Managing a service business with Tryton

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What’s in the menu for this talk?

Traditional ERP usage

Vs

Service Business Usage
What are traditional business?

- They sell physical products
- They have a warehouse or a physical shop
- There are some that manufacture their products
Why focusing service business?

Service companies are raising year by year:

- Digital services
- Saas companies
- Consulting & Advices

Technology eases the creation of service focused business
What does it mean for ERP usage?

- They work on different functional areas
- They need a different set of Tryton modules
- But there is some common usage
Typical vs Services functional areas

**Traditional:**
- Accounting
- Sales
- Warehouse
- Purchases
- Production

**Services:**
- Accounting
- Sales
- Subscriptions
- Purchases
- Projects
Accounting: Every body needs accounting

The basics:

• Invoicing
• Account moves
• Tax reporting
• Balances, Income Statement
• Assets
Accounting: Most of use will also use

Extra functionalities:

- Bank Statements
- Payments (SEPA)
- Dunning
- Credit Limit
Sales: Everyone wants to sell

Good set of functionalities for services:

- Quotations and Orders
- Leads and Opportunities
- Promotions
- Commissions
- Complaints
Sales: Everyone wants to sell

But still missing:

- Store all customer activity history
- Link between opportunities and projects
- Minimal e-shop
- ...
- What are you missing?
Subscriptions: Mostly used by services

State of art:

- Simple but very powerful base module
- Good integration for asset subscriptions

Nice to have additions:

- Active commissions price update
- Subscription related tasks
- Cost and revenue tracking by subscription
On service companies:

- Only purchase invoices are required
- Also purchase assets

But also:

- Great link between purchases and projects
Project: The hidden one

**State of art:**

- Simple but very powerful base module
- Good expense and revenue tracking
- Complete planning (but we’ve never needed it)

**But I’m still missing:**

- Fixed amount projects invoicing
- Gantt View
Bonus question:

Mixing warehouse and service business: Is this possible?
Mixing Service and Warehouse business

Example:

- Sell assets and related maintenance services

Requirements:

- They need some part of both worlds
- Good integration between all modules
¿Questions?

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