

# What is opentaps?

*One Minute Tour of Open Source ERP + CRM*

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Si Chen  
Open Source Strategies, Inc.

opentaps is an Open Source  
ERP and CRM system

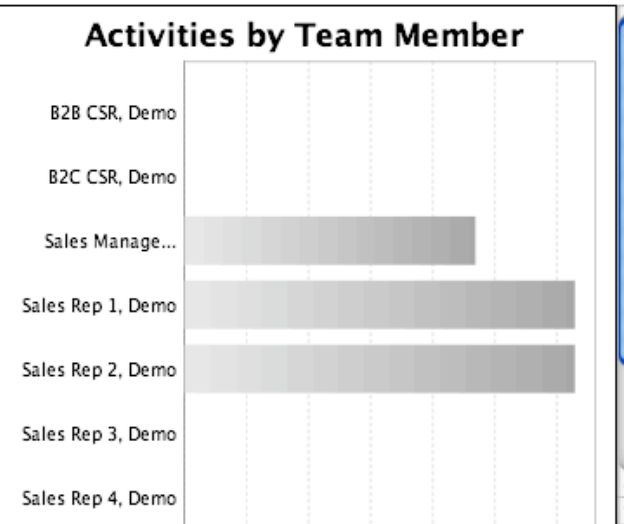
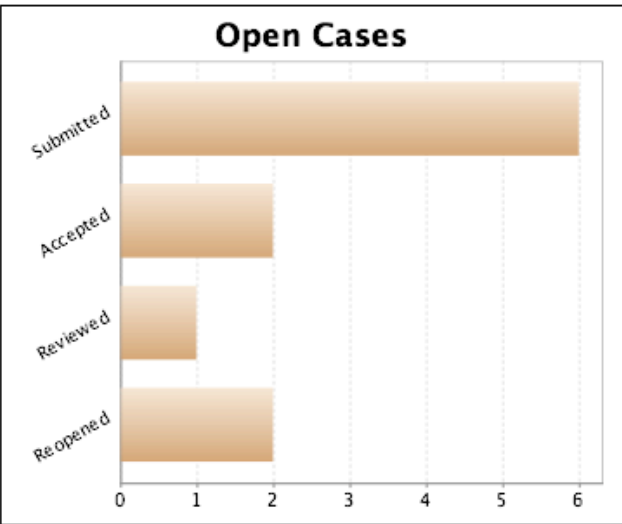
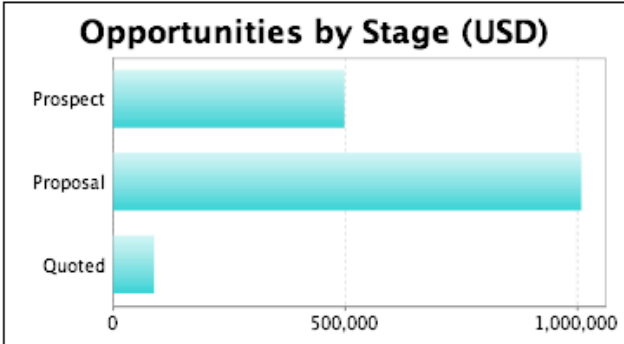
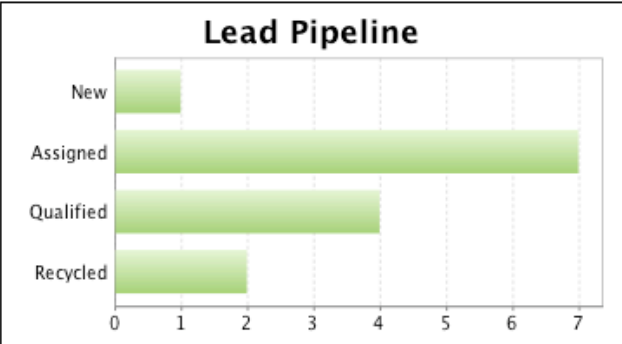
opentaps helps bring together  
all parts of your business...

# From your Customers ...



- Shortcuts
- Dashboard
- My Calendar
- Create Lead
- Create Account
- Create Contact
- Create Opportunity
- Create Quote
- Create Case
- Create Order
- Write Email
- Log Call
- New Task
- New Event

## Dashboard



# ... to your Suppliers ...



### Shortcuts

- [Find Suppliers](#)
- [Create Supplier](#)
- [Outsource a Task](#)

## Find Suppliers

Find by

**Name** | **Id** | **Phone** | **Advanced**

Supplier Name:

### Supplier List

Supplier Id	Supplier Name	Address	City	State / Province	Phone Number	Email Address
10000	Sangfroid Paper Ltd.					
10005	searchsupplier					
10025	Account for testInvo...	2004 Factory Blvd	City of Industry	CA	1 800 555-2106	demo.supplier@exa...
10029	Supplier for testPurc...	2004 Factory Blvd	City of Industry	CA	1 800 555-2106	demo.supplier@exa...
10033	Supplier for testBasi...	2004 Factory Blvd	City of Industry	CA	1 800 555-2106	demo.supplier@exa...
10056	Test supplier 1 for a...	2004 Factory Blvd	City of Industry	CA	1 800 555-2106	demo.supplier@exa...
10057	Test supplier 2 for a...	2004 Factory Blvd	City of Industry	CA	1 800 555-2106	demo.supplier@exa...
10064	Demo Supplier	2004 Factory Blvd	City of Industry	CA	1 800 555-2106	demo.supplier@exa...
10074	Supplier for testPurc...	2004 Factory Blvd	City of Industry	CA	1 800 555-2106	demo.supplier@exa...
10075	Supplier for testPurc...	2004 Factory Blvd	City of Industry	CA	1 800 555-2106	demo.supplier@exa...
BigSupplier	Big Supplier	2005 Industrial Park ...	New York	NY	1 555 555-2368	big.supplier@exampl...
DemoAcctBalSupplier	Demo Supplier for ...					
DemoSupplier	Demo Supplier	2004 Factory Blvd	City of Industry	CA	1 800 555-2106	demo.supplier@exa...
EuroSupplier	European Supplier	2005 Boulevard Indu...	Roissy		33 06 07 08 09 10	euro.supplier@exam...
externaluser						

# ... to your Warehouse ...



Welcome Demo Employee One [Profile](#) [Logout](#)  
Warehouse: Web Store Warehouse ([Change](#))

[Shortcuts](#)

[My Home](#) [Inventory](#) [Shipping](#) [Manufacturing](#) [Configuration](#) [opentaps](#)

## Shortcuts

Ready To Ship
Incoming Shipments
Outgoing Shipments
Create Picklist
Open Picklists
Picklists to be Shipped
Pack Order
Schedule a Shipment
Batch Schedule Shipments
Print Shipping Labels

## Ready To Ship

Order Date	Order/ShipGroup	For	Ship Via	Ship By Date	
4/23/08 16:49:27	DEMO10090 / 00001 (PDF)	Demo Customer	UPS Guaranteed Next Day		<a href="#">Pack Order</a>
10/15/09 03:15:00	TEST10000 / 00001 (PDF)	Demo Sales Account No. 1	UPS Ground		<a href="#">Pack Order</a>
10/15/09 10:40:30	TEST10002 / 00001 (PDF)	Demo Customer	Demo Carrier Ground		<a href="#">Pack Order</a>
10/30/09 14:13:07	WS10001 / 00001 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:13:55	WS10004 / 00001 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:13:58	WS10005 / 00001 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:14:01	WS10006 / 00001 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:15:31	WS10017 / 00001 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:15:34	WS10018 / 00001 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:16:12	WS10021 / 00001 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:16:12	WS10021 / 00002 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:17:27	WS10028 / 00001 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:17:32	WS10029 / 00001 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:17:36	WS10030 / 00001 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:17:39	WS10031 / 00001 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:17:48	WS10033 / 00001 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:17:57	WS10035 / 00001 (PDF)	Demo Sales Account No. 1	Standard		<a href="#">Pack Order</a>
10/30/09 14:18:00	WS10036 / 00002 (PDF)	Demo Customer	Standard		<a href="#">Pack Order</a>
10/30/09 14:18:00	WS10036 / 00001 (PDF)	Demo Customer	Standard		<a href="#">Pack Order</a>
10/30/09 14:28:57	WS10055 / 00001 (PDF)	Demo Customer	Standard		<a href="#">Pack Order</a>
10/30/09 14:57:39	WS10070 / 00001 (PDF)	Demo Customer	Standard		<a href="#">Pack Order</a>
10/30/09 15:05:04	WS10094 / 00001 (PDF)	Demo Customer	Standard		<a href="#">Pack Order</a>

# ... and Accounting

For Your Company Name Here (Company)  
10/30/09

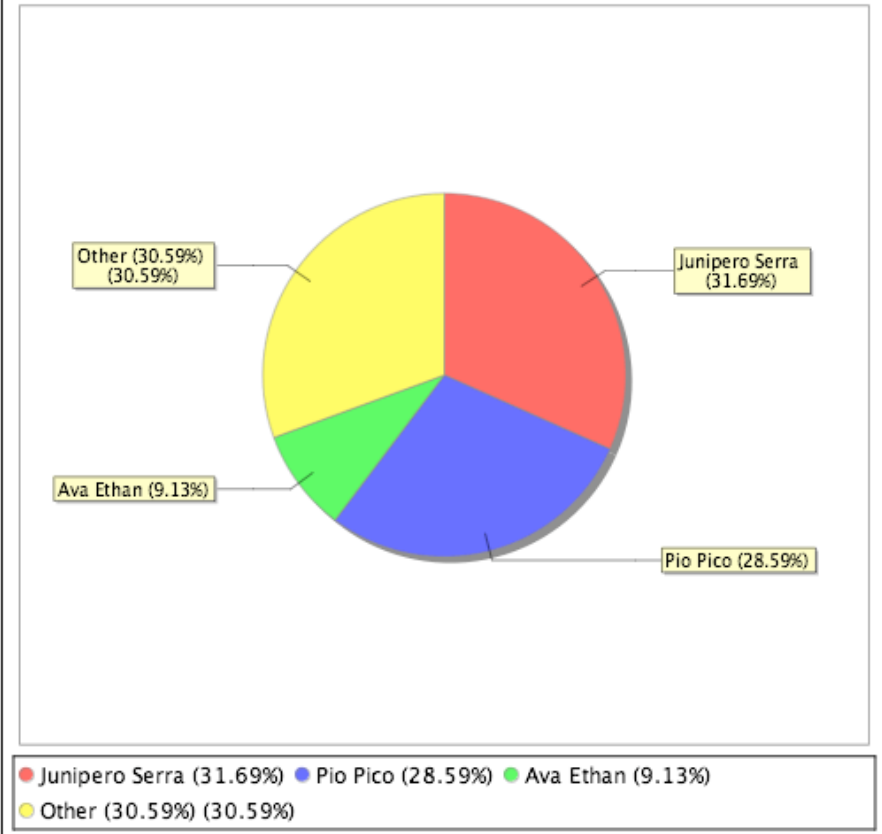
Party ID	Name	Balance	
10013	Demo Customer	\$48.24	✓
10014	Junipero Serra	\$6,698.32	✓
10015	Pio Pico	\$6,043.82	✓
10027	Account for testVoidPayment	\$77.95	✓
10030	Account1 for testFinanceCharges	\$250.00	✓
10031	Account2 for testFinanceCharges	\$501.64	✓
10037	Daniel William	\$256.00	✓
10038	Jacob Joshua	\$385.00	✓
10039	Anthony Abigail	\$398.00	✓
10040	Emily Abigail	\$500.00	✓
10041	Ava Ethan	\$1,929.00	✓
10042	Customer for testSetInvoiceReadyAndCheckIfPaidToInvoiceReady	\$10.00	✓
10046	Account for testAccountBalancesSnapshot	\$50.00	✓
10084	Import Customer 2 Co.	\$100.00	✓
10086		\$100.00	✓
10087	Important Account	\$100.00	✓
10088	Import Customer for Automated Testing (keep this name unique)	\$99.00	✓
accountlimit100	Credit Limited Account	\$99.00	✓
DemoAccount1	Demo Sales Account No. 1	\$1,019.70	✓
DemoCustCompany	Demo Customer Company	\$551.14	✓

Calculate Statement by

Total Outstanding

\$21,136.40

Customers with balances over 5% of total



# So you can work together more effectively

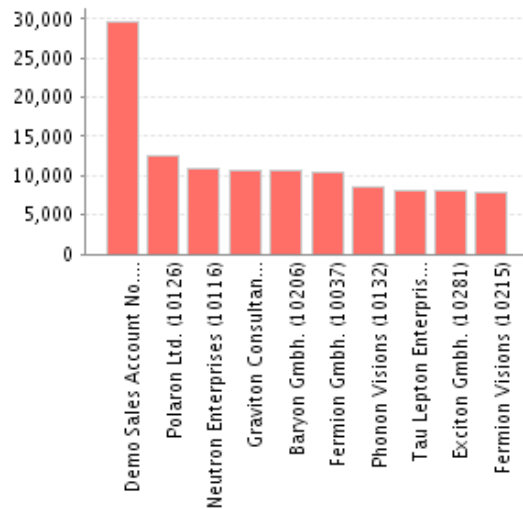


# And make better decisions



## Customers

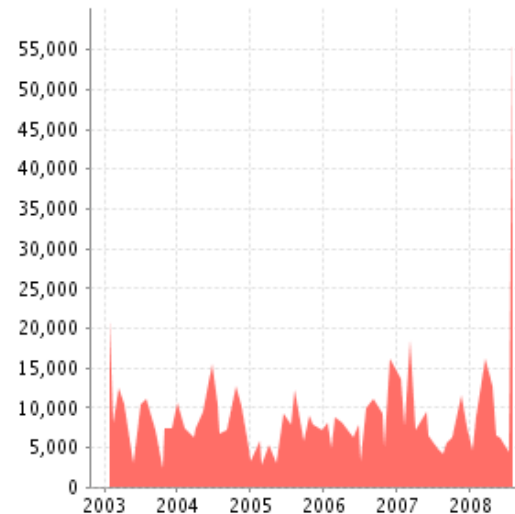
### Top Customers



- [Map of Customers](#)
- [Customers Details](#)
- [Customer Reports](#)

## Sales

### Sales Trend



- [More Sales Dashboards](#)
- [Sales Reports](#)

# Because opentaps is Open Source

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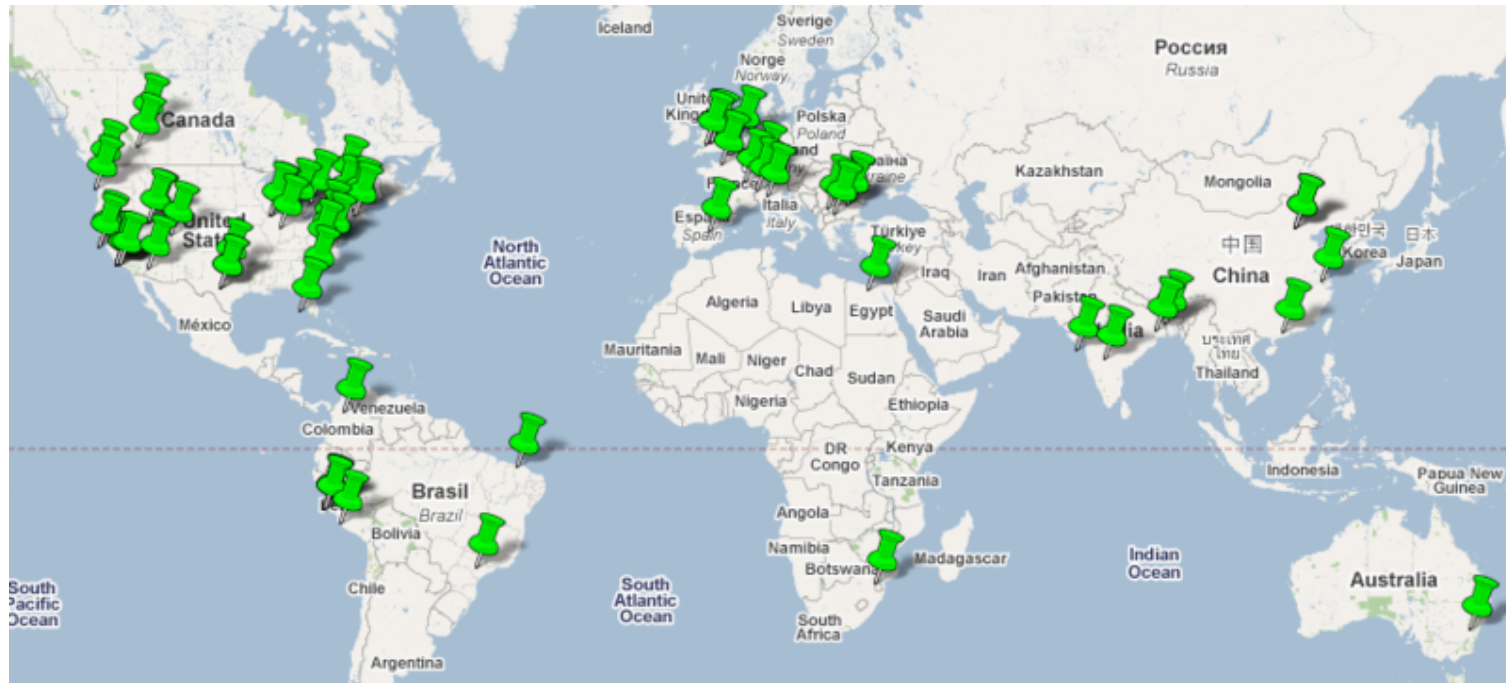
You can:



- Download
- Customize
- Use
- Distribute

opentaps for **free**

# Who uses opentaps?



- Manufacturers
- Online retailers
- Retailers
- Software Vendors
- From Startups to Fortune 500

# To Learn More

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Go to

<http://www.opentaps.org>

for

- Case Studies
- Tutorials
- Download opentaps
- Join our community

**Start Using opentaps Today**