

## Business

- In order for us to enter any data for a **Company**, we need to set up a new **Business Entity**.
- The Company name should be unique, that means you cannot create two companies with exactly the same name.
- Take note **Red Highlights** are **Mandatory Field** you need to fill-in.
  1. For this module it is mandatory to choose the **Base Currency** -this is going to be your default currency for your future transactions.
  2. **Country** where the business is operating.
- Click **Restrict self-customization** to restrict specific user for customizing the system.

### Sample page for Business ID

Home System Administration Business Id: 813 cecille.abapo@dreamapps.com DreamApps PH

**The Business** Modules Models

**New Business** Copy

If you are creating a new business, change the Short Name and the Organization, and then click on New Business. Log Out and then Log In to the new business.

Short Name: DreamApps PH URL Prefix: [URL Prefix](#) Tax Number: [ ] Organization: DreamApps PH

Phone: +632.5043608 Fax: [ ] URL: www.dreamapps.com

Address 1: 27th Floor, BPI Buendia Address 2: 372 Gil Puyat Ave Contact Name: DreamApps PH

City: Makati City Email: demo@dreamapps.com State/Province: Metro Manila

Zip/Postal Code: 1209 Title Image URL: docs/x000813/ph-logo.png Country: Philippines

Background Image URL: [ ] Date Format: Day-Month-Year Date Separator: /

Command: Clear Text Capitalization: None Base Currency: PHP

Custom Features: [ ] Single Currency Only? ☐ Single Currency?

Business Regn Number: BN-9000-100 Activate Error Logging? ☐ Yes Activate Transaction Logging? ☐ Yes

Activate SMS? ☐ Yes Activate Email? ☐ Yes Activate Activity Logging? ☐ Yes

Activate History Logging? ☐ Yes Active ☒ Activate? Self-customization ☐ Restrict

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## Modules

- This is the module listing of the business.
- Checked Boxes: This are the modules that will appear in the system homepage.

### Sample page for the list of modules

<input checked="" type="checkbox"/> System Administration	<input type="checkbox"/> Portal Administration You need to provide selective role-based online access to your Customers, Dealers, Franchisee, Suppliers, Auditors, Employees, Associates, etc.
<input checked="" type="checkbox"/> Cross Application This is a mandatory module that provides the general infrastructure for all other modules. It covers general setup, system security, maintenance of essential master data for customers, suppliers and products.	<input type="checkbox"/> Messaging This is a module that provides the general infrastructure for messaging. It facilitates creation and management of messages and addresses' responses to the same.
<input checked="" type="checkbox"/> General Ledger You want to ensure that all your transactions from various modules to be reflected in your accounts. You want to maintain the books and generate financial statements.	<input type="checkbox"/> Cash Management You need to manage your cash by planning for receipts and payments and monitoring activities that have an impact on cash flow.
<input checked="" type="checkbox"/> Sub Ledgers You need to keep track of your receivables and payables on an item by item basis. You also need to know what items were cleared by payment, receipts or adjustments. May be you also want to keep separate ledgers for your discounted bills, post-dated cheques, etc.	<input checked="" type="checkbox"/> Order Processing You need to process and fulfil customer orders, take care of back orders and bill the customers for services rendered or products supplied.
<input checked="" type="checkbox"/> Purchase Order & Receiving You need to convert requisitions from sales, factory or other departments into purchase orders on your suppliers, monitor deliveries, inspect and record goods receipts and alert beneficiaries informed of the status of your purchase orders.	<input checked="" type="checkbox"/> Inventory Management You want to keep track of your inventory by unit as well as by cost. You are keen to monitor your supply commitments and take action to meet those commitments.
<input type="checkbox"/> Service Order You charge customers for the services you perform for them. Typically, you will charge by hours or by a pre-fixed amount. You will also want to be re-imbursed for disbursements.	<input type="checkbox"/> Engineering Sales You need to quote for engineering projects based on rough cut BOMs or experience, estimate costs and profits, monitor status of quotations, revise quotations, convert quotations into orders, track progress payment schedules based on project milestones, process and fulfil customer orders, take care of back orders and bill the customers for services rendered or products supplied.
<input checked="" type="checkbox"/> Space Reservation You need to rent space like rooms, billboards, hospital beds, equipment and integrate all the back end activities resulting from the same.	<input type="checkbox"/> Bill of Materials You need to maintain the component structure of your assembled products. You may also group your products into generic sub-assemblies, which in turn may be combined into finished products. You may also want to maintain the variations caused by options selected by your customers.
<input type="checkbox"/> Manufacturing Order You need to convert orders for manufactured goods from sales or other departments into manufacturing orders on your plants, issue raw materials and components, inspect and record goods receipts and alert beneficiaries informed of the status of your production.	<input checked="" type="checkbox"/> Customer Support You need to keep track of your support commitments to your customers. You also need to record customer feedbacks and complaints, and refer them to appropriate persons in your support group. You also need to handle warranty commitments like replacements and free on-site maintenance.
<input type="checkbox"/> Bug Tracking You need to keep track and manage bugs discovered by users in your products and refer them to the appropriate team of developers. This module allows you to pro-actively handle all reported problems in your products.	<input type="checkbox"/> Web Store-B2C You want to publish your products and services on the Web and allow your customers to buy and pay for them.
<input type="checkbox"/> Configurator You want to allow your customers and employees to configure end products based on predefined rules and integrate the same to your sales and fulfillment process.	<input type="checkbox"/> Exchange You want to create markets for various categories of products and services. You would like to create unique forms with ad hoc fields and rules for each category for your members to interact meaningfully. You also want to have the ability to bill sellers and/or buyers based on pre-defined business models.
<input type="checkbox"/> E-Procurement You want to publish your requisitions for products and services on the Web and allow your suppliers to quote for, receive orders and manage deliveries.	<input type="checkbox"/> Navigator You need to integrate your static and dynamic contents in your web site and provide a consistent look and feel across diverse pages. You would also like to selectively publish different contents for different audiences.
<input type="checkbox"/> Salesforce Automation You want to combine a robust sales database with the knowledge of intricate relationships between organizations, people, events and activities in order to exploit market opportunities.	<input checked="" type="checkbox"/> Event Management You want to manage events like seminars, exhibitions, workshops, classes and allow registration to the events by internal agents or external participants.
<input type="checkbox"/> Master Scheduling You need to manage planned manufacturing schedules for manufactured items based on expected sales and not based on actual orders received. The information in this module is used by Materials Requirement Planning as well as Production Scheduling and Capacity Planning modules.	<input type="checkbox"/> Materials Requirement Planning You need to ascertain your needs for raw materials and components based on your manufacturing orders or planned production derived from your master manufacturing schedules. You also need to create planned requisitions, purchase orders and manufacturing orders well in advance to fulfill these requirements.
<input type="checkbox"/> Work Center and Routing You need to maintain up to date information about your production infrastructure and estimated costs as well standard production routes for your manufactured items.	<input type="checkbox"/> Academic Management You want to combine a robust student database with the knowledge of intricate relationships between parents, teachers, events and activities in order to offer the very best.
<input type="checkbox"/> Capacity Planning You need to assess your production capacities vis-a-vis your production plans to identify bottlenecks and excess capacities, so that corrective actions may be taken to correct imbalances in your production infrastructure.	<input type="checkbox"/> Production Scheduling You need to manage planned production of items so that resources are optimally allocated based on machine capacities and production routing. You also need to keep track of status of jobs, costs incurred, and work center loading.
<input checked="" type="checkbox"/> Sales Analysis You need to analyze your sales, costs and margins by various parameters related to your products, customers, markets, territories, etc.	<input checked="" type="checkbox"/> Trip Routing You want to optimize your physical deliveries, track schedules and collect cash on delivery. You would also like to bill customers as well as your principals and manage costs and payables to your service providers.
<input type="checkbox"/> Healthcare You want to manage your healthcare practice, patient records, charges, payments, insurance and collections. You also need to manage physicians' appointments with your patient, including self internet support site that could be accessed by your patients and providers.	<input type="checkbox"/> Vessel Performance Vessel Performance Monitoring System.
<input type="checkbox"/> Crew Management Complete History & personal information of Ship Crew.	<input checked="" type="checkbox"/> Warehousing You want to receive, store, ship, manage and track your and your customers' materials in bulk or loose state in your warehouses. You need to implement appropriate picking and cartonization strategies for fulfilling shipping orders. You also need to bill your customers for the warehousing services you provide
<input type="checkbox"/> Warranty/Maintenance You need to negotiate support contracts with your customers, including free warranty and paid maintenance contracts. You also need to generate job requisitions based on your commitments and customers needs, assign appropriate resources, allocate spares and consumables, and monitor Fulfillment. You also need to bill the customers where your services and materials exceed commitments.	<input type="checkbox"/> Generic Self Service Portal You need to provide selective role-based online access to your Customers, Suppliers, Auditors, Employees, Associates, etc.
<input type="checkbox"/> E-Permits You need to process online applications for permits and allow access by vendors and buyers to the permit databases restricted to their respective segments.	<input checked="" type="checkbox"/> Human Resources You want to manage information relating to your human resources, your managers, employees, contractors and temp workers. You will also want to track their costs, revenue, attendance, training and placement.
<input checked="" type="checkbox"/> Attendance Recording You want to record attendance of employees, contractors, maintenance, security personnel, etc. The information recorded could be used for calculation of wages, billing, costing and analysis.	<input checked="" type="checkbox"/> Leave Management This is useful for maintaining leave records of employees and managing entitlements, etc.

<input type="checkbox"/>	Employee Expense Reporting You want your employees obtain approvals for expenses and report actual expenses against such approvals, preferably through the employee portal.	<input checked="" type="checkbox"/>	Payroll
<input type="checkbox"/>	Employee Appraisal	<input type="checkbox"/>	Incentives Management
<input type="checkbox"/>	Time Sheets	<input type="checkbox"/>	Recruitment
<input checked="" type="checkbox"/>	E-Employee: Self Service Portal You need to provide selective role-based online access to your employees, so that they can self-serve for routine enquiries and applications.	<input type="checkbox"/>	Land Bank
<input checked="" type="checkbox"/>	Product Data Management You want to organize and store your product data in a multi-dimensional structure and categorize them in ways that are typical as well as topical.	<input type="checkbox"/>	Ad Booking You need to keep details of publications and editions for which you'd want to accept advertisements from individuals, agencies and organizations. You'll also need to maintain a pricing engine for pricing of advertisements on retail as well as bulk basis
<input type="checkbox"/>	Classified Marketplace A portal for booking and creating classified lineage, lineage with decorations and classified display advertisements	<input type="checkbox"/>	Media Planner You need to design and manage media plans for your marketing campaigns and events
<input type="checkbox"/>	Trade Portal You need to give role-based access to different groups of people for using the Ad Booking System	<input type="checkbox"/>	*****
<input type="checkbox"/>	Student Management Module	<input type="checkbox"/>	Application Service You need to publish web-based software applications to customers on the Internet, charge them for usage, manage accounts and collect payments.
<input type="checkbox"/>	Fulfillment You need to process and fulfill customer orders, schedule deliveries, manage finishing, picking, packing and shipment of goods.	<input checked="" type="checkbox"/>	Project Management & Collaboration Collaborate with your colleagues, partners, customers, suppliers and associates. Manage and monitor projects, tasks and milestones.
<input checked="" type="checkbox"/>	Digital Asset Management An enterprise content management module that tracks, organizes, maintains and exposes all the digital assets of the organization, including those uploaded by customers, partners and other users.	<input type="checkbox"/>	Billboard You need to publish Ads, Notices, Messages, etc to your site and manage access, visibility and distribution of these based on policies, usage and profiles.
<input type="checkbox"/>	WorkSpace This is an integrated portal for employees and associates to interact and collaborate on projects, ideas, opinions, activities, events, assets, learning, sourcing, supporting and community building. The goals are to provide an environment for learning, exchanging and sharing knowledge, ideas and information across borders and entities, and thereby building a highly engaged and networked workforce that retains, leverages and enhances the organization knowledge pool while fostering individual excellence.	<input type="checkbox"/>	Blogs You need to Create, Edit, Manage and Publish blogs and receive comments.
<input type="checkbox"/>	Knowledge Base You need to Manage your organization's Knowledge Base.	<input type="checkbox"/>	Community Management You want to manage communities with common interests.
<input type="checkbox"/>	Survey Administration You need to conduct on-line surveys, collect information, test job candidates, etc.	<input type="checkbox"/>	Container Yard Management Manage container storage and handling.
<input type="checkbox"/>	Hotel Management Your Hotel Management Wizard.	<input type="checkbox"/>	LPG Depot Management Manage LPG sales, delivery, storage and handling.
<input checked="" type="checkbox"/>	Point Of Sale You need to manage retail sales in a heavy traffic environment using industry standard terminals and yet keep the base system up to date on these transaction	<input type="checkbox"/>	Oil & Gas Exploration Manage Oil & Gas Exploration.
<input type="checkbox"/>	Production Planning & Control You need to create Master Production Schedules based pre-defined Production Periods, generate Materials Utilization Requirements, Daily Instruction Schedules and Picking List for issue to shop floor.	<input type="checkbox"/>	Multi-level Marketing Multi-level Marketing
<input type="checkbox"/>	Transportation Management Manage Transportation related 3rd Party Logistics Operations.	<input type="checkbox"/>	Sales Commissions
<input checked="" type="checkbox"/>	Property Management	<input type="checkbox"/>	Container Management Manage Containers
<input type="checkbox"/>	Freight Imports Manage Freight Imports and related 3rd Party Logistics Operations.	<input type="checkbox"/>	Freight Exports Manage Freight Exports and related 3rd Party Logistics Operations.
<input type="checkbox"/>	Customs Brokerage Manage Customs Brokerage related 3rd Party Logistics Operations.	<input type="checkbox"/>	Freight Domestic Manage Domestic Freight Forwarding and related 3rd Party Logistics Operations.
<input type="checkbox"/>	Commodity Trading - Master This is a mandatory module that provides the general infrastructure for all other modules. It covers general setup, system security, maintenance of essential master data for customers, suppliers and products.	<input type="checkbox"/>	Commodity Trading - Contracts Manage Sales, Purchase and Draft Contracts.
<input type="checkbox"/>	You need to create Master Production Schedules based pre-defined Production Periods, generate Materials Utilization Requirements, Daily Instruction Schedules and Picking List for issue to shop floor.	<input type="checkbox"/>	Multi-level Marketing Multi-level Marketing
<input type="checkbox"/>	Transportation Management Manage Transportation related 3rd Party Logistics Operations.	<input type="checkbox"/>	Sales Commissions
<input checked="" type="checkbox"/>	Property Management	<input type="checkbox"/>	Container Management Manage Containers
<input type="checkbox"/>	Freight Imports Manage Freight Imports and related 3rd Party Logistics Operations.	<input type="checkbox"/>	Freight Exports Manage Freight Exports and related 3rd Party Logistics Operations.
<input type="checkbox"/>	Customs Brokerage Manage Customs Brokerage related 3rd Party Logistics Operations.	<input type="checkbox"/>	Freight Domestic Manage Domestic Freight Forwarding and related 3rd Party Logistics Operations.
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<input type="checkbox"/>	Land Bank	<input type="checkbox"/>	Project Development
<input type="checkbox"/>	Building Information Modelling Manage digital representations of physical and functional characteristics of places, buildings, projects, etc.	<input type="checkbox"/>	Bill of Quantities Generate, Manage, Use and Maintain BOQs
<input type="checkbox"/>	Equipment Rental	<input type="checkbox"/>	Work Orders You need to create and process work orders resulting from planned requirements, customer orders and internal consumptions. You will requisition and draw raw materials, consumables and components from inventory and return excesses, by-products and finished goods to stores for delivery or consumption.
<input type="checkbox"/>	Fixed Assets You need to manage your fixed assets, account for their wear and tear, procurement, disposals and replacements.		

## Sample page for models

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