Spotlight - Introduction Demo - part 2

Preparation before the demo

The attached Text backup from June 2025 is based on UK Sample data; which the following adjustments made:

1. Make sure you have a 2nd log in with different access rights - you can use Leila Dinnerplate, LD. Give her a new password (Sample88) you can log in with, in SY>>Registers>>Persons>>Browse window Operations menu "Change password".

2. Reporting Periods (old) setting should include all years from 2018 - current.

3. Sort needed registers by Date, so latest date is furthest up in the browse window.

4. Create a quote - which you will later duplicate - with serial numbered items in the matrix, eg item 30104. Make sure you have enough stock to go through a sales + delivery process (if needed create a Good Receipt, generating Ser.Nrs.)

5. Test what types of activity alarms work. Pop up messages as asked for in the script, sometimes do not work, you can use Email instead to demonstrate.

6. Activate the Item Status bar.

Benefits

Efficient Sales Quotation Management: Create new or duplicate existing quotations quickly, saving time for repeat customers. Capture follow-up dates and salesperson details directly in the quotation.

Automated Task and Reminder Features: Use the Workflow Manager to set reminders and follow-up tasks. Alarms and notifications (via pop-up, email, or message) ensure timely action on sales activities.

Multi-Access, Multi-Window Flexibility: Adaptable access rights enable role-specific system views. Seamless navigation without the need to log in or out or close windows.

Real-Time Inventory Visibility: Instantly review inventory availability and status from within documents.

In-Depth Item and Cost Tracking: Track costs using multiple methods including weighted average, last purchase, or queued costs. Maintain cost and price data in both base and operating currencies. Support for Serialised and Batch Items

Integrated Document and Email Management: Generate orders, delivery slips, and invoices directly from quotations. Email final documents to customers within the system, supporting efficient communication.

Flexible Sales and Inventory Configuration: Customisable units of measure, barcode storage, recipe management, and more. Location-specific pricing and inventory tracking improve control across branches.

Script

Introduction

Welcome to the second part of our Standard ERP presentations. In the first video, we saw how easy it is to navigate the system and, with the help of the Personal Desktop, Document Manager, built in Email and Reports, how easy it is to have a real-time overview of your business.

Now, let's look at the sales cycle, starting with a quotation.

First, I'll log back in as sales person LD.

Notice that my access rights have changed, and I now only have access to what I need to do my work.

ACTION: Logout and log back in as LD using the key button in the NC.

Switch module>>Quotations>>quotations>>click on an existing quote.

On the quotation show the information captured there including salesperson information
and follow up date

You can see that the system allows you to capture follow-up dates, sales person delivery dates, and other relevant information.

Now, let's create a new quotation.

We can do this in two ways; create new, - or simply duplicate an existing quotation that we've already created in the system, - and simply edit the duplicated details to save time if this is a customer who regularly purchases the same items.

ACTION: Duplicate an existing quotation, give it a Follow up date which isn't today (!), and save.

You can choose to follow up a on a quote on a particular date, and create a reminder for this using the Workflow Manager feature.

ACTION: Click on the heart-beat icon and on [+] to create a new task.

Let's fill in some information on the task. You can see the system automatically pulled the follow-up date, as well as type 'Quote'.

Now we can add a time and copy someone else in the office to ensure there is continuity, in case something comes up on that date. I am also able to let the supervisor know that I am working on sales.

Being an important sale, I can set an alarm for ten minutes prior to the event as a reminder.

ACTION: Add CC LD and remember. Set task type as Calendar select Time on Calendar option
        so that you can show it as time booked.
        Go to Alarm TAB select type as message and set it to 10mins before (units).
        Go to Calendar and select the follow up date and show them the time booked and
        colour. Click to show that you can go to the task from the calendar screen as well.

You can see from this that we can access the same information in many different ways following the workflow of the person and without having to close and open windows or log in and out.

Now let's suppose the follow-up date has arrived.

We can see how easy it is, from this pop-up reminder, to go directly to the task and read the details. We can send reminders or alarms via messages, text, and email - tools keeping us on top of all our tasks.

The follow-up date has arrived and the customer accepts the quote! Great news landing a good deal.

I can now create the order, delivery, and invoice directly from the quote as I have confirmed prices are still valid, and we have plenty of inventory on hand.

Standard ERP allows you to review inventory availability as you process documents.

The item status bar can be set to pop up every time you open a sales or purchase document. It can also be placed anywhere that is comfortable for the user to accommodate different working styles.

Select where on the screen you would like to see different windows when you open them, and in what order you would like information sorted within a browse window.

Let's take a look at what information is available from the item status bar.

We can, at a glance, get an idea of our inventory at this location and, if I select the blue button above quantity, I will see inventory at all locations. I can see which other orders are open for this inventory, and if there are any purchase orders for this item.

I can look at shippable vs inventory on hand, and, if I have access, gross profit. - The item bar is customizable and easy to set up.

From the Quotation or in fact from any of the documents I can simply go to a line item and drill down to the actual item card.

ACTION: Go to an item and press reverse paste special (CMd-Shift-V on Mac or F2 on Windows) to open the item card

Depending on my access rights, I can go straight to the item card from the quotation to check the setup.

Let's take a quick look at the Costs card.

Here, I can see when the price was last updated. There is also a field for …

ACTION: Go to the Stock tile on the card and point at: minimum and maximum levels

…minimum and maximum levels, - and the system can handle serial number and batch number tracking as well.

We can attach a picture of the item, - have a second unit of measure, box and singles, for example, - and make use of multiple methods of costing.

ACTION: Go to the Cost tile on the card

Standard ERP can track costs in many different ways - such as per item, item group, - or the entire inventory. You can choose to have weighted average, queued costs, last purchase cost, and last purchase cost plus extra costs such as freight, duty, and more.

You can also hold the cost in the operating currency as well as base currency for those of you with multiple locations in different countries. Standard ERP also tells you in which currency the last item was purchased.

You can also store barcodes, create recipes for manufacturing, review dates the cost price changed, and more.

Standard ERP is very flexible and can be set up for many different needs.

Costs and sell prices can be held per location by weighted average, - even when using serialised or batch items.

Let's go back to our quotation and create the Order.

From here, we see that it simply copies all of the information across and, if we are happy that nothing has changed, we can save, "OK", - and the sales order is created. From this document, we can create both a delivery slip and an invoice.

ACTION: Note that on the delivery it asks for a serial number for the item.

You will notice that I cannot complete the delivery without specifying the serial number for the item, - which is a serialised item.

This ensures the picker pulls the correct item from inventory and serves as a check for the delivery guys to ensure they have the correct product.

Now that we have completed the invoice, we can email it to the customer and call to collect our money.

ACTION: Print final document to screen and email this to customer – demonstrating the email functionality within the system as well. Show the email.

With this comprehensive functionality, you have all the necessary information right at your fingertips.

ACTION: Close all screens and go back to the Navigation centre again demonstrating the multi window environment

We've only managed to cover a small portion of Standard ERP's powerful capabilities -

But now, you can see how easy it is to create quotations, manage follow-ups and reminders, as well as track inventory levels without having to leave the quotation - how easy it is to manage your sales pipeline using Standard ERP.

Standard ERP's multi-tasking features help you stay on top of your business in every situation!