

Coopengo: How we used tryton to build an Insurance ERP

A brief history of the coog construction from the first tryton module to a fully featured scalable application



Oct 17, 2016



Speakers





Romain Seon Founding partner at Coopengo



15 years experience in ERP implementation
projects
Implementation



bouyques



- 10 years experience in insurance projects
- Founding partner of Coopengo

- 13 years experience in Insurance solution development
- 3 years experience in project management at Coopengo





- Why we created coopengo
- The Insurance business
- What is needed in an Insurance ERP?

Summary

- Why we chose tryton
- A brief history of coog
- What is coog?
- Some realizations
- Demonstration







- Coopengo was created in 2012 by insurance software experts
- What was the market back then?
 - Locked-in market
 - High licence fee (50k€ to 2M€)
 - Long presales step (6 months to more than a year)
 - Small and mid-size customer can not afford to access to the market
 - Customers stuck with 80's AS400 solutions
 - No solution flexible enough
 - No freedom from the ERP vendor
- What we wanted to offer :
 - Free license solution
 - Fully flexible solution
 - Standard solution
 - Customer autonomy



The Insurance Business 1/2









What is needed in an insurance ERP?



Front Office

Quotation and coverage comparison

Customer portal

Business partners portal



Back Office

Contract management



- Contract subscription
- Endorsements (contract modification)
- Premium management



- Calculate premium according to many criteria (age, insured amount, distribution network,)
- Calculate different commissions (fixed rate, variable rate, pre-payment) between the different parties involved (insurer, broker, TPA, distribution, ...)
- Generate periodic invoices on big database (1 M contracts -> 1 M invoices billed once a month)
- Generate bank file for direct debit payment (SEPA for Europe)
- Automatic dunning and contract resiliation if bill is unpaid.
- Rule & workflow engine to easily create new insurance products through configuration





Pros

- attractiveness of the language (python over java)
- modularity of the solution
- more a framework than a plug & play solution
- scalable solution (more a leap of faith than a rational choice at the time)
- support & formation by the b2ck company
- price
- Some kind of freedom (no string attached)



Cons

- no web client
- timid community
- specialized solution less known by end users customers



A brief history of coog







What is Coog







Coog technical solution









- Technical functionalities
 - trytond_celery
 - dict fields
 - Oracle backend (beta)
 - O2M cartesian product
 - client prevalidation
 - per user plugins
 - multi-selection widget
 - history browser
 - factor attribute on client views
 - global search
 - paste in editable list view
 - allow to store the views in a XML file instead of the database
- Business functionalities
 - account move template
 - commission
 - bank
 - sepa payment
 - clearing
 - reconciliation wizard
 - tax rounding per line



Some realizations



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Revision blame



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More information



• github.com/coopengo







• https://www.npmjs.com/~coopengo



Subscription Process Demo



