Business

- In order for us to enter any data for a **Company**, we need to set up a new **Business Entity**.
- Company information will be inputted.
- 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

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

	Left Module		Right Module
☑	**System Administration**	☐	**Portal Administration** You need to provide selective role-based online access to your Customers, Dealers, Franchisee,Suppliers, Auditors, Employees, Associates, etc.
☑	**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.	☐	**Messaging** This is a module that provides the general infrastructure for messaging. It facilitates creation and management of messages and adresses' responses to the same.
☑	**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.	☐	**Cash Management** You need to manage your cash by planning for receipts and payments and monitoring activities that have on impact on cash flow.
☑	**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.	☑	**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.
☑	**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.	☑	**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.
☐	**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.	☐	**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.
☑	**Space Reservation** You want to rent space ilike rooms, billboards, hospital beds, equipment and integrate all the back end activities resulting from the same.	☐	**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.
☐	**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.	☑	**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 ilike replacements and free on-site maintenance.
☐	**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.	☐	**Web Store-B2C** You want to publish your products and services on the Web and allow your customers to buy and pay for them.
☐	**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.	☐	**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.
☐	**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.	☐	**Navigator** You need to integrate you 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.
☐	**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.	☑	**Event Management** You want to manage events ilike seminars, exhibitions, workshops, classes and allow registration to the events by internal agents or external participants.
☐	**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.	☐	**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 requistions, purchase orders and manufacturing orders well in advance to fulfill these requirements.
☐	**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.	☐	**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.
☐	**Capacity Planning** You need to asses 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 you production infrastructure.	☐	**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.
☑	**Sales Analysis** You need to analyze your sales, costs and margins by various parameters related to your products, customers, markets, territories, etc.	☑	**Trip Routing** You want to optimize your physical deliveries, track schedules and collect cash on delivery. You would also ilike bill customers as well as your principals and manage costs and payables to your service providers.
☐	**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.	☐	**Vessel Performance** Vessel Performance Monitoring System.
☐	**Crew Management** Complete History & personal information of Ship Crew.	☑	**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
☐	**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.	☐	**Generic Self Service Portal** You need to provide selective role-based online access to your Customers, Suppliers, Auditors, Employees, Associates, etc.
☐	**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.	☑	**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.
☑	**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.	☑	**Leave Management** This is useful for maintaining leave records of employees and managing entitilements, etc.

	Left Column		Right Column
☐	**Employee Expense Reporting** — You want your employees obtain approvals for expenses and report actual expenses against such approvals, preferably through the employee portal.	☑	**Payroll**
☐	**Employee Appraisal**	☐	**Incentives Management**
☐	**Time Sheets**	☐	**Recruitment**
☑	**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.	☐	**Land Bank**
☑	**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.	☐	**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
☐	**Classified Marketplace** — A portal for booking and creating classified lineage, lineage with decorations and classified display advertisements	☐	**Media Planner** — You need to design and manage media plans for your marketing campaigns and events
☐	**Trade Portal** — You need to give role-based access to different groups of people for using the Ad Booking System	☐	********
☐	**Student Management Module**	☐	**Application Service** — You need to publish web-based software applications to customers on the Internet, charge them for usage, manage accounts and collect payments.
☐	**Fulfillment** — You need to process and fulfill customer orders, sechedule deliveries, manage finishing, picking, packing and shipment of goods.	☑	**Project Management & Collaboration** — Collaborate with your coleagues, partners, customers, suppliers and associates. Manage and monitor projects, tasks and milestones.
☑	**Digital Asset Management** — An enterprise content management module that tracks, organizes, maintains an exposes all the digital assets of the organization, including those uploaded by customers, partners and other users.	☐	**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.
☐	**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, exchaging and sharing knowledge, ideas and information accross 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.	☐	**Blogs** — You need to Create, Edit, Manage and Publish blogs and receive comments.
☐	**Knowledge Base** — You need to Manage your organization's Knowledge Base.	☐	**Community Management** — You want to manage communities with common interests.
☐	**Survey Administration** — You need to conduct on-line surveys, collect information, test job candidates, etc.	☐	**Container Yard Management** — Manage container storage and handling.
☐	**Hotel Management** — Your Hotel Management Wizard.	☐	**LPG Depot Management** — Manage LPG sales, delivery, storage and handling.
☑	**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	☐	**Oil & Gas Exploration** — Manage Oil & Gas Exploration.
☐	**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.	☐	**Multi-level Marketing** — Multi-level Marketing
☐	**Transportation Management** — Manage Transportation related 3rd Party Logistics Operations.	☐	**Sales Commissions**
☑	**Property Management**	☐	**Container Management** — Manage Containers
☐	**Freight Imports** — Manage Freight Imports and related 3rd Party Logistics Operations.	☐	**Freight Exports** — Manage Freight Exports and related 3rd Party Logistics Operations.
☐	**Customs Brokerage** — Manage Customs Brokerage related 3rd Party Logistics Operations.	☐	**Freight Domestic** — Manage Domestic Freight Forwarding and related 3rd Party Logistics Operations.
☐	**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.	☐	**Commodity Trading - Contracts** — Manage Sales, Purchase and Draft Contracts.
☐	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.	☐	**Multi-level Marketing** — Multi-level Marketing
☐	**Transportation Management** — Manage Transportation related 3rd Party Logistics Operations.	☐	**Sales Commissions**
☑	**Property Management**	☐	**Container Management** — Manage Containers
☐	**Freight Imports** — Manage Freight Imports and related 3rd Party Logistics Operations.	☐	**Freight Exports** — Manage Freight Exports and related 3rd Party Logistics Operations.
☐	**Customs Brokerage** — Manage Customs Brokerage related 3rd Party Logistics Operations.	☐	**Freight Domestic** — Manage Domestic Freight Forwarding and related 3rd Party Logistics Operations.
☐	**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.	☐	**Commodity Trading - Contracts** — Manage Sales, Purchase and Draft Contracts.
☐	**Land Bank**	☐	**Project Development**
☐	**Building Information Modelling** — Manage digital representations of physical and functional characteristics of places, buildings, projects, etc.	☐	**Bill of Quantities** — Generate, Manage, Use and Maintain BOQs
☐	**Equipment Rental**	☐	**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.
☐	**Fixed Assets** — You need to manage your fixed assets, account for their wear and tear, procurement, disposals and replacements.		

Models

Sample page for models