

SERP Introduction Demo - part 1

Preparation before the demo

Start with a greeting, introduction and company presentation

Don't forget to use the helpful tips document before getting started so that you know what they are looking for ahead of the demo.

If it's a big client make sure you do a pre-sales customer site visit and try to meet as many of the key people as possible and do a thorough walk around of the business to try to understand their needs in preparation for the demo.

Introduction

Welcome to this demonstration where I will give you a quick overview of Standard ERP.

Access rights

First, we'll take a look at logging in and access rights. This is how a user accesses the system.

ACTION: Log in with SJ

Navigate to the module list

Explain the list of modules and briefly highlight the ones the customer is interested in

Here, we have the System module. One of the important settings located in this module is Access Groups. This is where role based access rights can be set up, saving time when adding many users.

ACTION: Log in with EK

Show that EK has only a few modules to choose from

Here, you can see that "EK" only has a limited number of modules to access. You can also restrict user access to limited information such as, costs and gross profit.

ACTION: Log back in with SJ and show fact he has more access

You can see here that user SJ has more access.

Note that Standard ERP allows for multi window workflow.

ACTION: Open Module>Quotations>Register Quotations>New and open Module>Purchase Invoices>Register Purchase Invoices>New
Leave both of these open

From the Navigation Center, you also have access to email, workflow overview and personal desktop. Let's take a look at these.

Demonstrate Personal Desktop

The personal desktop allows you to put the tools and reports of your choice within easy reach, - just one click away.

ACTION: Drag the Purchase Invoice register to the Personal Desktop

Navigate to the Nominal Ledger Module

ACTION: Open Reports

Here is a list of standard reports in Standard ERP. There are over 400 standard reports that can be run in more than 6000 ways. You can also make your own reports using the report writing tools.

ACTION: Drag the Profit and Loss Report to the Personal Desktop and open it

This is one of my favourite management tools - the Profit & Loss report– it allows you to stay in control of your business.

ACTION: Show Profit and Loss report specification window.

You can run this report for various options, such as a specific period, - a budget period, - and a method of rounding.

ACTION: Show the other two reports, P&L by Mnth and vs Budget and say

There is the option, for example, to run the Profit & Loss report by month, showing all months on the same report or against a budget.

These are standard reports and can be modified to suit your needs.

The report layout here will remain basic for demonstration purposes, but you have the option to design your own.

Demonstrate the search on the report

Standard ERP's reports are unique in the way that you can easily search through an extensive report and locate both amounts and text.

ACTION: (demonstrate this whilst talking, first search for a figure e.g 50.00 and then look for the word telephone and report will take you to the telephone account)

Do you see a useful purpose for this in your own business?

ACTION: (Part of demo data preparation)
create sub account for sales - miscellaneous and make sure you have some invoices using items with this Object – miscellaneous, item group and classification, on one item (not miscellaneous) select this object and item group incorrectly and sell the item to create invoices.)

Now, when we go to sales accounts in the report, I notice that the sales by miscellaneous figure is too high. As we recently re-categorized all inventory, there should be limited or no miscellaneous item sales

ACTION: Search for the word sales and move to the Sales Account

This shows us a list of General Ledger transactions, or Nominal Ledger in other countries, all posting to the sales account.

ACTION: Point at the blue underline whilst explaining

Data underlined in blue links to more data, - and by selecting it, we can drill down to the next level from within the report. Standard ERP makes it quick and easy to browse transactions through reports in this manner.

ACTION: Click on the Sales account for Miscellaneous stock (blue link)

Note that this is not a read-only drill-down to a screenshot as with other systems. This is much more as you will see throughout this demonstration.

We can see on this transaction that the object type is MISC, - so far so good, - so I will need to investigate further and get to the source document to see if indeed a miscellaneous item was sold.

ACTION: Go to Operations menu 'Open Subsystem record'

When I open the Subsystem record, I notice that the details on the invoice are flutes, not "Miscellaneous". I can press F2 on the item listing to bring up the item card.

Here, I notice that the item group is incorrectly set up, as well as objects. This explains the incorrect reporting in the Profit and Loss report.

So, without closing any windows, and because I am an admin user, I can quickly fix the problem right here and now.

ACTION: Change these by selecting the correct ones and update.

Now this will fix the issue for future transactions, but we still need to correct the problem with the report.

ACTION: Close the item card and go back to the invoice screen

Standard ERP offers easy access to all related documents of your business transactions. Notice the invoice has a highlighted paperclip and links icon, indicating attachments. I'll select them to view.

ACTION: Click on the links to show that you can further see from the invoice that there was a delivery (open and show), sales order (show) and quotation(show)

These records were automatically added to the invoice when it was processed.

We can see all related documents for this invoice, like the quotation, sales order, and delivery. We can also check records such as gross profit and cost on the invoice to ensure we made a profit. This information is stored per invoice and we can run a gross profit percentage invoice report as well.

ACTION: Go to TAB C on the invoice screen and show the GP and costShow the reports available under Module>>Accounts receivable>>Reports highlight the GP invoices report and run to screen

You can see that any report in Standard ERP has a similar Report specification window where the report can be run in many different ways.

ACTION: Select Sales person SJ and run the report

We can see from this report that our salesman, Samuel Jackson, has sales with a profit of 22.61 percent for the period selected. It appears he really does deserve his bonus.

ACTION: Move the window aside and come back to the NL transactions window for the incorrect invoice

Getting back to our problem, let's correct the General Ledger entries to the Miscellaneous sales account, - and put those amounts where they belong so that the report reflects the true situation.

ACTION: Create an update mark by going to the Operations Menu on the transactions window and click Update mark

We can log date and a snapshot of every change that is made in the system, whilst keeping a copy of the original record using the update mark. .

ACTION: Explain the date stamp and user ID of person doing the correction.

The system automatically records the person doing the change and the old transaction date.

ACTION: Create the new entry and delete (red line) through the old one. Do that for all entries required. Show what happens if you forget to add objects.

Now that we have created an update mark, I can quickly enter in the information, copying from above as the information is mostly correct, with exception to the Object selected, which should be "WIND" and not miscellaneous.

Then I can go to the old transaction, - and delete it.
The system will put a red line through it.

So, at any time, I can easily review which transaction lines were changed and by whom. How many endless hours have you spent trying to reconcile mis-postings with correction upon correction? This functionality removes that headache.

I can now try to update, but I notice the system does not allow this as I have forgotten to add some relevant information from the original line. I now realize I've forgotten to add back the object codes enabling the system to slice and dice the reports into different views.

In this case, the Objects are C1, Company SJ, sales person Victoria, and WIND instruments.

I will demonstrate how these Objects work in more detail in a moment.

ACTION: Add back all the objects including the correct item object and save. Then go to paperclip and add a note explaining reason for correction.

We can also add notes and attach spreadsheets to provide explanations for our General Ledger entries and corrections.

ACTION: Type Date initials The object and item group were incorrectly set to MISC when the item sold was a flute. Corrected for future on the item card and now correcting the incorrect NL transaction created.

I am certain this note will save time and money when the auditors come around.

You can add anything on the paperclip, such excel spreadsheets explaining how you calculated certain

account postings. This is much easier than looking for separate notes kept on your PC.

All company information is stored in Standard ERP, making it more efficient and saving time. The attachments are stored on the server, meaning they are easy to retrieve from anywhere.

ACTION: Re-run the NL transactions with corrections to show that the report tracks changes keeping the original entry.

You can see here that we track all changes made and they are easy to identify.

Now, lets re-run our profit and loss report to see what happened.

ACTION: Refresh the P&L and show that the changes are instant.

Let's look for that account again and see that the results have changed, accurately reflecting the position. We can now either print and show the new report to the boss, - email it, - print to Excel and work on it, - or just call and ask the manager to view it on-screen.

ACTION: Show the print options whilst talking

Standard ERP offers you the tools to make accounting easier!

ACTION: Close all the windows and come back to the Navigation Centre

Can you see the benefit in a system as easy to use as Standard ERP?

Your staff can work much faster and more efficiently, saving a lot of time and money to ultimately increase profitability.