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Homework 3: “Dolibarr ERP+CRM Investigation”

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**1. Why Dolibarr is considered an ERP and CRM information system?**

Because it is a modular software for the business management of PYMES, independent professionals, entrepreneurs or associations.

**2. Write and explain three reasons for using Dolibarr in any company?**

* *It is easy to use.*

The management of the system needs a training to express all its functionalities. With Dolibarr, learning is minimal and inexpensive.

* *It is easy to implant.*

One of the main characteristics of Dolibarr compared to other ERP and CRM solutions, is its easy implementation.

* *It is easy to develop.*

Dolibarr to be developed in well-known standards, it is very easy to develop new features, or vary existing ones.

**3. What type and size of company Dolibarr is focused to? List 3 success histories.**

For small and medium businesses, freelancers or associations.

AEAT State Agency Tax Administration Spain

Implementation of a warehouse management of non-inventory items.

WURTH

Wurth Colombia

ERP / CRM implementation for the optimization of specific processes in critical areas such as financial, accounting and administrative.

MECHATRONIC

Labeling machines Mechatronic SL

Manufacturers of machinery in the sector of the labeling, the needs were to be able to coordinate in the same ERP / CRM from budget-orders to payments and collections, and that, at the same time.

**4. Regarding technical support, training and other services, what does Dolibarr offer to users?**

Having all the necessary services to cover all the needs around the Dolibarr system. All of them separately, will cause that there are no interruptions in the work or the use of the system, and do not waste time for the solution of problems, improvements, updates.

**5. Describe the process to obtain Dolibarr, how much it cost?**

The price of Dolibarr is zero, you can download, install, parameterize, and voila! it has no license cost, since its own license is free, and also Open Source.

Process:

• Information about the ERP & CRM Dolibarr.

• Try our online demo and read our quick guide to use or the complete manual.

• Download Dolibarr.

• Installation of Dolibarr.

• Dolibarr configuration and parameterization.

• Data entry.

• External modules.

• Search for a hosting solution.

•Backups.

**6. What are the minimal hardware requirements to install Dolibarr?**

The minimum requirements for its installation are a server with an Apache 2.X distribution, MySQL 5.X, and PHP 5.2.X, "a server (AMP)".

**7. What is the process to install Dolibarr in a computer system?**

* The software is in the Downloads section.
* The standard distribution of the Dolibarr ERP requires a database, a web server, and a PHP configuration.
* Linux users can prepare the environment thanks to the utilities can be installed automatically using the supplied packages.
* Windows users, if you want to install Dolibarr on your own computer, you have available a self-installable for Windows that installs everything you need. This package is called DoliWamp.
* Mac users they also have an executable that installs everything you need; in your case the package is called DoliMamp.

**8. What is the Web server name and the Database name that Dolibarr uses to work?**

* Servers: Project based on a WAMP, MAMP or LAMP server.
* Databases: Apache, MySQL, PHP.
* Language:  PHP.

**9. Which are the modules included in Dolibarr? Write a brief description of each one.**

* User management: Control users, roles and groups.
* Products / Services: Manage all products and services.
* Financial Management: Control the entire financial part of your company.
* Commercial management: Manage your budgets, orders, work parts, customer tickets, contracts.
* Project management: manage your projects and obtain profit or cost margins.
* Customer CRM: complete customer tracking.
* Management to third parties: you can manage your customers, prospects, suppliers, and contacts.
* Point of sale: Make counter sales through the two Points of Sale.
* Contract management: Keep track of the expiration of periodic contracts with customers.
* Document management: all the documentation organized in your management system.
* Intervention management: Creation of interventions or parts of work done to clients.
* RR management. HH: Management of vacation requests, employee salaries, and relationship with projects.
* Agenda management: Creation and records of Dolibarr events and actions, and collaborative agenda.
* Member management: tracking your membership fees.
* System administration: Configuration and parameterization of the management system by the administrator.

**10.What external modules are demanded for the users of Dolibarr?**

* Multi-company module: allows working with several companies in a single Dolibarr system.
* Module 2 Reports: we will obtain reports in PDF, HTML, and CSV.
* Google module: Access to the Google API.
* Ultimate PDF module: modify your documents.
* Equipment Module: Serialization of products.
* MemCache module: accelerate the use of dolibarr through the cache.
* Paypal module: integration of Paypal with Dolibarr.
* ConcatPDF module: merging PDF with quotes, orders, and invoices.