Standard ERP

Repetitive Invoicing

Repeat billing for many industries
Automated deferred income calculations
Handles renewals and reminders
Integrated service level agreements
Batch updates of underlying details

The World's Best Integrated Business Platform

Automate your invoicing processes and issue regular invoices over a range of dates.

Using the Standard ERP Contracts Module, set up regular periods to invoice your clients. Uses include fixed price support and maintenance agreements, memberships and other subscriptions, and some rental and agency arrangements.

Contracts

Standard ERP supports repetitive billing with the Contracts Module. For any arrangement where you wish to issue a number of invoices over a range of dates, you should set up a Contract. Typical uses include fixed price support and maintenance agreements, memberships and other subscriptions, and some rental and agency arrangements.

Each Contract has a start date and an end date, and the date the contract was entered into. You also enter the number of invoices you wish to print at any time, and the length of each invoicing period. This can be any number of days or months.

Having set up the rules for repetition of invoices, you then set up the invoice itself. Tabs on the Contract screen are similar to the tabs for entering normal invoices to the Sales Ledger.

Example:

If you set the length of the invoicing period to 3 months, and the number of invoices to print at any one time to 3, you can produce 3 invoices for a quarter at one sitting, with invoice dates separated in monthly intervals. Other settings will allow you to produce one invoice in a quarter with three line items, one for each month, on it or one invoice per quarter with one line item for the quarter on it. Periods can be days if required.

Invoicing

Standard ERP supports detailed reporting on the value of invoices to be raised in a given period, selectable on various criteria including Contract type, Customer, and Contract number. You have the chance to check

what will happen before running automated invoicing routines, so you can proactively correct any problems.

The batch routine for creating invoices runs in an identical way to the report, but instead of creating a report it creates the invoices themselves. The invoices are unposted, allowing checking and either batch or individual posting. The invoice dates default to the current date, but can be overridden with automatic features. You can force the invoice date to be calculated from any number of days before or after the Contract date.
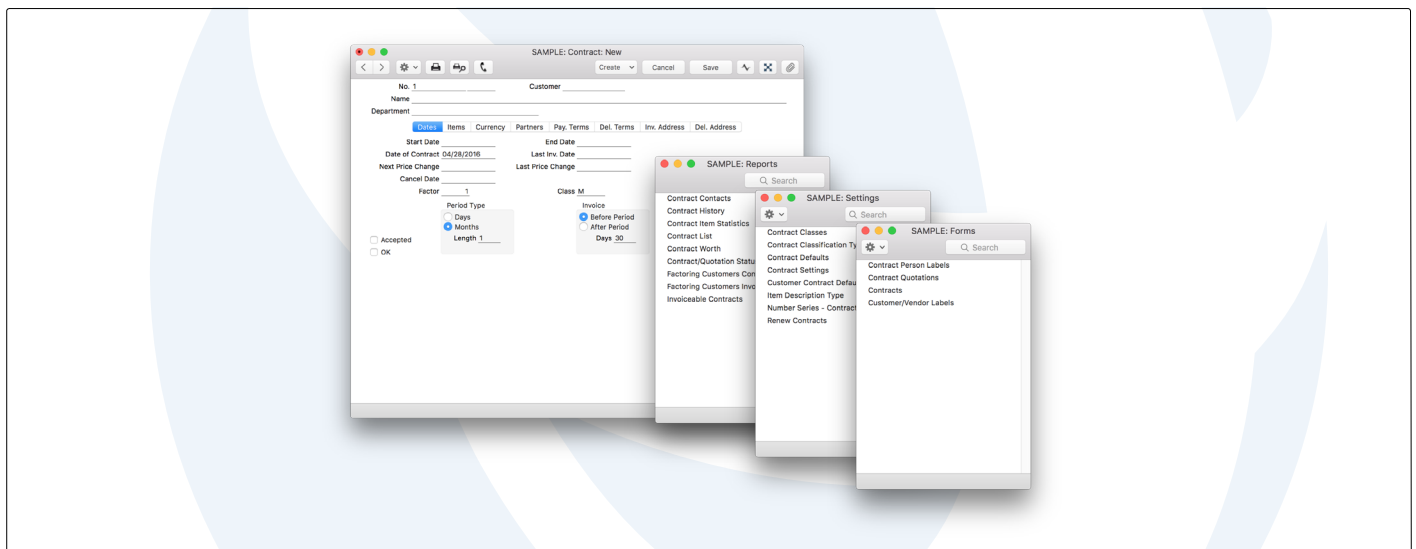
Deferred Income

Each Contract allows a different pattern to be created for releasing of deferred income. A single invoice for annual maintenance, for example, will usually be split equally over the twelve months. Standard ERP handles automatically the creation of the forward entries releasing income from deferred income, holding them as pending entries. At any time you can report on what has been posted to deferred income, and what remains to be released.

"Everything works in a truly integrated manner...invoices for equipment can create maintenance contracts."

Roger Cherowbrier, Topcon

Integration with Customer Relationship Management

Standard ERP can be configured automatically to create an Activity in a To Do list for a given person or group of people. For example, this can be used to handle the date-based reminders to mail renewal letters or telephone customers to chase for subscriptions as a contract becomes due. Once in the system, as explained in more detail in Standard ERP

and CRM, it is possible to automate the creation of further reminders at a preset periodicity, such as annually.

Standard ERP also has Service Agreements. Aside from reporting, this supports automated routines for scheduling visits from service engineers.

Quotes and Status

Quotations for contracts can be created within the Contracts Module and their status tracked to include issue, acceptance, credit hecks, contracts issued and so on. Upon acceptance of a quotation, a contract can be created with a single command and without rekeying details. The status of the contact and the invoicing status of a customer with payment history are instantly viewable on screen.

Updating Contracts

During the term of a contract, details of things in a contract may change in other parts of the system - customer details and terms, item descriptions, characteristics and costs and other relevant settings. A simple maintenance function - Update Contracts - will refresh contracts with these new details automatically without having to edit many existing contracts.

Circulation Contracts

For publishing-type contracts, a simple export of circulation details permits the printing of labels, letters etc for fulfilment purposes.

Service Level Agreements

You can set up a series of Activities that will take place with a given type of Service Agreement - for example regular preventive maintenance. Set the frequency of each type of Activity, the interval between Activities, who will perform the task and the grace period following the start of the contract before the first Activity. Standard ERP can then automate the creation of all the necessary Activites into the graphical schedule. You can create generic team members if you're not ready to allocate tasks to individuals - Standard ERP's drag and drop allocation between people is ideal for this, as you can make the allocation to individuals when you're ready.

Integrated Business Platform

Standard ERP is an Integrated Business Platform, offering solutions for almost all the departments of a small or midsized business. All the solutions are offered in a single application, with full interaction between each component. As a result, to look at Repetitive Invoicing in isolation is to miss the key differences and benefits of Standard ERP's approach:

- an architecture that reduces reliance on IT hardware, allowing organisations to focus on their business rather than their infrastructure

- users are given visibility of data from other disciplines (subject to access rights), which enriches their jobs. For example, credit controllers can see promises made by salespeople and problems with service management that might be holding up payments

- automations can interact across disciplines, for example allowing marketing to create automated mailshots based on customers who have not yet bought an extended warranty on a given item

- reporting is improved by the co-existence of data from different parts of the business. For example it is simple to produce Profit and Loss reports and Balance Sheets that includes committed costs and GRN accruals

- training is faster and more effective than for companies implementing multiple solutions, as there is a common approach

Mobile Solutions and Wide-Area Networking

All of the Standard ERP functionality is available to users logging in from anywhere in the world, from a variety of devices. Users can work from home or while on the road, logging in from any internet connection, whether broadband, or over a mobile phone network. Devices can include laptops, Windows Mobile real-time barcoders, and iPod Touches and iPhones. Users can run any of Standard ERP's standard or customised reports in real-time, and enter or review any data record. This breaks down the walls of your operation, allowing users to be productive wherever they are.

Modules

- Accounts Payable
- Accounts Receivable
- Business Alerts
- Cash
- Checks
- Conferences
- Consolidation
- Contracts
- Course Booking
- Credit Management
- CRM
- Customs
- EDI
- Email
- Expenses
- Fax
- Fixed Assets
- General Ledger
- Group Calendar
- Hotel
- Human Resources Management
- Internal Inventory
- Inventory
- Jewelry
- Job Costing
- MRP
- Point of Sales
- POS Offline
- Pricing
- Production
- Purchase Orders
- Quotations
- Rental
- Report Generator
- Resort
- Resource Planning
- Restaurant
- Sales Orders
- Service Orders
- Share Trading
- SmartView (Business Intelligence)
- Task Manager
- Telephone Log
- TimeKeeper
- Warehouse Management
- Webshop and CMS

Technologies

- Business Communicator (Asterisk, Skype and TAPI)
- Forms Designer
- HAL Customization language
- Intelligent Routing
- Interfacing Toolkit
- Massive Cacheing
- SQL Shadowing
- SmartApps Designer
- Wide-area Networking

Internet Services

- Address Lookup
- Credit Card Payment
- Credit History
- E-invoicing
- Electronic Bank Services
- Electronic VAT Return
- Exchange Rate Lookup
- Postcode Lookup

Company profile

HansaWorld is a major international software company specializing in business optimization solutions. The group employs around 300 staff in a strong network of daughter companies and distribution partners worldwide. There are offices in 19 countries spanning all the major continents, allowing HansaWorld to offer international implementations with a single point of contact across many countries.

The group was founded in Sweden in 1988, by Managing Director Karl Bohlin, and is currently headquartered in Ireland. The products are available in 27 languages and work with almost all computers and operating systems. There have been more than 550,000 HansaWorld installations at a wide range of organizations, from small and medium-sized businesses to entrepreneurial divisions of larger companies.

HansaWorld is one of the leading drivers to bring a new perspective to corporate software business needs. Traditional software companies continue to push a silo approach involving developing an Standard ERP Resource Planning application that is difficult to integrate with other components such as Customer Relationship Management, Email, Document Management, Workflow and vertical market solutions. HansaWorld has pioneered the approach of developing solutions that cover almost all the company's main business needs in a single, integrated solution, and by underpinning these with constant technological innovation. As a result, this Integrated Business Platform unifies processes across all departments, through advanced software-based best practices which thereby improve the flow and value of business transactions to deliver time and cost savings at every level without compromise.

HansaWorld provides local product management for each market where it actively sells Standard ERP. This process covers not just translations (if required), but also localization for statutory and commercial practices, and ongoing quality control.

Product Strategy

Standard ERP's advanced and successful user interface was first developed for Apple Macintosh in 1988. In 1994, when the program was ported to Windows, it had already been proved by thousands of users. HansaWorld's experience with international sales and modern technology puts it in the perfect position to meet the challenges of the next decade.

HansaWorld provides a wide range of technologies for e-business including internal and external email, several webshop solutions and PDA support. In addition, HansaWorld can help to build a corporate portal. Standard ERP is developed using C++ as its programming language, and proprietary technology for database design and for network communication. This allows HansaWorld to have the same products available for several different operating systems, each version optimised for maximum performance.

Currently Standard ERP is available for Windows 2000–XP, including Windows CE, Mac OSX, Linux and AIX, Symbian S60 and iPhone.

Certified HansaWorld Business Partner:

01-02-2013

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