

What is opentaps?

One Minute Tour of Open Source ERP + CRM

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 ...



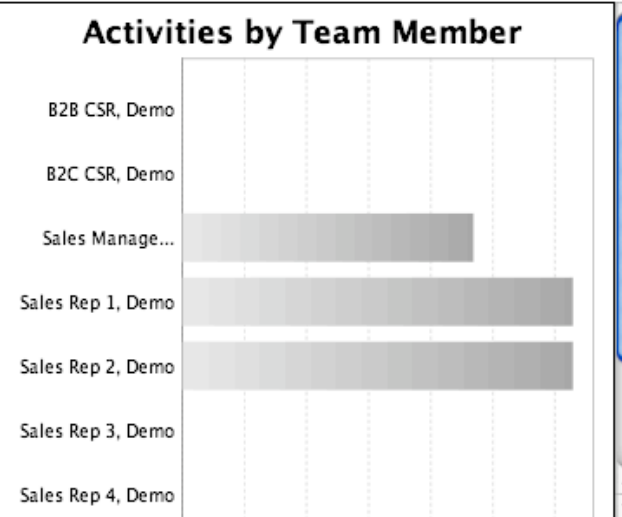
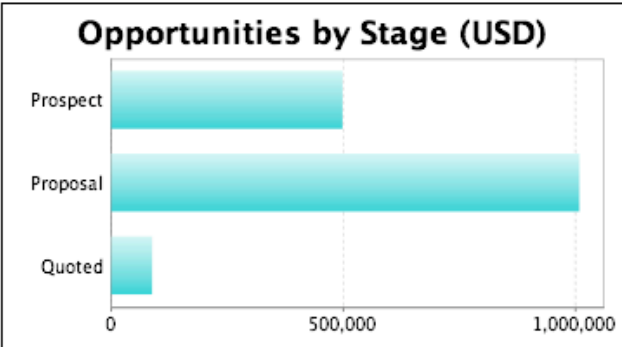
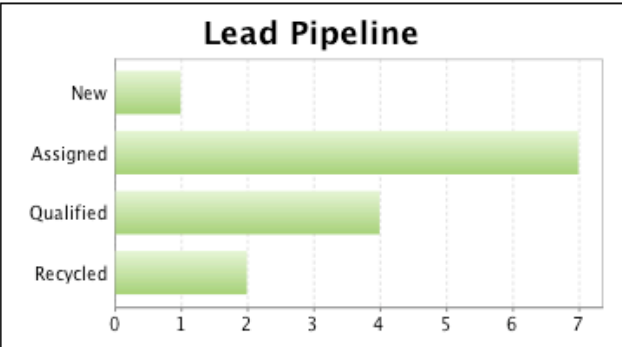
Welcome Demo Sales Manager [Profile](#) [Logout](#)
[Shortcuts](#)

[My Home](#) [Leads](#) [Contacts](#) [Accounts](#) [Cases](#) [Activities](#) [Opportunities](#) [Quotes](#) [Orders](#) [Forecasts](#) [Marketing](#) [Partners](#) [Teams](#) [Reports](#) [opentaps](#)

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		Pack Order
10/15/09 03:15:00	TEST10000 / 00001 (PDF)	Demo Sales Account No. 1	UPS Ground		Pack Order
10/15/09 10:40:30	TEST10002 / 00001 (PDF)	Demo Customer	Demo Carrier Ground		Pack Order
10/30/09 14:13:07	WS10001 / 00001 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:13:55	WS10004 / 00001 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:13:58	WS10005 / 00001 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:14:01	WS10006 / 00001 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:15:31	WS10017 / 00001 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:15:34	WS10018 / 00001 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:16:12	WS10021 / 00001 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:16:12	WS10021 / 00002 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:17:27	WS10028 / 00001 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:17:32	WS10029 / 00001 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:17:36	WS10030 / 00001 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:17:39	WS10031 / 00001 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:17:48	WS10033 / 00001 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:17:57	WS10035 / 00001 (PDF)	Demo Sales Account No. 1	Standard		Pack Order
10/30/09 14:18:00	WS10036 / 00002 (PDF)	Demo Customer	Standard		Pack Order
10/30/09 14:18:00	WS10036 / 00001 (PDF)	Demo Customer	Standard		Pack Order
10/30/09 14:28:57	WS10055 / 00001 (PDF)	Demo Customer	Standard		Pack Order
10/30/09 14:57:39	WS10070 / 00001 (PDF)	Demo Customer	Standard		Pack Order
10/30/09 15:05:04	WS10094 / 00001 (PDF)	Demo Customer	Standard		Pack Order

... and Accounting

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

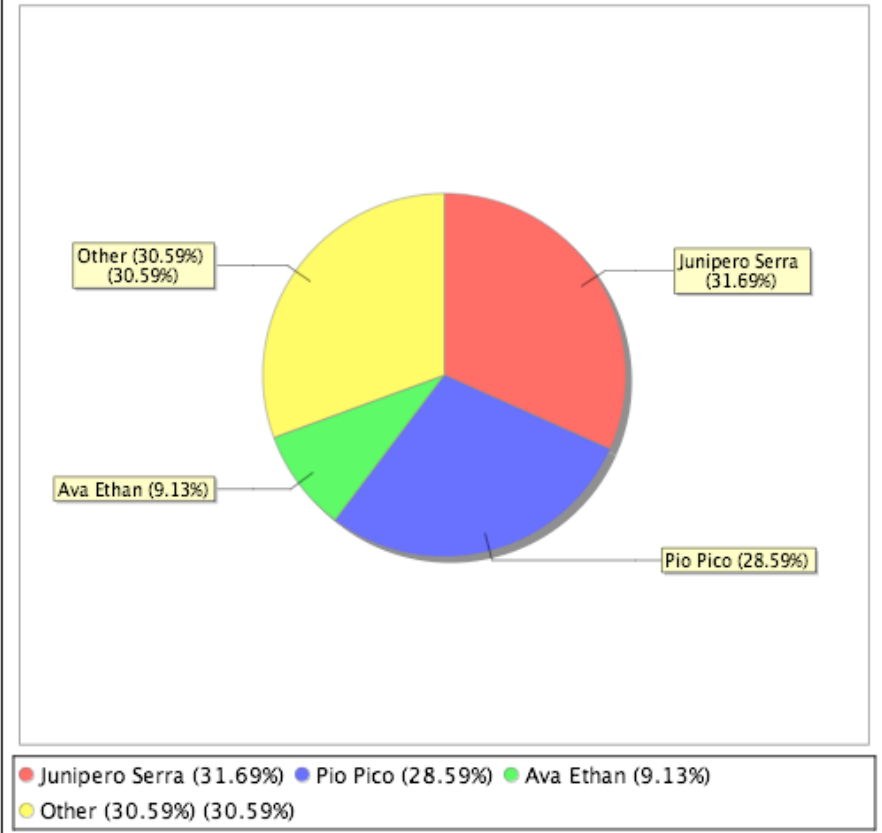
Party ID	Name	Balance	
10013	Demo Customer	\$48.24	✓
10014	Junipero Serra	\$6,698.32	✓
10015	Pio Pico	\$6,043.82	✓
10027	Account for testVoidPayment	\$77.95	✓
10030	Account1 for testFinanceCharges	\$250.00	✓
10031	Account2 for testFinanceCharges	\$501.64	✓
10037	Daniel William	\$256.00	✓
10038	Jacob 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

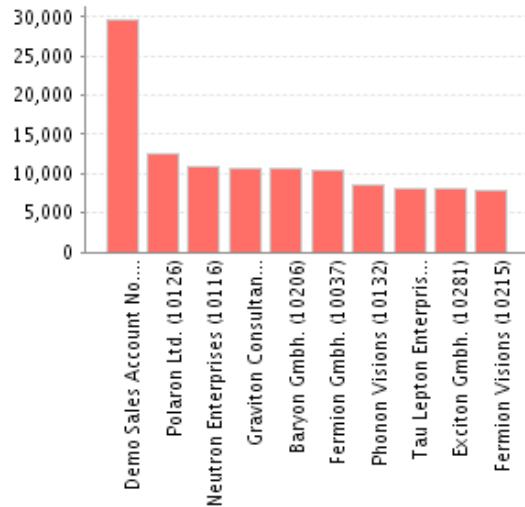


And make better decisions



Customers

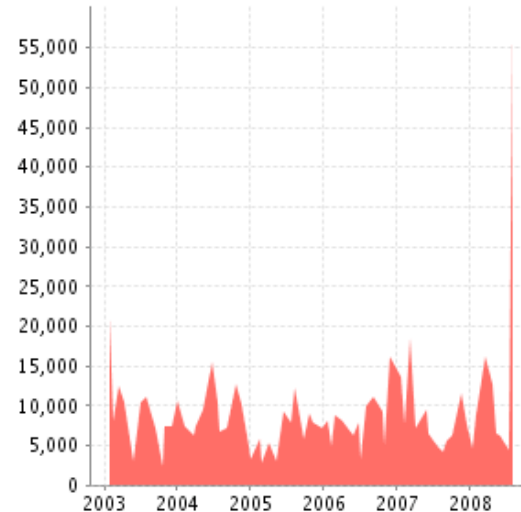
Top Customers



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

Sales

Sales Trend



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

Because opentaps is Open Source

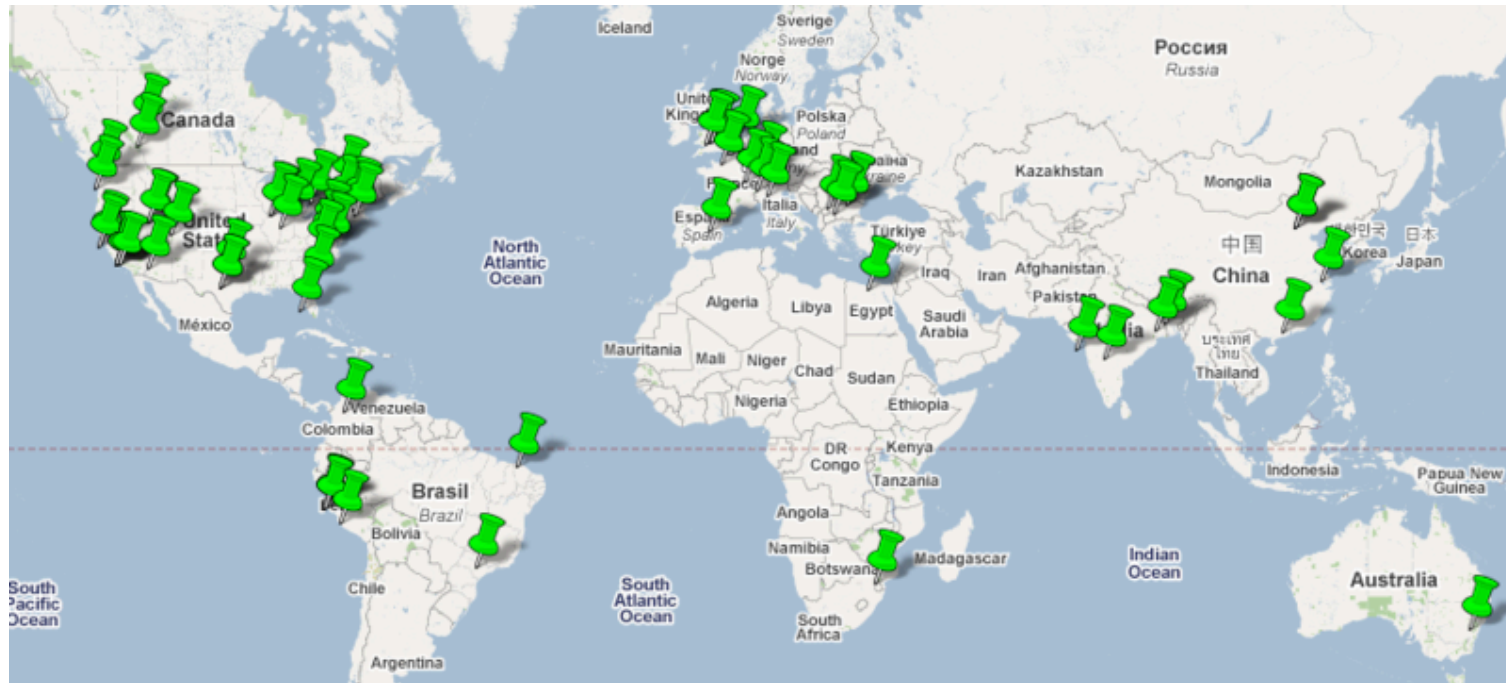
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