WHAT IS ERP & HOW WE WORKS?

The multi-module application software supports various activities that assist a company in effectively managing its core business operations in an integrated manner.

Key features include:

- Seamless information flow across organizational boundaries, ensuring efficient communication and collaboration

- A standardized environment with a shared database that is independent of specific applications, promoting data integrity and accessibility

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PROBLEMS WITH NON-ERP SYSTEMS

- In-house design limits connectivity outside the company

- The tendency toward separate IS's within the firm

- Lack of integration limits communication within the company

- Strategic decision-making not supported

- Long-term maintenance costs high

- Limits ability to engage in process reengineering

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MAJOR BENEFITS OF A GOOD ERP SYSTEM

DATANOTE
OpenLogic ERP

MANAGEMENT

- Management has quick access to consolidated and meaningful information in the form of reports, charts and graphs.

- Intelligent and critical MIS reports based on which management can make significant business decisions.

- ERP software also helps dig deep into the problematic area via its drill-down tools in business reports.

- With ERP software, it is easy to continually monitor business improvement plans or corrective action plans by constantly comparing the records and latest data.

- ERP systems also help companies bring transparency in transactions, accounts and finance as the business information is available to top authorities without any barrier.

MAJOR BENEFITS OF A GOOD ERP SYSTEM

DATANOTE
OpenLogic ERP

ROOT LEVEL

- Process owners get the latest technology to work with, which eases their job and make them feel good. The feel-good factors improve key user's engagement which has many inherent benefits.

- ERP software also frees up employees from specific data entry – data collection related works, enabling them to focus on productive jobs rather than meddling with documentation.

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MODULE TREE

DATANOTE OpenLogic ERP

Child Modules → Parent Modules

CRM	R&D / Design	Project	Procurement	Production	QC	Inventory	Logistic	HRM	Maintenance	Finance	Addons
			MIS Reports					MIS Reports			IoT
			Purchase Return	MIS Reports			MIS Reports	Employee Training			Scheme Management
MIS Reports	MIS Reports		Purchase Bill Booking	WIP - Work in Progress	MIS Reports		Stock Ledger	Loan & Advance Management	MIS Reports	Bi - Business Intelligence
Sales Order & Proforma	Design Change		GRN	Third Party Job Work	COA	MIS Reports	Stock Adjustment	Leave Management	MIS Reports	Statutory Compliances	Mobile Applications
Quotation	Design Validation	MIS Reports	Gate Inward	Work Order Management	PDI QC	Material Return	Sales Return	Salary Generation	Machine Reading*	Journal Entry & Reconciliation	Whatsapp Integration
Opportunity	Design Verification	Project Cost Centers	Import	Planning & Scheduling	Online QC	Material Receipt	Commercial Invoice	Attendance	Machine Recovery	Dynamic Tax Configuration	Guest House Management
Followups & Task Management	Design Output	WBS Review	Purchase Order	Batch Order	Process Wise QC	Material Issue	Export Documents	Organization Chart	Breakdown Register	Cost Accounting	Courier Management
Lead Management	Design Control	Work Breakdown Structure	RFP / RFQ	Product Data Management	Production QC	Item Requisition	Packing List & Packing Slip	Interview Action Plan	Preventive Maintenance	Fixed Asset Management	Document Management
Company & Contacts	Design Input	Estimation	Indent Management	Manufacturing Bill of Material	Raw Material Inward QC	Warehousing	Delivery Order	Manpower Planning	Machine Check List	Payable & Receivable	Fleet Management
Sales Team & Targets	Design Planning	Feasibility Study	Supplier Management	Product Bill of Material	QC Parameter Master	Item Administration	Dispatch Advice	Manpower Requirement	Machine Master	General Accounting	E-Commerce Integrations
CRM	**R&D / Design**	**Project**	**Procurement**	**Production**	**QC**	**Inventory**	**Logistic**	**HRM**	**Maintenance**	**Finance**	**Addons**

CRM - ORGANIGRAMME

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CRM

PRE SALES

- SALES TEAM
- SALES FORECAST
- CAMPAIGN
- COMPANY
- CONTACT

MARKETING

- LEAD
- ACCOUNT MASTER
- INQUIRY / OPPORTUNITY
- PROPOSAL
- SALES ORDER
- PROFORMA INVOICE

REPORTS
- Follow Up Summary
- Lead Register
- Inquiry Register
- Proposal Register
- Sales Order Register

PRINTS
- Minutes of meeting
- Quotation / Proposal
- Order Acknowledgement
- Proforma Invoice

INTEGRATED MODULES
- CRM
- Masters
- Dashboard

ABBREVIATION
- Follow Up

CRM – CUSTOMER RELATIONSHIP MANAGEMENT

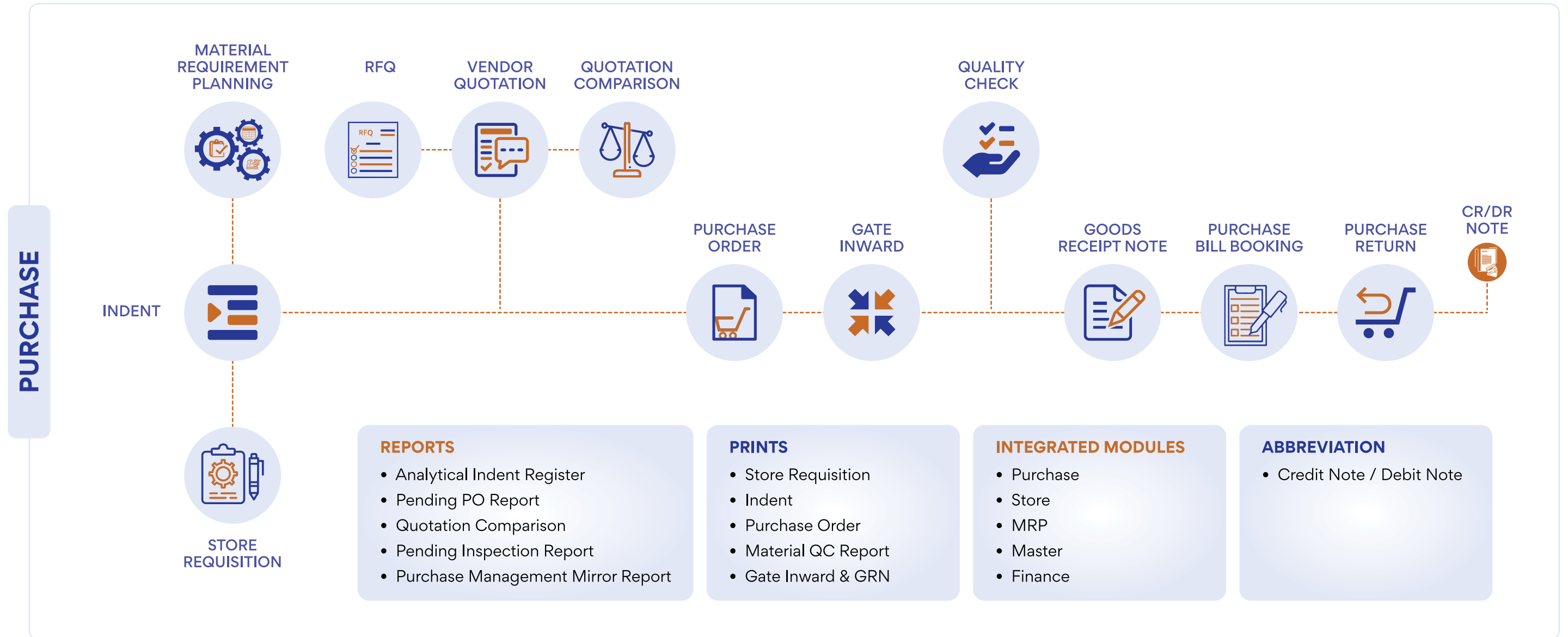| Forms	Description
Lead Management	A sales lead refers to a potential customer who may eventually make a purchase. These leads can be acquired through various marketing initiatives such as advertising, trade shows, direct mail, third-party sources, and other promotional efforts. Upon approval, the lead is directed to the ledger creation process. This system offers functionalities for follow-up actions and document attachments.
Follow-ups	Follow-up is a crucial aspect of DataNote, particularly for professionals in customer relationship management (CRM). Follow-ups can be linked to leads, opportunities, quotes, or sales orders. Additionally, organizations have the option to integrate follow-ups with their Google Calendar.
Opportunity	A sales opportunity refers to a qualified prospect or lead. It can be direct or associated with a lead. Our system enables customers to provide their requirements, attach relevant documents, terms and conditions, specifications, technical details, and any necessary documents.
Proposal	A proposal or quotation is a formal document that outlines the pricing, discounts, terms and conditions, and technical specifications of products or services being offered. It can be presented directly to a potential customer or in response to a specific opportunity.
Sales Order	This document serves as an official record of the order received from the client and is essential for generating the proforma invoice. In certain instances, it may also be utilized to secure internal sales orders, particularly in make-to-stock production scenarios.

PURCHASE - ORGANIGRAMME

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PURCHASE

- MATERIAL REQUIREMENT PLANNING
- RFQ
- VENDOR QUOTATION
- QUOTATION COMPARISON
- QUALITY CHECK
- INDENT
- PURCHASE ORDER
- GATE INWARD
- GOODS RECEIPT NOTE
- PURCHASE BILL BOOKING
- PURCHASE RETURN
- CR/DR NOTE
- STORE REQUISITION

REPORTS
- Analytical Indent Register
- Pending PO Report
- Quotation Comparison
- Pending Inspection Report
- Purchase Management Mirror Report

PRINTS
- Store Requisition
- Indent
- Purchase Order
- Material QC Report
- Gate Inward & GRN

INTEGRATED MODULES
- Purchase
- Store
- MRP
- Master
- Finance

ABBREVIATION
- Credit Note / Debit Note

PURCHASE MANAGEMENT

DATANOTE®
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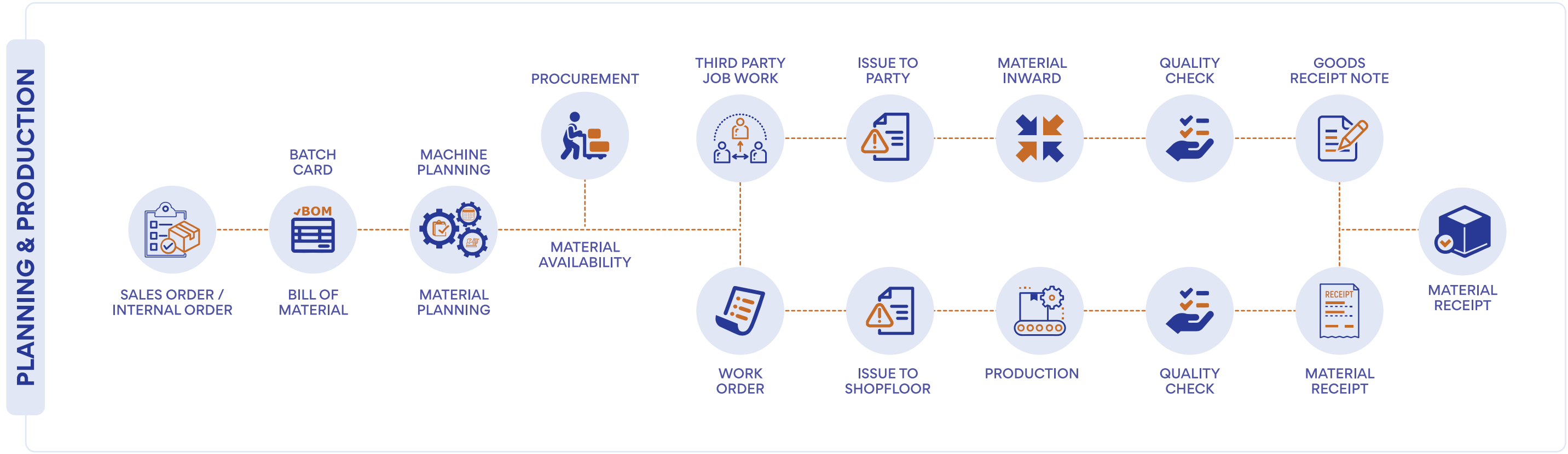| Forms	Description
Indent	An indent is an internal control document utilized in the procurement process to grant authorization for materials prior to the initiation of a purchase order. The indent can be automatically generated, based on planning, or in response to a requisition.
RFQ - Request for Quotation	A request for quotation (RFQ) is a formal business process where a buyer solicits pricing information from potential suppliers for specific goods or services. The system allows for the efficient input of pricing data from various suppliers, enabling comparative analysis and informed decision-making.
Purchase Order	This controlled document can be used directly or against an indent or the supplier's quotation (RFQ). Sometimes, it can also be used against the production order.
Inward	The Inward module is utilized at the gate to reserve the material receipt against the purchase order and supplier challenges. Subsequently, data frequently passes through the inward QC.
GRN – Goods Receipt Note	Following the arrival of inward or inward quality control materials in the goods received note (GRN) module, partial GRN becomes feasible. Additionally, the organization may occasionally connect GRN to the purchase order to streamline the process.
Purchase Bill Booking & Return	This module is designed for recording purchase invoices, either directly or against a goods received note (GRN) or purchase order. In contrast, the purchase return form is utilized to document the return of goods to a supplier, whether due to quality control rejection or excess quantity received.

PLANNING & PRODUCTION - ORGANIGRAMME

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PLANNING & PRODUCTION

SALES ORDER / INTERNAL ORDER → BILL OF MATERIAL (BATCH CARD) → MATERIAL PLANNING (MACHINE PLANNING) → MATERIAL AVAILABILITY

PROCUREMENT

THIRD PARTY JOB WORK → ISSUE TO PARTY → MATERIAL INWARD → QUALITY CHECK → GOODS RECEIPT NOTE → MATERIAL RECEIPT

WORK ORDER → ISSUE TO SHOPFLOOR → PRODUCTION → QUALITY CHECK → MATERIAL RECEIPT

REPORTS
- Production Management Mirror Report
- Batch wise production Included Yield
- Quality Rejection Analysis
- WIP Stock Status
- Auto Production Register

PRINTS
- Work Order
- Job Order
- QC Report
- Issure Slip
- Production Summary

INTEGRATED MODULES
- Sales
- MRP
- Production
- Procurement
- Finance

PLANNING & PRODUCTION MANAGEMENT

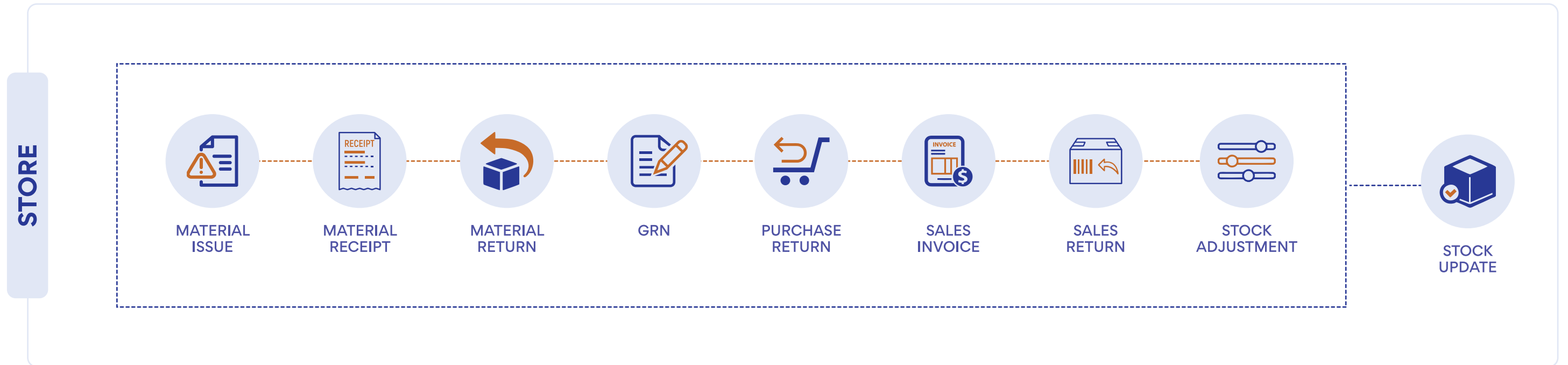| Forms	Description
Bill of Material	Bill of Materials, enables users to define both material and manufacturing BoMs. The manufacturing BoM encompasses provisions for capturing intricate details such as specifications, overheads, SOPs, byproduct information, and other process-related components including tools and consumables.
Material Requirement Planning (MRP-1)	Material Requirements Planning (MRP) is a system used to ensure that materials are available for production as per the ratios defined in the BoM. MRP-1 can be implemented manually or directly against a sales order.
Material Requirement Planning (MRP-2)	Machine requirement planning, also known as MRP-2, enables users to efficiently plan and manage their plant and machinery operations. This module provides visibility into available time slots for specific machines, allowing for optimized scheduling and resource allocation.
Conversion / Auto Production	This is a valuable tool for organizations seeking to meticulously document and maintain a comprehensive record of their production shifts or days. It falls under the category of post-production recording, a widely adopted practice in industries characterized by extended periods of line-based production.
Production Order / Work Order	The production order module is responsible for generating work orders or production orders for specific operations or processes. Data from this module can be directed to either the material issue module or the third-party job-order module.

STORE / INVENTORY - ORGANIGRAMME

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STORE

MATERIAL ISSUE → MATERIAL RECEIPT → MATERIAL RETURN → GRN → PURCHASE RETURN → SALES INVOICE → SALES RETURN → STOCK ADJUSTMENT → STOCK UPDATE

REPORTS
- GRN
- Material Issue
- Material Receipt
- Stock Journal / Adjustment
- Material Return

PRINTS
- Location wise stock
- Stock Valuation Report
- Stock Ageing
- Consolidated Stock
- FSN Moving Stock Report

INTEGRATED MODULES
- Purchase
- Store
- Finance
- Sales

STORE / INVENTORY MANAGEMENT

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OpenLogic ERP

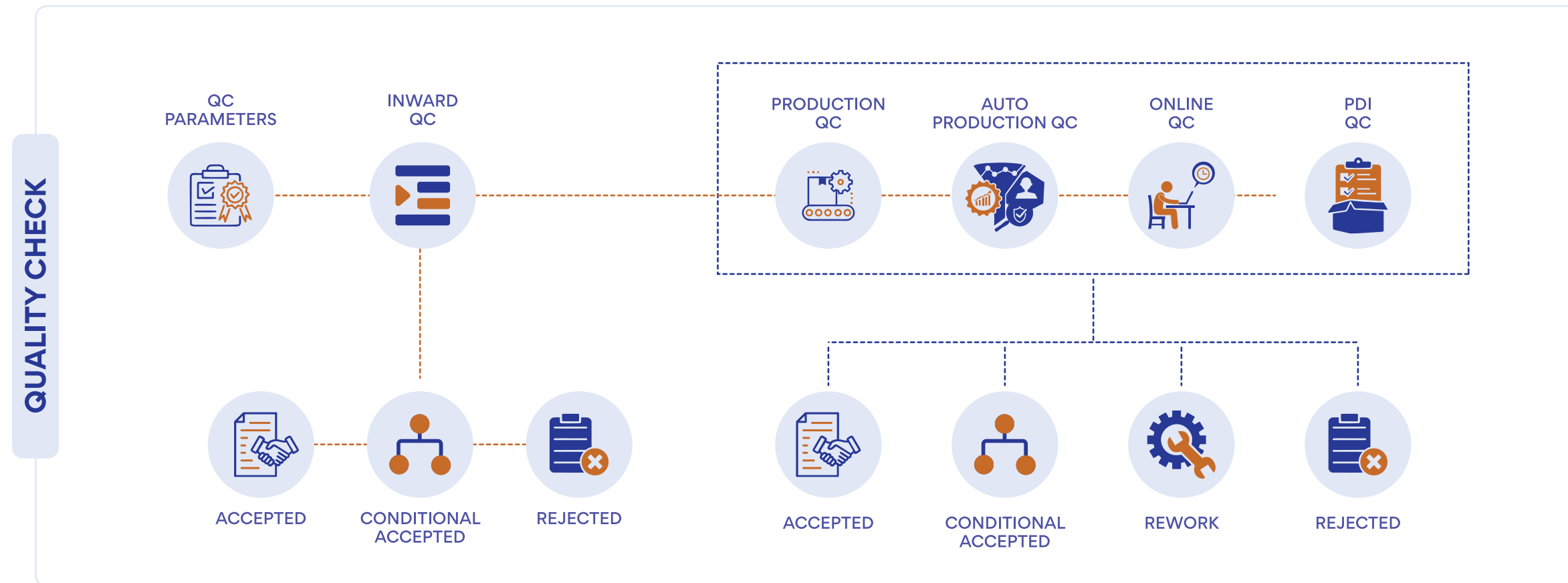| Forms	Description
Material Requisition	A Material Requisition, serves as a formal document utilized by the production department to request the necessary materials for the completion of a manufacturing process or for other designated purposes.
Material Issue	The purpose of this document is to maintain accurate records of the issuance of raw materials, tools, and semi-finished materials. These materials may be issued against a specific work order or production order, or they may be issued directly to a user.
Material Receipt	This module is designed to document the department responsible for receiving specific materials, whether they originate from production, job work, or an external source, and to book the material under either work-in-progress or finished stock.
Material Return	The Material Return module plays a critical role in effectively managing the inventory of returnable materials within the organization. This module enables the stores department to efficiently receive and process returnable items such as tools and parts that require return from the shop floor or external parties involved in job-related tasks.
Stock Adjustment	Stock adjustments are corrections made to inventory or stock records to ensure they align with the results of a physical inventory count. Additionally, the system enables modifications to the valuation of the stock.
Rate Chart	This utility is primarily employed to administer the rate of each commodity from a singular interface. This can be accomplished on a customer-specific or regional basis with a designated duration.

QUALITY CONTROL - ORGANIGRAMME

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QUALITY CHECK

QC PARAMETERS

INWARD QC

PRODUCTION QC

AUTO PRODUCTION QC

ONLINE QC

PDI QC

ACCEPTED

CONDITIONAL ACCEPTED

REJECTED

ACCEPTED

CONDITIONAL ACCEPTED

REWORK

REJECTED

REPORTS
- QC Management Mirror Report
- QC Register
- Vendor - Item wise yield report
- QC Rejection report
- Reason - Item wise rejection

PRINTS
- List of QC Parameter
- List of Rejection
- Quality Inspection - Inward material
- WIP QC Inspection Sheet
- PDI Sheet

INTEGRATED MODULES
- QC
- Purchase
- Production
- Dispatch
- Store

QUALITY CONTROL MANAGEMENT

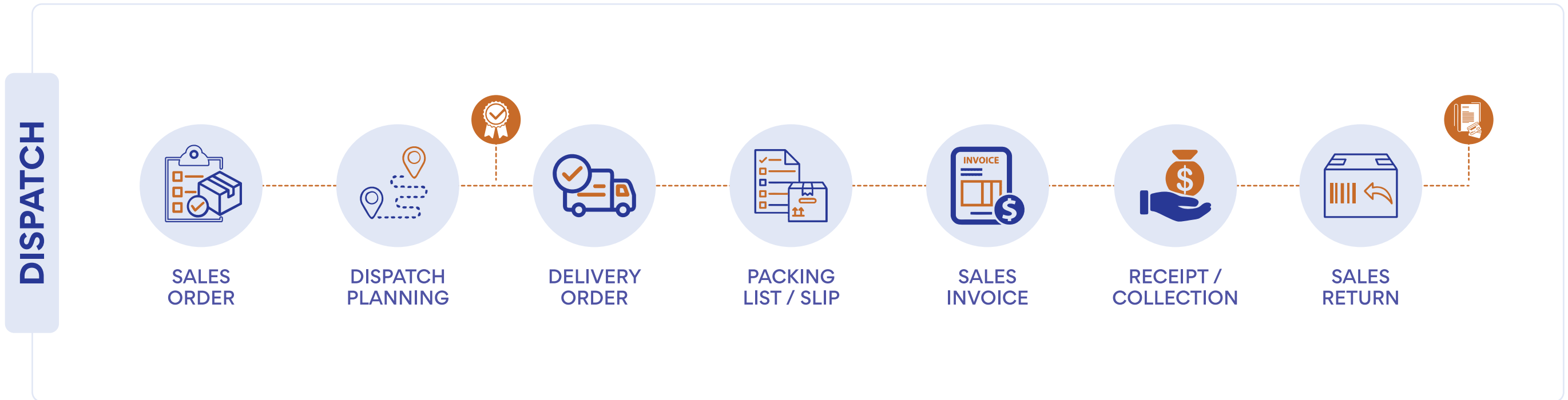| Forms	Description
Inward QC	Inbound quality control is a crucial process for ensuring the quality of incoming materials and components. It involves rigorous validation checks to verify that the supplied batch meets the specified standards and requirements.
Production QC	Quality control in production entails rigorous validation of material quality at each stage of the manufacturing process, culminating in a final assessment of the finished product.
Conversion QC	Conversion quality control is beneficial when the organization has automated production or conversion production reservations during shift changes or at the conclusion of the business day.
On-Line QC	Online Quality Control, while not consistently performed, is a crucial component of the Quality Control module. This method of quality verification is necessary when the material being produced lacks interruptions between operations or processes. After a predetermined time interval, the system can issue reminders to obtain the Quality Control results.
PDI QC	Pre-dispatch inspection, often referred to as PDI Quality Control, is a crucial practice adopted by certain companies to ensure the quality of their products before they are dispatched for sale. This process involves rigorous inspections and checks to identify any potential defects or issues with the products, thereby safeguarding customer satisfaction and upholding the company's reputation for delivering high-quality goods.

DISPATCH & LOGISTICS - ORGANIGRAMME

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DISPATCH

SALES ORDER → DISPATCH PLANNING → DELIVERY ORDER → PACKING LIST / SLIP → SALES INVOICE → RECEIPT / COLLECTION → SALES RETURN

REPORTS
- Dispatch Register
- Pending Dispatch
- Sales Register
- Invoice Register
- SO Status

PRINTS
- Delivery Order / Challan
- Commercial Invoice
- Packing Slip

INTEGRATED MODULES
- Sales
- Dispatch
- Finance

ABBREVIATION
- PDI - Pre Dispatch Inspection
- Credit Note / Debit Note

DISPATCH & LOGISTICS

DATANOTE®
OpenLogic ERP

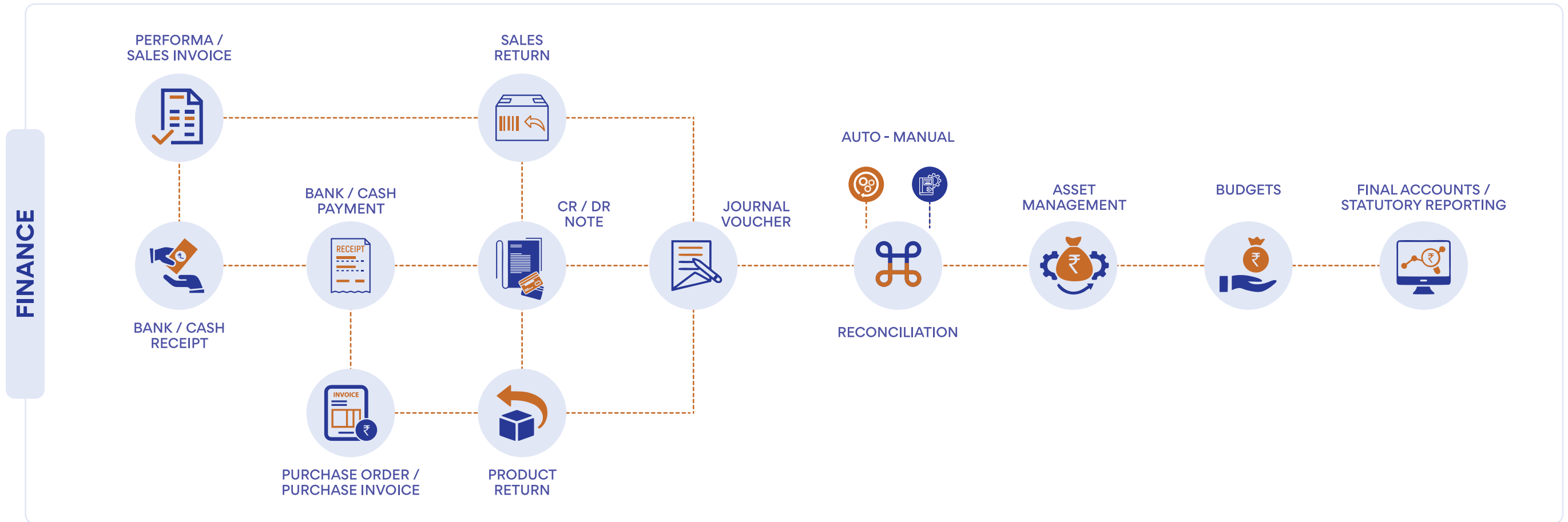| Forms	Description
Dispatch Advice / Instruction	This module places a strong emphasis on the meticulous planning of deliveries in accordance with the sales orders. Within this module, the dispatch department is empowered to strategically allocate transporters or orchestrate the entire dispatch process, guided by the established delivery priorities and meticulously crafted route plans.
Delivery Order	A Delivery Order/Challan serves as a crucial document generated during the transportation of goods in response to a sales order or dispatch advice. It meticulously details the items shipped, their respective quantities, and the designated buyer's and delivery addresses. Additionally, a delivery order encompasses the packing list, pertinent reminders, terms and conditions governing the transaction, and any relevant document attachments.
Invoice	A sales invoice, also known as a sales bill, serves as a crucial control document employed by companies to formally notify their customers of the outstanding amount due for goods or services rendered. This invoice can be generated in response to a delivery order, dispatch advice, or sales order, or it may be issued directly to the customer through WhatsApp or eMail.
Sales Return	The Sales Return module records the reversal of the costing, inventory, and taxation entries in the respective ledgers.

FINANCE - ORGANIGRAMME

FINANCE

PERFORMA / SALES INVOICE

SALES RETURN

AUTO - MANUAL

BANK / CASH PAYMENT

BANK / CASH RECEIPT

CR / DR NOTE

JOURNAL VOUCHER

ASSET MANAGEMENT

BUDGETS

FINAL ACCOUNTS / STATUTORY REPORTING

RECONCILIATION

PURCHASE ORDER / PURCHASE INVOICE

PRODUCT RETURN

REPORTS
- GSTR 1,2,3B
- Ageing Analysis
- Final Account
- Group Summery
- Bank Reco

PRINTS
- Payment Voucher
- Receipt Voucher
- Journal
- Debit Note
- Credit Note

INTEGRATED MODULES
- Finance
- Sales
- Purchase
- Store

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FINANCE MANAGEMENT

| Forms	Description
Payment	The payment process involves disbursing funds to the supplier upon receipt of a purchase invoice. In certain instances, advance payments may be made against a purchase order. Additionally, the system accommodates payments against multiple invoices. Standard deductions, such as TDS, are automatically processed by the system.
Receipt	A receipt serves as a financial document acknowledging the reception of funds from a customer. It can be booked against a sales invoice or as an advance payment for a sales order or proforma invoice.
Journal Voucher - JV	Journal Voucher serves as a formal documentation to record or post transactions in the accounting journal.
Credit & Debit Note	A Credit Note is a formal business document issued by a vendor to a client. Conversely, a Debit Note is a formal business document issued by a client to a vendor.
Reconciliation	Reconciliation is a core accounting procedure that verifies the alignment between expenditures and account balances at the conclusion of a fiscal period. The system offers both manual and automated reconciliation options through configurable settings.
Cost Centre & Budgeting	A cost centre is principally accountable for direct operational expenses and achieving production targets and quotas. In this approach, the budgeted cost is juxtaposed with the actual cost. Deviations are scrutinized, essential rectifications are implemented, and efficiencies are acknowledged.

PROJECT MANAGEMENT - ORGANIGRAMME

PROJECT MANAGEMENT

ASSET MANAGEMENT

BUDGETS

PROJECT ORDER

BOQ

ACTIVITY / TASK LIST

MATERIAL REQUISITION
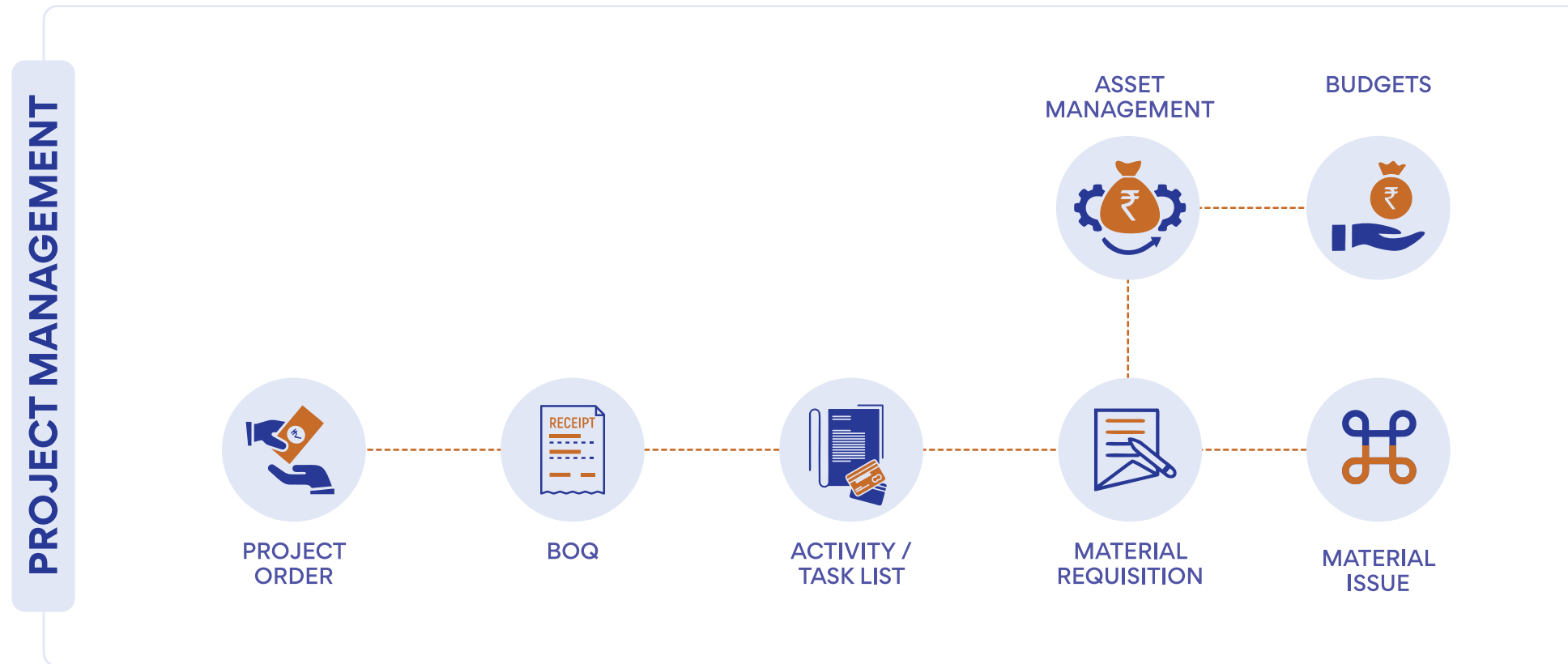
MATERIAL ISSUE

REPORTS
- Project Status Analysis
- Material Consumption Report
- Daily Activity Analysis
- Material Requisition Summary

PRINTS
- Activity Timeline
- Requisition Slip
- Material Issue Slip

INTEGRATED MODULES
- CRM
- Project Management
- Store / Inventory
- Finance

PROJECT MANAGEMENT

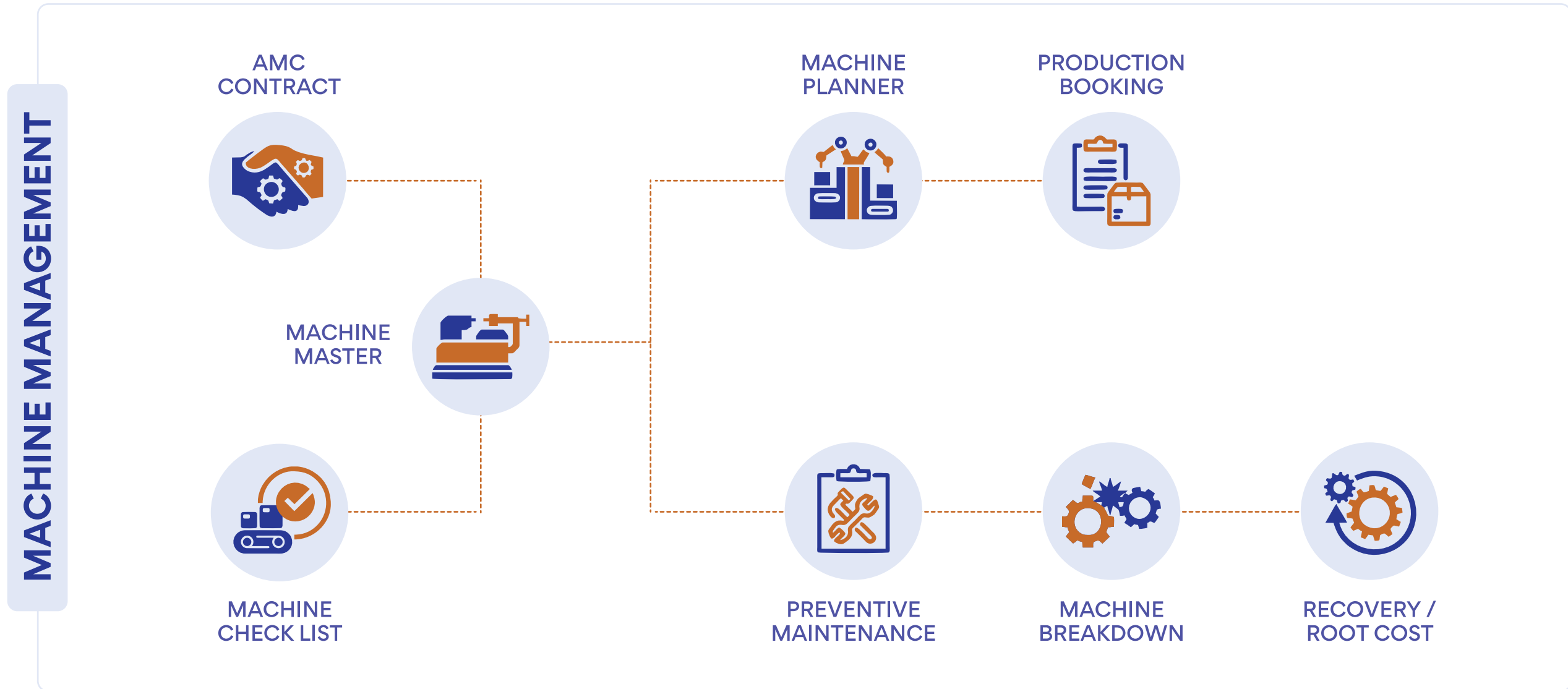| Forms	Description
Feasibility	This document serves as a technical reference, capturing intricate details in response to technical inquiries posed by clients during the initial inquiry phase. In instances where the sales team encounters challenges in addressing these queries, a feasibility assessment may be required.
Estimation	Estimation is a crucial aspect of quotation preparation as well as project planning, encompassing the quantitative assessment of project costs, resource requirements, and timeframes. It involves determining the necessary efforts and associated costs for implementing a project, either partially or in its entirety.
Work Breakdown Structure	A Work Breakdown Structure (WBS) is a project management and systems engineering tool that helps to decomposes a project into smaller, more manageable components. It serves as a key project deliverable, organizing the team's tasks into manageable sections to facilitate efficient project execution.
WBS – Review	The Work Breakdown Structure Review is a fundamental component of efficient project planning, execution, and reporting. It serves as the mandatory module for systematically capturing the progress of engineering activities on a scheduled basis.

MACHINE / PLANT MAINTENANCE

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| Forms	Description
Machine Registration	The Machine Registration module encapsulates critical data pertaining to plant and machinery, encompassing machine checklists, spare parts specifications, and pertinent documentation. Notably, this module facilitates the specification of machine checklists, thereby enabling effective management of preventive maintenance procedures.
Preventive Maintenance	Preventative maintenance is the regular, routine maintenance that keeps equipment operational, preventing unplanned downtime and costly expenses from unexpected equipment failure. This module is connected to the machine checklist defined in the Machine Registration module.
Breakdown	Here, a breakdown refers to unanticipated and abrupt physical damage to designated machinery, necessitating repair or replacement. Furthermore, this module encompasses comprehensive information pertaining to the operator, shift, and various other parties involved in the breakdown incident.
Recovery	Machine Recovery encompasses the repair and recovery-related data pertaining to the registered Breakdown. Additionally, it comprises information concerning the underlying cause, a methodical approach to maintenance troubleshooting that empowers organizations to pinpoint and manage the systemic origins of a maintenance issue. Furthermore, it incorporates the inventories utilized in the repair of the Breakdown.
Readings	This bespoke module is designed to capture machine-related readings. As a custom module, it necessitates customization based on machine configurations, API availability, and other tools.
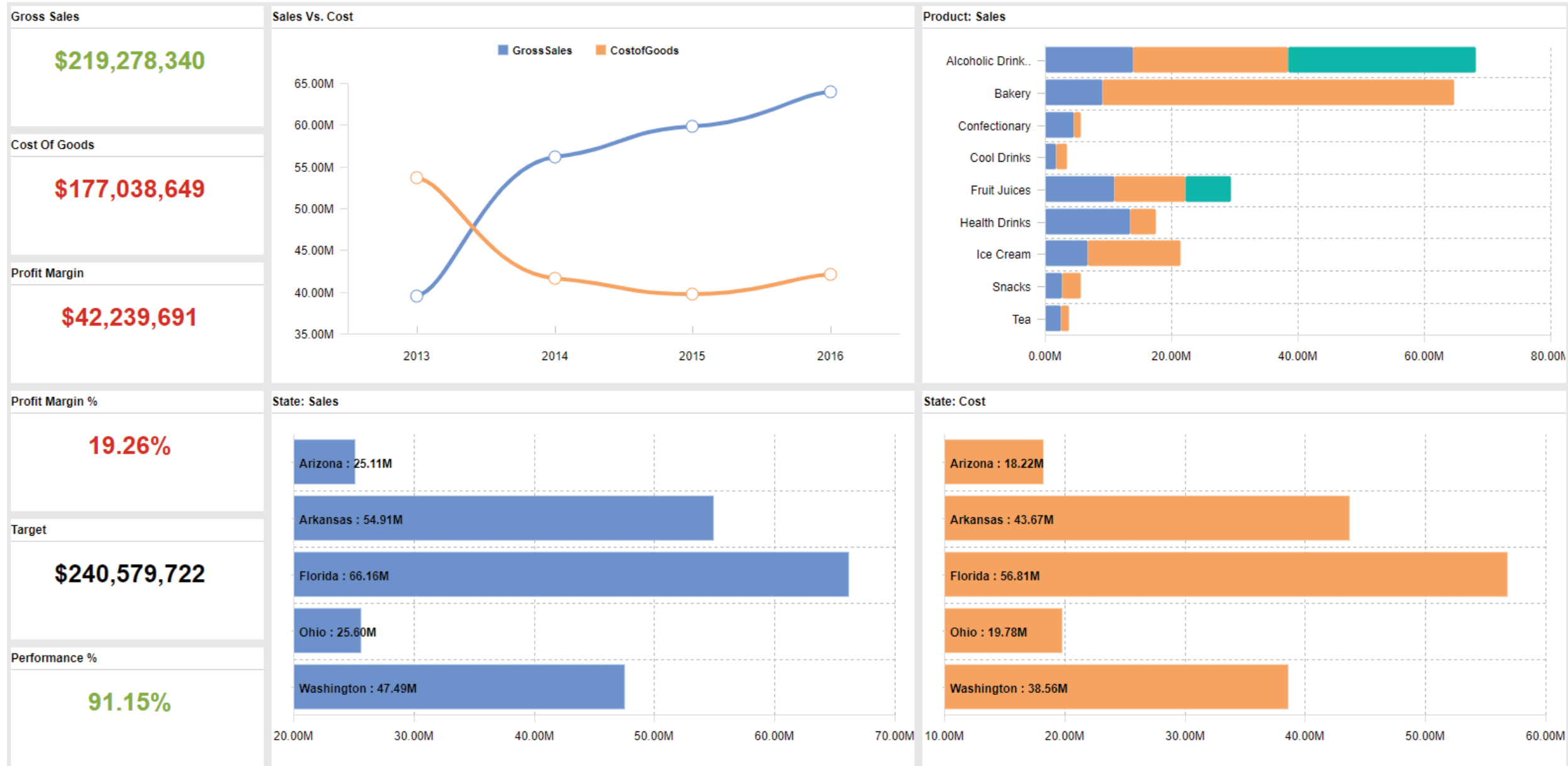
KEY FEATURES OF DATANOTE

Logical Source Code Ownership – First in Class*

Integrated DMS / File Manager to Access the Attached Documents

Wide range of integrations like WhatsApp, IndiaMart, Google Calendar, Drive, Email & many others

Cloud & On-Premise Server Model Enabled Web-based ERP

User Friendly & Institutive User Interface

Master Data Upload Facility Through Microsoft Excel

Document Attachment & Tagging Facility

Barcode, QR Code & RFID Compatible

KEY FEATURES OF DATANOTE

Multi-Language Facility that (122 Languages)*

Multi-Currency, Location, Operating System Enabled

Dynamic Multi-Attribute Search Facility

Multi-Level & Conditional User Right Management

Graphical Representation of Reports Through Dashboards & BI

Alerts Facility through WhatsApp, SMS & Email

Dynamic Tax & Charges Calculation Facility

Data Security and User Log Management

ISO & TS Required Report Generation*

VALUABLE CLIENTS

Logos of valuable clients: Gokul (Hadvani's), Kabhi B, Diamond (The World of Peanuts), Lo! Low Carb Delights, Lyons Maid, UPSCL, Tridah Wholesalers Limited, Conquest Engineering, Austin, Bradys (Quality, Our Legacy), Axel (always excels...), Allmarc, Veer Machinery, Bhagwati, Natraj Gharelu Aatachakki, Polytol Paints, Rangoli Ice Cream, Janki Group, Yash Birla Group, Heavy Metal & Tubes (India) Pvt. Ltd., LBST Lal Baba Seamless Tubes, Hindustan Inox Ltd., SKM, Suncity, Super First Forwarders, Aquatiz, Bradys, anup, Power Source, Shivalik, Topsun, N Power, Tirex, Jumbofoam, Focus Prints LLP, Novixa, Mahalaxmi Polypack, Multiplast, Sah Polymers Limited, Satyam Polynits, Terram, BPPL, PDA Tanks, Urmin, Siskon Ventures Pvt. Ltd., Lamex Time Wear, United 18, Remus, Flavaroma, Remember India Health Links Pvt. Ltd., Renova Lifesciences, Prima Chemicals, Alpine Health, Aveon Cafe