

# ERP

Video Link :- [https://www.youtube.com/watch?v=6P5Mr3\\_Ccsk](https://www.youtube.com/watch?v=6P5Mr3_Ccsk)  
<https://www.youtube.com/watch?v=9bE75HG4-3A>  
<https://www.youtube.com/watch?v=NTiQZUXT61Y>

ERP stands for Enterprise Resource Planning

Q-1) What is ERP?

Ans :- ERP is a business management software which is used to integrate all the business activities in any organization.

# CRM

Video Link :- <https://www.youtube.com/watch?v=hnEQq7kNFWo>

**ALL THE BELOW MENTIONED MODULES CAN BE FOUND IN ANY ERP SYSTEM:**

<https://www.esds.co.in/blog/basic-modules-of-erp-system/#sthash.b2k3oldm.dpbs>

- Human Resource.
- Inventory.
- Sales & Marketing.
- Purchase.
- Finance & Accounting.
- Customer Relationship Management(CRM)
- Engineering/ Production.
- Supply Chain Management (SCM)

## Human Resource Module(HR):

Human Resource module helps to HR team for efficient management of human resources. HR module helps to manage employee information, track employee records like performance reviews, designations, job descriptions, skill matrix, time & attendance tracking. One of the important sub module in HR module is Payroll System which helps to manage salaries, payment reports etc. It can also includes Travel Expenses & Reimbursement tracking. Employee Training tracking can also managed by ERP.

### Inventory Module:

Inventory module can be used to track the stock of items. Items can be identified by unique serial numbers. Using that unique numbers inventory system can keep track of item and trace its current location in organization.

e.g. you have purchased 100 hard disk , so using inventory system you can track how many hard disks are installed , where they are installed, how many hard disks are remaining etc.

Inventory module includes functionalities like inventory control, master units , stock utilization reporting etc.

\* There may be integration of inventory module with purchase module of ERP.

### Sales Module :

Typical sales process includes processes like Sales queries & enquiry analysis & handling, quotation drafting, accepting sales orders, drafting sales invoices with proper taxation, dispatch/Shipment of material or service, tracking pending sales order . All these sales transactions are managed by sales module of ERP. CRM module can take help of Sales module for future opportunity creation & lead generation.

### Purchase Module:

As name indicates, purchase modules take care of all the processes that are part of procurement of items or raw materials that are required for organization. Purchase module consist of functionalities like supplier/vendor listing, supplier & item linking, sending quotation request to vendors, receiving & recording quotations, analysis of quotations, preparing purchase orders, tracking the purchase items, preparing GRNs(Good Receipt Notes) & updating stocks & various reports . Purchase module is integrated with Inventory module & Engineering/production module for updating of stocks.

### Finance & Accounting module:

Whole inflow & outflow of money/capital is managed by finance module. This module keeps track of all account related transactions like expenditures, Balance sheet, account ledgers, budgeting, bank statements ,payment receipts, tax management etc. Financial reporting is easy task for this module of ERP. Any Financial data that is required for running business is available on one click in Finance module.

#### Customer Relationship Management (CRM) module:

CRM department is helps to boost the sales performance through better customer service & establishing the healthy relationship with customers. All the stored details of customer is available in CRM module.

CRM module helps to manage & track detailed information of the customer like communication history ,calls, meetings, details of purchases made by customer, contract duration etc. CRM module can be integrated with Sales module to enhance sales opportunities.

#### Engineering / Production module:

Production module is great help for manufacturing industry for delivering product.

This module consist of functionalities like production planning, machine scheduling, raw material usage,(Bill of material)preparation, track daily production progress production forecasting & actual production reporting.

#### Supply Chain Management (SCM):

SCM module manages the flow of product items from manufacturer to consumer & consumer to manufacturer.

Common roles involved are manufacturer, Super Stockiest, Stockiest, distributors, retailers etc. SCM involves demand & supply management , sales returns & replacing process, shipping & transportation tracking etc.

Today many SMBs face challenges in their process automation. ERP is the great help for such organizations. ERP can efficiently streamline the business operations of organization. Above introduction of modules can help you to choose & customize the ERP modules depending on your organizations requirements.

# LIST OF MODULES AVAILABLE IN ODOO ERP

Imp :- <https://www.pptssolutions.com/odoo-development/>

- ✓ Website Building
- ✓ Purchase
- ✓ Accounting
- ✓ Sales
- ✓ Email Marketing, Mailing Lists
- ✓ E-Commerce
- ✓ Manufacturing
- ✓ Human Resources
- ✓ Customer Relationship Management (CRM)
- ✓ Appointments Setting
- ✓ Blogs, Forums, and Live Chat
- ✓ Helpdesk
- ✓ Inventory/Warehouse
- ✓ invoicing
- ✓ Marketing Automation

Sale Module :- <https://www.youtube.com/watch?v=rntuwpoxLX8>

<https://www.youtube.com/watch?v=JX9X5lKujuA>

Flow :-

create Lead -> fill up all necessary detail in lead form -> add customer one and save it. -> click convert opportunity button -> add relevant detail and select option -> select option in customer and click create opportunity -> click mark won -> click new quotation button -> enter needed data -> save it -> click confirm sale -> if you have seen invoice flow -> click create invoice flow -> click validate -> click invoices lines -> then click register payment -> click validate

Purchase Module :- [https://www.youtube.com/watch?v=i3\\_AM5uMVw8](https://www.youtube.com/watch?v=i3_AM5uMVw8)

[https://www.youtube.com/watch?v=Zx\\_5GbT8Evk](https://www.youtube.com/watch?v=Zx_5GbT8Evk)

<https://www.youtube.com/watch?v=soLSkuXZU1s>

<https://www.youtube.com/watch?v=lMmP2r70ZAM>

