 Integration Benefits:

- Fully integrated to the financial an analytic accouting modules
- Track changes on asset from any document in Open ERP

13.3 Links:

- Modules: account_asset

CHAPTER

FOURTEEN

BANK INTERFACES

Open ERP support electronic banking and invoicing through different modules. It allows you to communicate automatically with banks to send payment orders and receive bank statements automatically.

It currently supports CODA (Belgium+Luxemburg), SEPA (New European Standard), BVR/V11/DTA (Switzerland), Check printing (US), EDI (with SAP).

14.1 Key Points:

- Payment preparation system (advances, prioritizes, treasury management),
- Automatic reconciliation of entries

14.2 Integration Benefits:

- Fully integrated with accouting so that you never have to encode anything,
- It prepares the propositions of payments according to purchases, sales, invoices, etc.
- Visibility of payments from any module: CRM, sales management, etc.

14.3 Links:

- Module: account_coda, account_coda_2_1_d

CHAPTER

FIFTEEN

BUDGETS

The Open ERP budgets module allows you to manage financial and analytic budgets. You can manage the same budgets from three different points of views, according to the user role:

- Accountant: work on master and consolidated budget
- Project manager: work on analytic budgets on his projects
- Department manager: get a consolidated view on budget positions

15.1 Key-Points:

- Workflows on budgets (ex: a budget must be validated before launching a project),
- Three different points of view on the same budgets
- Analytic and financial budgets integration
- Mulitple axes

15.2 Integration benefits:

- Integrated to purchases, sales, timesheets and expenses notes
- Analytic budgets are integrated to the project management module

15.3 Links:

- Module: account_budget

CHAPTER

SIXTEEN

PAYEMENTS MANAGEMENT

As to help you to manage your treasury and your payments to suppliers, Open ERP provides tools to help you on the preparation of payments. They support workflows so that you can assign different responsibilities in the process.

16.1 Key Points:

- Different roles for encoding payments, approving payments and sending to bank
- Manage your treasury accross your different bank accounts
- Multi-Currency management facilities
- Support electronic bank formats and check printing

16.2 Integration Benefits:

- Fully integrated with the accounting system to avoid double encoding,
- Import and automatic reconciliation when encoding bank statements.

16.3 Links:

- Modules: account_payment

Part IV

Human Resources

CHAPTER

SEVENTEEN

EXPENSES

This module allows you to manage your company's daily expenses. It gives you access to your employees's notes fees and give you the right to complete and validate the notes of a period or to refuse them. After validation it creates an invoice for the employee.

Employee can encode their own expenses and the validation flow puts it automatically in the accounting after validation of managers.

17.1 Keypoints:

- Customisable workflow
- Validation system included

17.2 Integration benefits:

- Allows you to re-invoice expenses to your clients
- Integrated with financial and analytic accouting for costs control

17.3 Links:

- Module: hr_expense

CHAPTER

EIGHTEEN

HOLIDAYS MANAGEMENT

This module's main task is to control the holiday's schedule of your company. It allow employees to requests holidays. Then, managers can review requests for holiday, and control the overall holiday's planning for the company or departement.

18.1 Key points:

- Validation system included
- Customisable workflow for validation
- Support all kinds of leaves (sickness, holidays, paid days, ...)
- Calendar view

18.2 Integration benefits:

- Integrated to the company calendar
- Integrated with the payroll system for automatic computation

18.3 Links:

- Module: hr_holidays

CHAPTER

NINETEEN

PAYROLL

This module is still under development...

19.1 Links:

- Module: payroll

CHAPTER

TWENTY

POINT OF SALES

Manage your point of sales directly with Open ERP. It allows you to easily manage all point of sales operations: selling, stock, encashment, invoicing, etc.

20.1 Key Points:

- Very easy and complete touchscreen interface for end-users
- Multiple payments systems
- Support for direct invoicing
- Support for reimbursments and products exchanges
- 12 types of supported barcodes

20.2 Integration Benefits:

- Integrated with stocks and accounting to avoid double entries
- Integrated with sales management
- Fully customizable

20.3 Links:

- Module: point_of_sale

CHAPTER

TWENTYONE

SKILLS MANAGEMENT

Open ERP provides about 20 modules related to human resources management. Some modules will allow you to manage the skills of your employees, you can relate these to the periodical evaluation or the contract.

21.1 Key Points:

- Unique skill referential
- Ability to perform computations on skills

21.2 Integration Benefits:

- Integrated with periodical evaluations
- You can use the portal so that employees can consult their datas

21.3 Links:

- Module: hr_skill

Part V

CRM & SRM

CHAPTER

TWENTYTWO

CUSTOMER RELATIONSHIP MANAGEMENT

The generic Open ERP Customer Relationship Management system enables a group of people to intelligently and efficiently manage leads, opportunities, tasks, issues, requests, bugs, campaign, claims, etc. It manages key tasks such as communication, identification, prioritization, assignment, resolution and notification.

Open ERP ensures that all cases are successfully tracked by users, customers and suppliers. It can automatically send reminders, escalate the request, trigger specific methods and lots of others actions based on your enterprise own rules.

22.1 Key Points:

- Automatic incoming and outgoing email processing using the mail gateway,
- A generic and fully customizable system,
- A configuration wizard to help you setup it as per your requirements.

22.2 Integration Benefits:

- Integrated with the enterprise calendars,
- Integrated with sales, purchases and after-sales services,
- Get your enterprise processes running through workflows.

22.3 Links:

- Module: crm

CHAPTER

TWENTYTHREE

DIRECT MARKETING

The direct marketing modules manages and automatizes the development, execution and monitoring of campaigns across multiple channels. It provides tools to manage offers, campaigns, steps, workflows, etc. The report composition engine allows you to create bulk documents.

23.1 Key Points:

- Multi-channel: email, sms, paper, phone.
- Barcode support for paper propositions,
- Configurable Workflows,
- Offers management,
- Complete statistics and dashboards,
- Fast orders encoding.

23.2 Integration Benefits:

- Integrated with analytic accounting for cost control
- Integrated with helpdesk and after-sales services
- Automatic procurements (purchases, production) on campaigns
- Integrated with sales and CRM modules

23.3 Links:

- Module: profile_dm, dm

CHAPTER

TWENTYFOUR

MAIL GATEWAY

E-mail gateways can automatize and update cases in the CRM via e-mails. Users can create, assign or update cases to the CRM simply by sending or receiving e-mails without going into OpenERP interface. This module is a very useful tool to manage all from generic e-mails from the company (info, sales, support,...) and is dedicated to allow users to assign cases.

24.1 Key points:

- Compatible with most of mail clients and servers.
- Mails are automatically classified by the system
- Multi Users

24.2 Integration benefits:

- Totally integrated to the CRM modules

24.3 Links:

- Module:

CHAPTER

TWENTYFIVE

PHONE CALLS

Open ERP provides tools to organise phone campaigns. You can configure different workflows for the operator. It's fully integrated with the CRM so that you can use relationship management facilities: segmentations of customers, automated rules, escalation of cases, transform phone calls to opportunities, questionnaires, etc.

25.1 Key Points:

- Rules on: held, not held, multiple temptatives, questionaires,
- Segmentation tools to help you select and filter on prospects,
- Multiple phone operators allocation,
- Statistics on results, efficiency of campaigns and productivity.

25.2 Integration Benefits:

- Integrated with email marketing campaigns and segmentation tools
- Integrated with direct marketing modules

25.3 Links:

- Module:

CHAPTER

TWENTYSIX

PORTALS

The portal modules allows you to provide accesses on your system to customers or suppliers. Show only a part of your OpenERP application without developing all modules of your system. It is a useful module to allow customers, partners, suppliers, ... to use your system for particular tasks.

26.1 Key points:

- Rights management included to the portal
- All functionalities of OpenERP can be included into your portail
- Allow your collaborators to manage your system directly and safely

26.2 Integration benefits:

- Every OpenERP feature can be included into your portail
- Integrated with analytic account management system

26.3 Links:

- Module: portal

Part VI

Project Management

CHAPTER

TWENTYSEVEN

FINANCIAL PROJECT MANAGEMENT

Open ERP intagrates financial project management allowing you to stay in control of your different activities. It keep track of costs, budgets, automatic invoicing based on tasks achieved, profitability reports, etc.

27.1 Key Points:

- Based on the analytic accounting
- Fully integrated with human resources for cost control

27.2 Integration Benefits:

- Planning automatically impacts budgets and treasury
- Tasks and timesheets are fully integrated
- Sales orders and tasks control are integrated

Links:

- Module : profile_accounting
- Module: example

CHAPTER

TWENTYEIGHT

OPERATIONAL MANAGEMENT

Open ERP integrates a powerful multi-level project management system. It allows to manages tasks allocation, short and long term plannings, delegations, etc. It's fully integrated with sales or purchases.

28.1 Key Points:

- Dynamic Gantt view to organise projects and tasks
- Retro-Planning computations
- Integrates best practices: GTD, Scrum

28.2 Integration Benefits:

- Integrated with analytic accounting for financial part
- Integrated with sales and invoicing to automates tasks
- Integrated with HR modules for the organisation of the resources

28.3 Links:

- Module: project

CHAPTER

TWENTYNINE

TIMESHEETS

The timesheet system allows you to record time spent by employees on projects or activities. Its integration with the analtic accounting allows you to manage bugdets, plannings, costs and reinvoicing of human resources.

Different working methods are provided according to the need:

- Sign in/out by projects
- Simple timesheet encoding
- Full timesheet integrated with attendances and validation process by manager

29.1 Key Points:

- Fast encoding of activities on tasks or globally
- Easy and fast project selection, supporting alerts
- Fully customizable workflow
- Multi unit of measure: hours, days, weeks.

29.2 Integration Benefits:

- Integrated with analytic accounting for cost control of employee's time on projects
- Accouting integration to reinvoice based on time spent automatically
- Integrated with tasks from project management, calendar for meetings
- Integrated with attendances tracking system to spread worked time on projects

29.3 Links:

- Module: hr_timesheet

Part VII

Daily Productivity

CHAPTER

THIRTY

CALENDARS

This module allows you to get a quick overview of your enterprise calendar. You can link your calendars with lots of other modules: timesheet, project management, tasks, meetings, opportunities, ... Filtering datas upon a large among of criterias will bring you directly to what you are looking for.

30.1 Key-points:

- Multi-users, company, group
- Powerfull search and filter options
- Validation system included

30.2 Integration benefits:

- All management objects can be viewed as a calendar
- Linked to all hierarchical company system (overall company, departement, users, ...)

30.3 Links:

- Module: calendar

CHAPTER

THIRTYONE

GETTING THINGS DONE

This module implement David Allen's methodology: "Getting Things Done". It provides tools to help each user organise their time and tasks efficiently. GTD rests on the principle that a person needs to move tasks out of the mind by recording them externally. That way, the mind is freed from the job of remembering everything that needs to be done, and can concentrate on actually performing those tasks.

31.1 Key points:

- Implements: contexts, timeboxes, inbox, etc.
- Provide a tool to help you run all concept of the methodology in Open ERP

31.2 Integration benefits:

- Completely integrated to service and project management
- Integrated with timesheet to control the cost of the time

31.3 Links:

- Module: project_gtd

CHAPTER

THIRTYTWO

DOCUMENT MANAGEMENT SYSTEM

The document management system allows you to store, classify, and search your enterprise's documents. This module provides an FTP access to all your ERP's resources. For a dynamic and efficient classification, the folders structure is provided by other objects. It is very useful to track documents related to projects, products, sales, contracts, etc.

32.1 Keypoints:

- FTP Access for authenticated users,
- Automatic indexation of PDF, DOC, ODT, SXW, TXT.
- Virtual files and folders to automate any kind of document generation

32.2 Integration Benefits:

- Stores automatically ERP reports
- Automatic classification of resources
- Shared access rights for DMS and ERP
- Store emails with outlook Plugin

32.3 Links:

- Module: document

CHAPTER

THIRTYTHREE

OUTLOOK / THUNDERBIRD

This plugin connects Outlook/Thunderbird with important CRM data to ensure information is coordinated and shared across the company. With a few simple clicks, users can file Outlook/Thunderbird email, contacts and calendar information into various OpenERP modules, including Accounts, Opportunities, Leads, Cases, Contacts and more.

33.1 Key points:

- Link between e-mail and list of partners,
- Configure messages on partners, products, etc.

33.2 Integration benefits:

- Possibility of creating a partner directly from an e-mail adress

33.3 Links:

-

Part VIII

Efficient Communication

CHAPTER

THIRTYFOUR

ALERTS

Open ERP has an integrated alert/warning system. You can configure alerts on any step of any operation. The end-user will receive alerts on different events. We can trigger alerts on the screen or through the internal requests system. It allows to show the right information at the right time for each user. It also simplify a lot the communication between the different employees of a same company.

34.1 Key Points:

- Pre-configured warning module,
- Configure messages on partners, products, etc.
- Fully customizable.

34.2 Integration Benefits:

- The same alert can be triggered from different operations: sales, invoices, stock deliveries.
- The alert system is a generic concept that can be used in any module.

34.3 Links:

-
- Module: warning

CHAPTER

THIRTYFIVE

DASHBOARDS

Dashboards give you an overview of all the informations that is important to you on a single page. The menu gives you access to predefined boards for Accounting, Production and Project Management.

Unlike most other ERP systems and classic statistically-based systems, Open ERP lets dashboards be provided to all of the system's users, and not just to directors and accountants.

35.1 Key points:

- Dashboards are dynamic, which enables you to easily navigate around the whole information base.
- Dashboards are adaptable to the needs of each user and each company.

35.2 Integration benefits:

- Users can each have their own dashboard to enable them to manage their own work efficently.

35.3 Links:

- Module : board
-

CHAPTER

THIRTYSIX

WEBMAIL

Open Object integrates a full featured webmail. It allows people to work, manage and read email through a single interface containing all services of the company. It's a fully integrated system, with a drag and drop ergonomy and full use of Ajax to faster the application.

This is the very first extensible webmail system ever made. With the Open Object view designer, you can customize every interface to fullfill your specific needs and improve your productivity.

36.1 Key Points:

- Support for POP, IMAP and SMTP
- Connects automatically on your existing accounts

36.2 Integration Benefits:

- Attach files, report from Open ERP or documents from the DMS.
- Link any document of the system in your emails (sales order to confirm, documents from the project management, etc.)
- Use the object and view designer to extend the email interface to customize according to your needs.
- A single point of access rights management.

36.3 Links:

- Module: webmail

CHAPTER

THIRTYSEVEN

WIKI ENGINE

The Open ERP wiki allows you to manage your enterprise's contents using wiki restructured texts. This module provides a collaborative way to manage internal FAQs, quality manuals, technical references, etc.

37.1 Keypoints:

- Same formating style than MediaWiki,
- Any number of wiki groups for different purposes,
- Detailed history on all pages,
- Integrated with the document management system.

37.2 Why you should use the Open ERP integrated wiki than a separate wiki system ?

- Allows links to any document of the system,
- Uses the access controls of Open ERP for unique access rights management,
- Use it to describe projects, tasks, products,
- Integrated with customers portal to provide restricted external accesses,
- Linked to users processes for quality manuals.

37.3 To get more information:

- Basic Wiki Editing
- Wiki Documentation
- The Open ERP website

37.4 Links:

- Modules: wiki

Part IX

Business Process Management

CHAPTER

THIRTYEIGHT

BUSINESS PROCESS MANAGEMENT

Open ERP supports technical workflow and also end-users processes. It provides an easy and visual way to manage the different processes of your business and to improve your quality manual.

38.1 Key Points:

- Integrated process designer to customize or integrate your methodology,
- Help the user to understand the globality of the company,

38.2 Integration Benefits:

- Integrated to the document management system to provide samples of documents at any step
- Integrated with workflow to evolve in real time according to the reported document

38.3 Links:

- Modules: process

CHAPTER

THIRTYNINE

WORKFLOW ENGINE

The complete logic of all documents is managed through the powerful workflow engine of Open ERP. This system allows to be very flexible and adapt the way the application is running to your own specific need.

39.1 Key Points:

- Subflow management
- Event-Trigger system
- Adapt workflows using the workflow editor

39.2 Integration Benefits:

- Integrated with end-users processes
- Allows to modify the logic of all the modules without development
- Server actions interface

Part X

Association Management

CHAPTER

FORTY

EVENTS ORGANISATION

The event module allows you efficiently organise events and all related tasks: planification, registration tracking, invoicing, attendances, getting the payments, etc. It is completely integrated with the CRM and accounting modules. You can also use the mail gateway to get information requests or registrations directly by email.

40.1 Key Points:

- calendar view and customer portal to make online registrations,
- emails integration to automaticly confirm and send acknowledgements for any registration to an event,
- automatic invoicing based on registrations.

40.2 Integration Benefits:

- Integrated to the project management module for retro-planning of tasks,
- Integrated to the CRM to sell to track customers and opportunities or invite them the events,
- Automatic invoicing through the accounting modules.

40.3 Links:

- Modules: event

CHAPTER

FORTYONE

FUND RAISING

The fund raising module allows you to manage your fund raising operations. From the searching of investors/donors, to the tracking on how the money is used accross your different projects and resources.

41.1 Key Points:

- Independent or part of the association management module,
- Pre-configured and easy to start with,
- Lots of dashboards and reporting available.

41.2 Integration Benefits:

- Fully integrated with CRM tools: automatic segmentation, report designer, campaign management, email gateway, etc.
- Integrated with analytic accounting to track how the money is used.

41.3 Links:

- Module: crm_configuration

CHAPTER

FORTYTWO

MEMBERSHIP

The membership module allows associations to manage their members. From the search of new members to the periodical invoicing of current members. It's linked to the portal module to allow you to provide online access to members on your system: calendar of events, current projects, members lists, etc.

42.1 Key Points:

- Free members, fixed price, associated members, price management.
- Automatic invoicing and propositions
- Configurable workflow

42.2 Integration Benefits:

- Integrated with accounting for membership invoicing
- Integrated to pricelists to provide specific prices for members
- Integrated with portal to provide access to members

42.3 Links:

- Module: membership

Part XI

IT Tools

CHAPTER

FORTYTHREE

BUG TRACKER

The Open ERP bug tracker allows you to manage bugs and features requests. It manages the different revisions, milestones, status of bugs, link bugs to tasks in the project management module, etc.

43.1 Key Points:

- Email Integration (send mail to open bugs)
- Configurable rules to automate actions
- Powerfull dashboards
- Multi-Projects

43.2 Integration Benefits:

- Integrated with the Wiki (to manage bugs like the Trac software)
- Integrated with timesheets for costs and time control
- Linked to project management for fixes organizing and planning
- Link bugs to others resources like sales, claims, products, etc.

43.3 Links:

- Module: crm

CHAPTER

FORTYFOUR

SCRUM METHODOLOGY

This modules implements all concepts defined by the scrum project management methodology for IT companies: projects with sprints, product owner, scrum master, sprints reviews, daily meetings, feedbacks, product backlog, sprint backlog, etc.

The scrum module allows to easily manage long-term roadmaps, frequent evaluation of works, customers interaction, etc. It provides interresting reports like the burndown chart. The scrum methodology is used by Microsoft and Google to manages all their new products.

44.1 Key Points:

- All scrum concepts implemented
- Helps you to keep into control of your development project

44.2 Integration Benefits:

- Integrated with project management to manage scrum and non-scrum projects at a central place
- Integrated with gantt and calendar views

44.3 Links:

- Module: scrum
-
- Module:

Part XII

Fully customizable

CHAPTER

FORTYFIVE

CONFIGURABLE ACTIONS

The Open Object engine allows you to customize all actions of the system in a few clicks. You can easily define new objects, modify workflows, change the result of actions, open new windows or reports, etc.

45.1 Key Points:

- Full customization of every part of the software without development
- Integrated with the module recorder to save your customization

45.2 Integration Benefits:

- Triggers actions from anywhere: workflows, views, buttons, etc.
- Use workflow and view designer to adapt screens according to your requirements

45.3 Links:

- Module : base
-

CHAPTER

FORTYSIX

REPORT DESIGNER

This plugin connects Open Office with OpenERP to ensure that useful informations are coordinated and shared across the company. With a few simple clicks, users can open reports and lists in an Open Office document and modify it from their favorite document application. It can be included into various OpenERP modules, including : Accounts, Opportunities, Leads, Cases, Contacts and more.

46.1 Key points:

- Link between users and open office documents on mailings
- Creation and designing of reports from Open Office
- Easy to install and use

46.2 Integration benefits:

- Allows to easily customize all existing documents of Open ERP
- Create new documents and save them as modules to easily deploy and distribute
- Automates all your frequent document composition
- Integrated to marketing campaigns management

46.3 Links:

- Module: base_report_designer

CHAPTER

FORTYSEVEN

VIEW EDITOR

The Open ERP view editor allows you to design and adapt all screens of the application to your specific need. You can modify the look or add/remove new fields in a few seconds.

47.1 Key Points:

- Modify views but also the object structure
- Works with inheritance of views to not change official version
- Ability to save all modification in a reuseable module

47.2 Integration Benefits:

- This customization tool works on all modules

CHAPTER

FORTYEIGHT

WORKFLOW EDITOR

As part of the integrated Business Process Management engine of Open ERP, the workflow editor allows you to change the logic of all document processing to adapt it to your enterprise needs. The flexibility of this system will allow your software to evolves with your company needs as a daily basis.

You can triggers actions on any activity of the workflow: sending email/SMS, printing reports, computing values or modificating objects, triggers others workflows, call external services, etc.

48.1 Key Points:

- Automatic migrations on new versions with the Open Object smart migration technology
- Drag and drop graph editor to simplify user interface

48.2 Integration Benefits:

- Allows you to adapt the logic of all processus of existing modules
- Integrated with user friendly processes and documentations

Part XIII

Ergonomy

CHAPTER

FORTYNINE

WEB APPLICATION INTERFACE

Open ERP provides a full Ajax, web 2.0 web client allowing amongst others, drag&drop, Gantt graph, editable processes, etc. The web interface allows remote access and an easy deployment of the client

49.1 Key Points:

- Support lots of different views: gantt, calendars, processes, etc.
- Template engine to customize the look and feel and adapt to your corporate identity
- Extremely user-friendly: drag & drop, ajax enabled, dynamic graphs,
- Fast and Ajax enabled

49.2 Integration Benefits:

- All modules developped on Open ERP works directly on the web and application interface.
- No need to restart the server to add new features

49.3 Links:

-

CHAPTER

FIFTY

GANTT CHARTS

Every object of the system can be view as a dynamic gantt chart for an easy management of the resources and their planification. You can organise your resources using drag and drop in the timeline or between different consolidations.

50.1 Key Points:

- Browse at the resource or at the consolidation level
- Fully support drag & drop horizontal (time) or vertical (across resources)
- Support filters and efficient zoom in or out

50.2 Integration Benefits:

- Supply chains organizing and planning
- Streamline manufacturing operations and work at the workcenter consolidation level
- Easily plan resources on your projects and detect bottlenecks

50.3 Links:

- Module:

CHAPTER

FIFTYONE

DYNAMIC GRAPHS

Open ERP provides nice graphic reports to provide the right information to the user according to the context. All graphs and dashboards in Open ERP are fully dynamic, you can click on any part of the graph, drag and drop in dashboards, switch to calendar or gantt views, etc.

With Open ERP, powerfull reporting are not only dedicated to managers, but to any user of the system. Uses the 200+ reports to satisfy every employee's need and improve their performance by providing them the right information.

51.1 Key Points:

- 6 Views on all objects: list, form, graph, calendar, gantt, process
- A good ergonomy, fully Ajax, clickable and drag and drop enabled,
- All graphs are fully customizable using the view designer.

51.2 Integration Benefits:

All Open ERP document may be seen as a graph, gantt, process or calendar view. Here are a few examples: manage manufacturing chains with gantt, calendar of consolidated CRM events, customized dashboard for managers, planning of deliveries, etc.

Links

- Modules:

CHAPTER

FIFTYTWO

INTEGRATED DOCUMENTATIONS

Open ERP is the most documented enterprise management software in the world. Our books are Amazon best-sellers for all computer software categories and all management related categories. They not only covers how to use the software but also integrates best-practices and how to apply them in your enterprise with the help of Open ERP.

All these documentation are provided online and linked to any screen of the software so that it can efficiently help all your users to work efficiently with the software.

52.1 Key Points:

- Books are integrated in Open ERP for contextual help
- Documentations for users, integrator, developpers and the community

52.2 Integration Benefits:

- Covers main modules of Open ERP and how they fit together

52.3 Links:

-

Part XIV

Flexibility

CHAPTER

FIFTYTHREE

MODULE SYSTEM

Open ERP (and the Open Object framework) is probably the most advanced and flexible framework in the world. All features of Open ERP are packaged as independant module, allowing you to install only a few or a bunch of them. They are able to work independently and, if installed together, they perfectly integrates themselves to automate all tasks and avoid duplications of data.

You can also generate your own module without any line of development, using our customization tools: workflow editor, object editor, view designer, report designer, BI reports, customizable actions, etc. All customisations made on the server can be saved as a module to easily deploy, redistribute and share.

53.1 Key Points:

- Integrated ORM, Workflow Engine, BPM, BI,
- Model View Control with lots of available views,
- A very fast engine.

53.2 Links:

- List of modules

CHAPTER

FIFTYFOUR

WEB SERVICES

Every object or service of the application is accessible through different web-services standard: XML-RPC, XML-RPC over HTTPS or Python NET-RPC for faster accesses. It allows you to easily integrate any application or machine to the Open ERP server for a maximum of productivity.

54.1 Key Points:

- XML-RPC is accessible on any language: .NET, Java, PHP, etc.
- Three different protocols supported
- HTTPS support
- By default on every object of the system

54.2 Integration benefits:

This flexible technology allows us to propose you automatic synchronisation modules for most common open source software: ecommerces, mails, mobile phones, synchronisation of datas, etc...

Part XV

eCommerce

CHAPTER

FIFTYFIVE

INTEGRATED E-COMMERCE

Open ERP provides modules to synchronise automatically with all main open source eCommerce systems: OSCommerce, eZpublish, Magento, Joomla. It allows you to streamline and automate the sales process, from the online order to the delivery and the invoicing.

In order to benefit from all the power of Open ERP (pricelists management, complex taxes, warehouse integration, etc.), you can also use our own eCommerce system that automatically plugs in an existing website. Add a few lines of HTML in your website and Open ERP turns it as a full featured eCommerce platform.

55.1 Key Points:

- Portal access for customers to manage their accounts and orders,
- Integrated with most popular eCommerce or builtin existing module

55.2 Integration Benefits:

- Streamline your sales process, from the website to the delivery
- Effective stock visibility and customer special prices computations
- Take benefit of marketing campaigns and CRM integration to increase your sales

55.3 Links:

- Module: ecommerce

CHAPTER

FIFTYSIX

INTEGRATED SYSTEMS

Introduction two or three lines.

56.1 Key Points:

- Key point 1
- Key point 2

56.2 Integration Benefits:

- Integration 1
- Integration 2

56.3 Links:

- Module

CHAPTER

FIFTYSEVEN

EDI

The Open Object framework provides lots of tools to help you synchronise your databases or import new data in Open ERP. Tools dedicated to some software (ecommerce, crm, etc.) are also provided. The EDI module allows you to synchronise orders and deliveries with you suppliers and customers.

It is used to synchronise Open ERP with SAP in distributions and food industries companies.

57.1 Key Points:

- Operationnal in a few clicks

57.2 Integration Benefits:

On module to synchronise different documents:

- Sales orders, purchases, deliveries, etc.

57.3 Links:

- Module : edi

Part XVI

Business Intelligence

CHAPTER

FIFTYEIGHT

OLAP DATABASE

The Olap module of Open ERP support a full featured hybrid OLAP database that can connect on any kind of relational database to perform multi-dimensional analysis. Open Object supports MDX queries performed through one of the web-services provided by Open Object.

58.1 Key Points:

- Design schema in a few minutes with the cube designer
- Use the cube browse or the CLI client to analyse the results

58.2 Integration Benefits:

- Open ERP modules have pre-configured schema to help start analysing your data directly
- You can perform queries from Open ERP or from any other software

58.3 Links:

- Module : olap
-

CHAPTER

FIFTYNINE

CUBE DESIGNER

The business intelligence cube designer allows you to customize cubes on any kind of databases (Oracle, MySQL, PostgreSQL, etc.) The user friendly cube designer will help you to design full schema in a few minutes.

59.1 Key Points:

- Detect every structure automatically by introspection,
- Support an application dictionary to auto-configure setups,
- You can get a full Business Intelligence suite up and running in 5 minutes,
- Lots of pre-configured dimensions and measures supported,
- Get reports on all applications from a central control center.

59.2 Integration Benefits:

- The Open ERP schema is pre-configured, no need to define a cube,
- The cube browser will allow end-users to navigate into any query,
- Every document of Open ERP can raise a cube browser for analysis.

59.3 Links:

-

CHAPTER

SIXTY

CUBE BROWSER

The Business Intelligence cube browser allows end-users to easily navigate through the informations and statistics of the company and design their customized reports in a few drag & drop. You can consolidate, drill up, drill down, slice, filter data to benefit from a very user-friendly report interface.

The power of Business Intelligence becomes available to all users of the system to extract the exact informations needed from any screen. It is also able to analyse others databases, to allow you to consolidate data in one single user interface.

60.1 Key Points:

- User-friendly: drag & drop, easy to use, pre-configured.
- Complete: slice, filter, drill up, drill down, relate, etc.
- Analysis in real time.

60.2 Integration Benefits:

- Use the powerfull Business Intelligence engine to report on all modules,
- Schema for Open ERP modules are already pre-configured,
- Respect Open ERP access rights to simplify configuration.

60.3 Links:

-

Part XVII

Miscelleanous Tools

CHAPTER

SIXTYONE

NETWORKS

Open ERP has modules to help you to manage and maintain your IT infrastructure. You can manage your softwares, licences, hardwares, waranties and control interventions on the different components. Each components can be linked together to design your network infrastructure.

61.1 Key Points:

- Manages networks, hardwares and softwares
- Track changes and interventions on components

61.2 Integration Benefits:

- Install the module in three clicks
- Access controls related to users rights

61.3 Links:

- Modules: network

CHAPTER

SIXTYTWO

IDEAS BOX

Sometimes the smallest modules are the most usefull ones. The “ideas” module has been developped in 3 hours. It allows employees to suggest ideas, sorted in different boxes or subjects. Then, people can rate the proposed ideas and discuss on the different points.

62.1 Key Points:

- Very simple module to track employees’ ideas,
- A workflow allows to track ideas efficiently,
- A discussion system on ideas,
- A rating system.

62.2 Integration Benefits:

- Integrated with the wiki to easily describe ideas

62.3 Links:

- Module: idea

CHAPTER

SIXTYTHREE

LUNCH

Open ERP has lots of modules to simplify and automate your daily activities. The lunch module allows to track employee orders for lunch time, their preferences, the cost of their lunch, etc. It automatically prepares orders for the suppliers and manages employees preferences.

63.1 Key Points:

- Cost control and amount due per employee if they have to pay their lunch,
- Automatic orders to suppliers,
- Consolidation of the requests for the whole company,
- Cashbox management.

63.2 Integration Benefits:

- Linked with invoicing for accounting control

Links:

- Modules: lunch

CHAPTER

SIXTYFOUR

VOIP

The asterisk module allows to interface your Voice Over IP system with Open ERP. When a customer calls you, it can propose the automatically the partner form linked to this phone number.

64.1 Key Points:

- Asterisk interface

64.2 Integration Benefits:

- Integrated with the phone tools of the CRM
- Link on any document to call a partner

64.3 Links:

- Module: asterisk

CHAPTER

SIXTYFIVE

VERTICALISATIONS

Part XVIII

Services

CHAPTER

SIXTYSIX

AUCTION

The auction house profile contains all you need to manage an auction house. It allows you to manage objects and sellers, bids and buyers, to set-up exhibitions, to generate catalogs. It is integrated with the other modules of Open ERP providing automatic invoicing, cost control using timesheets, etc.

66.1 Key Points:

- Manages all operations of an auction house
- Fully integrated and very complete

66.2 Integration Benefits:

- Integrated with accounting and invoicing
- Integrated with human resources modules

66.3 Links:

-
- Module: profile_auction,auction

CHAPTER

SIXTYSEVEN

MEDICAL

Medical provides an universal Electronic Medical Record (EMR), so doctors and institutions all over the world, independently of their economic status, will benefit from a centralized, high quality, secure and scalable system.

67.1 Key Points:

- 100% paperless patient examination and history taking
- Patient Administration (creation, evaluations / consultations, history ...)
- Strong focus in family medicine and Primary Health Care
- Doctor Administration
- Lab Administration
- Medicine / Drugs information (vademécum)
- Medical stock and supply chain management
- Demographics and other statistical reports
- Financial Administration (Invoicing, ...).
- Designed with industry standards in mind

67.2 Links:

-
- Module:

Part XIX

Public

CHAPTER

SIXTYEIGHT

TRAININGS ORGANISATION

Open ERP is used by one of the most prestigious training organisation in France: l'ENA (Ecole Nationale d'Administration). Open ERP provides different module to organise trainings: resources management (classes), teachers, planning, training material, etc.

68.1 Key Points:

- Portal for teachers and students
- A dynamic gantt view to planify resources
- Fits all needs of a training organisation

68.2 Integration Benefits:

- Integrated with document management system for training material
- Based on analytic accounting to manage costs and revenues per course
- Integrated with invoicing, sales, CRM, etc.

68.3 Links:

- Module

CHAPTER

SIXTYNINE

CHAMBER OF COMMERCE

Open ERP is used by 50% of the Chambers of Commerce of Belgium. More than 10 modules are available for this specific business: advances CRM, contact management, membership management, training and conferences organisation, embassy folders, etc.

69.1 Key Points:

- Very complete
- About 10 optionnal modules

69.2 Integration Benefits:

- Integration with accounting to provide invoicing automation
- Integration with the CRM for a global overview
- Integration with the document management system

69.3 Links:

-

Part XX

Manufacturing

CHAPTER

SEVENTY

FOOD INDUSTRIES

Open ERP provides different modules for food industries companies. It is able to manage a full traceability of the products, from the supplier to the customer, including specific datas on each lot. The master production schedule allows a accurate tuning of your automatic procurements.

70.1 Key Points:

- Master Production Schedule for accurate planification of procurements
- Upstream and downstream graphical traceability
- Lot management system adapted to food industries
- Management of consumables

70.2 Integration Benefits:

- Sales triggers validity dates on lots,
- Traceability from purchases to sales

70.3 Links:

-
- Module:

CHAPTER

SEVENTYONE

BOOK STORES

Open ERP provides modules that configure automatically the system for a book store company. It allows to manages books, authors, editors and suppliers. It manages barcodes and sales from the website, from a point of sale, by quotation or phone.

71.1 Key Points:

- Integrates all the needs of a book store
- Ready to use, out-of-the-box.

71.2 Integration Benefits:

- Integrated with invoicing and accounting
- Integrated with Joomla website

71.3 Links:

- Module : bookstore
-