

**INFORMATICS**  
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# InfoERP

**An Enterprise Resource Planning System**



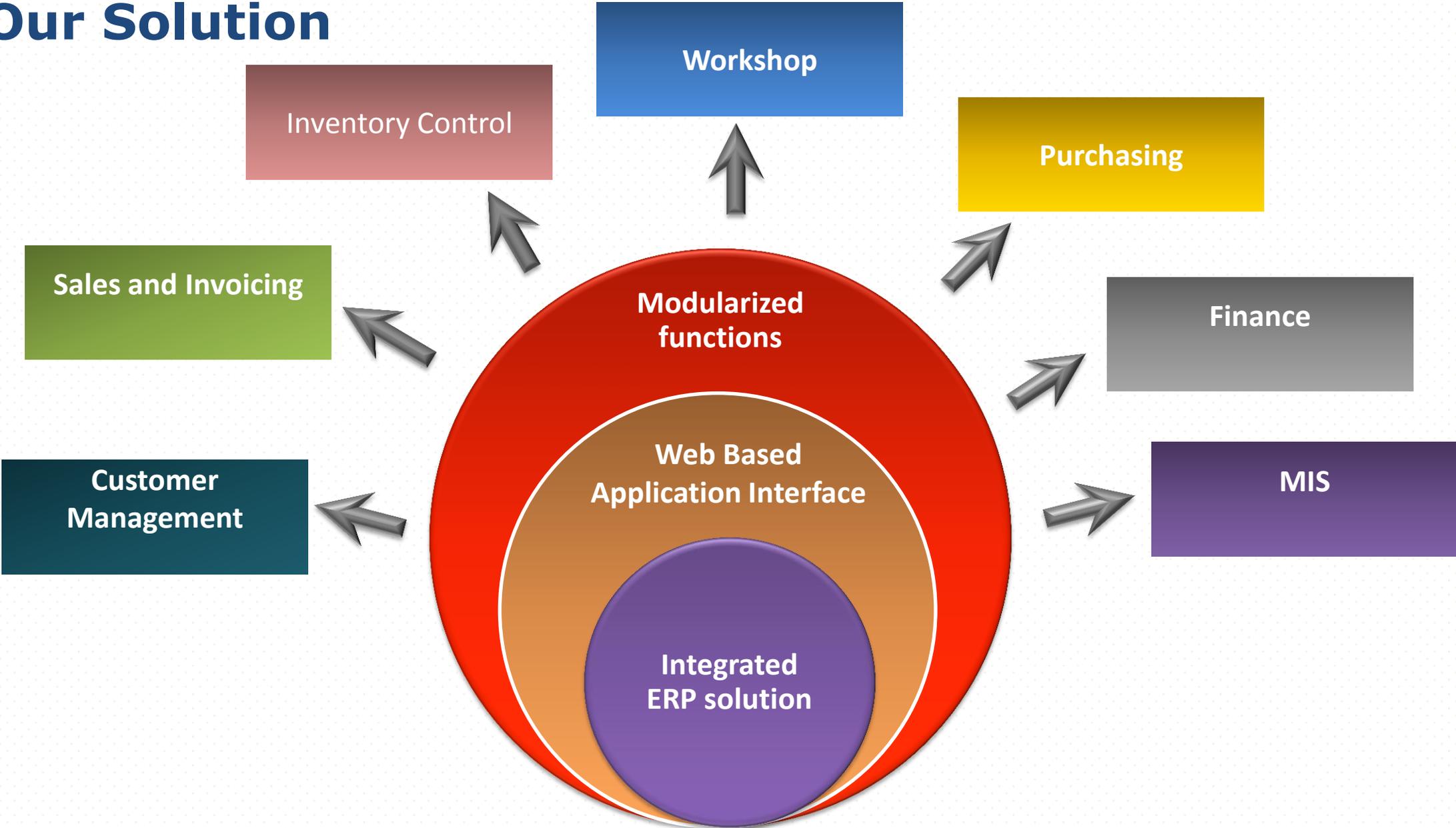
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# Overview of InfoERP

- 1 • Stream lines operations gaining edge in Automobile business
- 2 • Workshop automation in Automobile operation with Back-Office Financial management
- 3 • Ultimate control over stock movement & JIT Stock Purchase
- 5 • End-to-end modular suite for Automobile Dealers
- 4 • MIS Reports for better decision making



# Our Solution



# Customer Management

- Maintenance of customer details
- Different customer groups
- Exclusive customer groups
- Customer search
- Customer profile creation
- Maintain customer history details

The image displays three overlapping screenshots of the ABC Motors web application interface, illustrating the customer management process.

**Top Panel: CUSTOMER PROFILE**  
The interface shows a navigation menu with options: Spare Part Sales, Vehicle Sales, Workshop, General, References, Other, MIS Reports, and Logout. Below the menu, there are radio buttons for 'Create' and 'Search'. A breadcrumb trail includes: General | Addresses | Identification | Tax | Account | Vehicle Detail. The 'General' section is active, showing a 'Customer Type' dropdown set to 'GENERAL CUSTOMER' and a 'Customer Code' input field.

**Middle Panel: DISCOUNT & PROMOTIONS**  
This panel features a table for managing discounts and promotions. The table has columns for 'Promotion Type', 'Discount For', and 'Sales Type'. Each row includes a 'Save' button (represented by a floppy disk icon).

**Bottom Panel: CLUB MEMBER**  
This panel is for managing club members. It includes a navigation menu and a 'CLUB MEMBER' section. Fields include: 'Customer Code' (with a search icon), 'Club' (dropdown set to 'PRIVILEGE CIRCLE'), 'Membership No', 'Customer Name', 'Address' (with a scroll bar), 'Telephone', 'Membership Type' (dropdown set to 'FLEET OWNER'), 'Promotion Type' (with a search icon), 'Promotion Rate', 'Membership Vehicle' (dropdown), 'Granted Date' (29/06/2014 with a calendar icon), 'Renewal Date' (29/06/2014 with a calendar icon), 'Valid Until' (29/06/2014 with a calendar icon), 'Receipt Date' (29/06/2014), 'Entrance Fee', 'Receipt No' (with a search icon), 'Subscription', and an 'Active' checkbox. At the bottom, there are 'Add' and 'Set' buttons, and a 'Save' button with a 'Clear' button.

# Sales and Invoicing

- Inquiry (vehicle models/options)
- Generate counter slips
- Generate quotations
- Invoice (proforma/commercial/final)
- Sales types (cash, credit, lease)
- Settlement discount facility
- Flexible discounts & promotions
- Invoice based on sales order

The screenshot shows the 'ABC Motors' software interface. At the top, there is a navigation menu with options: Spare Part Sales, Vehicle Sales, Workshop, General, References, Migration, MIS Reports, and Logout. The main section is titled 'VEHICLE SALES INQUIRY'. It contains several input fields and buttons. On the left, there are fields for Sales Location (350), Customer Category, Customer Code, Customer Address, Phone No(s), Supplier Code, Sales Rep, and Leasing Company. On the right, there are fields for Inquiry No, Date (29/06/2012), Valid Upto (29/07/2012), Sector, and Inquiry Type. Below these are fields for Make, Product, Model, and Package. At the bottom, there are fields for Ext. Color, Int. Color, Engine No, and Required Qty. There are also buttons for 'Check Availability', 'Clear Details', 'Vehicle Details', and 'Vehicle Items'. A 'Total' field is at the bottom right, with 'Save', 'Print', and 'Clear' buttons next to it. An 'Update Price' button is at the bottom left.

# Sales and Invoicing

- Inventory tracking
- Reservations (vehicles/spare parts)
- Prepare delivery note
- Sales return – Issue credit note

ABC Motors

Spare Part Sales ▼
Vehicle Sales ▼
Workshop ▼
General ▼
References ▼
Migration ▼
MIS Reports ▼
Logout

**SPARE PART INVOICE**

Quotation No

Sales Location  SPARE PARTS - MAIN COUNTER -

Part Type

Sales Promoter

Sales Type

Promotion Type

Customer Code

Address

Postal Co

Counter Slip No

Invoice No  Date

Invoice Cancel

Order Ref. No

Customer Cat

ABC Motors

Spare Part Sales ▼
Vehicle Sales ▼
Workshop ▼
General ▼
References ▼
Migration ▼
MIS Reports ▼
Logout

**VEHICLE INVOICE RETURN**

Invoice No

Inquiry No

Sales Location

Customer Code

Customer Cat

Leasing Company

Customer Address

Reason

Return No

Date

Sales Type

Cr Acc

Sales Promoter

Unit Price

Discount

Tax

Total

Product

Model

Engine No

Package

Stock No

Chassis No

Reg No

# Inventory Control

- Inter-location transfer
- Internal issue of items
- On-line status of items
- Bin to Bin transfers
- Stock verification, Variance report
- Stock adjustments
- Stock valuation, Obtain age - analysis

The screenshot displays three overlapping windows from the ABC Motors software interface. Each window has a header with the ABC Motors logo and a navigation menu with options: Spare Part Sales, Vehicle Sales, Workshop, General, References, Other, MIS Reports, and Logout.

**Top Window: CHECK AVAILABILITY**  
 This window contains a form with an 'Item' field and a search icon.

**Middle Window: SPARE PART ISSUE**  
 This window contains a form with fields for 'MRN No', 'Res No', and 'GTN No'.

**Bottom Window: INTERNAL ISSUE**  
 This window contains a form with the following fields:  
 - Sales Type: SL07  
 - Request From: INTERNAL SALES  
 - Supply From: 102  
 - Item Type: STORES - SPARE PARTS - HEAD OFFIC  
 - Sales Promoter: [empty]  
 - Promotion Type: [empty]  
 - Internal Issue No: [empty]  
 - Issue Date: 29/06/2014  
 - Remarks: [empty]

Below the form is a table with the following columns: Item Code, Description, UOM, Qty Available, Unite Price, and Qty Requested. The table is currently empty.

At the bottom right of the INTERNAL ISSUE window, there is a summary table:

Net Total	0.00
Discount	0.00
Grand Total	0.00

Below the summary table are three buttons: Save, Print, and Clear.

# Workshop

- System generated repair estimate
- Repair job open/close
- Proforma / Final invoicing for jobs
- Workshop reservation
- Service / Repairs/ Warranty jobs
- Maintenance of company vehicles
- Loyalty schemes
- Repair job history

The screenshot shows the 'ABC Motors' software interface. At the top, there is a navigation menu with options: Spare Part Sales, Vehicle Sales, Workshop, General, References, Other, MIS Reports, and Logout. The main area is titled 'ESTIMATE' and contains several input fields and buttons. On the left, there are fields for Branch (01), Cost Center, Service Adv., Reg No, Make, Product, and Model. On the right, there are fields for Estimate No, Date (29/06/2014), Valid Up To (29/07/2014), Remarks, and Estimate Type (EXTERNAL). Below these, there are fields for Customer Code, Customer Cat, Address, Tax, and Created By. At the bottom, there are buttons for 'Add Labour', 'Spare Parts', 'Insurance', 'Print Letter', 'Print with Items', 'Edit Print', 'Final Print', 'Print Spare Parts', 'Save', 'Cancel Confirmation', 'Revalidate', 'Fax Print', and 'Clear'. A summary table on the right side of the form shows: Total Labour, Total Spares, Total Raw Material, Grand Total, Total Tax, and Last Modified By.

# Workshop

- Job costing
- Sub contractor services
- Work in-progress reports
- System generated gate pass

**ABC Motors**

Spare Part Sales | Vehicle Sales | **Workshop** | General | References | Other | MIS Reports | Logout

**JOB OPEN**

Branch 01 HEAD OFFICE Job No [ ]  
Referred [SELECT] Date 29/06/2014  
Cost Centre [ ] Service Adv. [ ]  
Reg No [ ] Mileage [ ] Sales Type [SELECT]  
Make [ ] Job Type [ ]  
Product [ ] EDC 29/06/2014 Date Of Sale [ ]

Customer Code [ ] Debit Acc. [ ] **Vehicle Owner**

Customer Cat [ ]  
Address [ ]

Tax [ ]

Order Ref. No [ ]

Mobile No [ ]

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**ABC Motors**

Spare Part Sales | Vehicle Sales | **Workshop** | General | References | Other | MIS Reports | Logout

**SEARCH JOB HISTORY**

MATERIAL  LABOUR

Branch ALL

Vehicle No [ ] Job No [ ]  
Chassis No [ ] Invoice No [ ]  
Item/Labour Code/Desc [ ]

**Search** **Clear**

# Purchasing

- Streamlined process– reduce data entry
- Automated order schedule (Demand Sheet)
- Purchase requisition, Request for quotation
- Purchase order, Invoice, GRN
- Supplier maintenance
- Automated costing process & Generation of suggested selling price
- Facilitates local and foreign purchase
- Add additional items to inventory through bulk purchasing

The screenshot displays the 'Purchase Order' form in the Informatics software. The interface includes a title bar with 'Purchasing' and 'PU.2.7 Purchase Order'. Below the title bar are navigation icons and the Informatics logo. The main form is divided into several sections:

- Order Details:** Contains fields for Originator, Item Category, Order Type, Order Mode (set to 'Foreign'), Supplier Address, Order No, Order Method, Currency, Payment Term, and Default Currency Rate. It also includes a 'Mail Text' button and a 'Remarks' text area.
- Summary Fields:** Includes Order Date, Total Discount (0.00), Total Tax Amount, Freight Amount, Other Charges, and All Inclu. Price (0.00).
- Item Details:** A table with columns for Item Code, Description, Unit Price, Unit Discount (Amount and %), Qty (Requested, Issued, Ordered), Discount, Amount, and Other. The table shows a total value of 0.00.
- Tax Details:** A table with columns for Tax Code, Tax Description, and Tax Amount.

At the bottom right of the form, there are radio buttons for 'Sea Freight', 'Air Freight', and 'None' (which is selected).

# Purchasing

- Track inventory across stores
- Maintenance of binning schedule
- Price comparison report

The image displays two overlapping screenshots of the Informatics Purchasing software interface. The top window, titled 'PU.2.12 Supplier Invoice', shows a form for generating an invoice. It includes fields for 'Invoice Mode' (set to FOREIGN), 'Invoice Type' (Manual Invoice), and 'Invoice Date' (29-JUNE-2014). There are also buttons for 'Generate Invoice', 'Requested Items', 'Authorization', and 'Finance'. The bottom window, titled 'PU.2.11 Costing Process', shows a form for managing costing. It includes fields for 'Location', 'Item Category', 'Supplier', 'Invoice No', 'Date', 'Import File No', 'Currency', 'Default Exchange Rate', and 'Exchange Rate'. It also features a table for 'Primary Charges' with columns for 'Charge Code', 'Charge Description', and 'Charge Value'. At the bottom, there are buttons for 'Reverse Costing Proce...', 'Costing Report', and 'Price Comparison Report'.

# Finance

- Total integration of all modules
- Journal maintenance
- Budget allocation
- Reconciling bank statements
- Report generation facility
- Financial statements design



# Finance – Accounts Payable (AP)

- Capture payment voucher details
- Reconcile bank payments
- Handle partial / scheduled payments
- Maintain petty cash payment details
- Handle Supplier Advance Payments
- Creditor Journals
- Cheque printing

Finance System

4.5 Payment Voucher Preparation

UML 29-JUNE-2014

Company 01 HEAD OFFICE

Branch [ ] Date 29/06/2014

Bank Control Account 1000005822102 NDB BANK LTD Voucher No [ ]

Currency Code [ ] Cheque Type ACPAY

P. V. Type [ ] Bank Code Serial [ ]

Creditor Code [ ]

Customer Code [ ]

Debtor Code [ ]

Payee Name [ ] Det...

Narration [ ]

Cheque in Favour of [ ]

Branch	Ref. No(Inv/Credit Note)	Date	Description	Amount	Pay Amount	Settled Amount
<input checked="" type="checkbox"/>	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
<input type="checkbox"/>	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
<input type="checkbox"/>	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
<input type="checkbox"/>	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]
<input type="checkbox"/>	[ ]	[ ]	[ ]	[ ]	[ ]	[ ]

Tax Code	Description	Tax Amount
[ ]	[ ]	[ ]
[ ]	[ ]	[ ]
[ ]	[ ]	[ ]

Retention Amount [ ] Total Amount (With Taxes) [ ]

Final Amount (Reduce Retention Amount) [ ]

# Finance – Accounts Receivable (AR)

- Receipting(Cash, Cheque, Credit card)
- Debtor settlements
- Reconciling bank receipts
- Debtor journals
- Generation of credit notes
- Report generation facility

Finance System  
2.2 Maintain Debtor Code  
UML 29-JUNE-2014

Company 01 HEAD OFFICE Main Debtor Code  
Customer Code Main Debtor Y/N N  
Debtor Code No of Credit Days  
Debtor Name Debtor Group  
Contact Person  
Main Address  
No  
Street  
City 1  
Country  
Delivery Address  
No  
Street  
City 1  
Country  
Telephone No  
Email  
Fax  
Credit Valid  
Expiry Date

Finance System  
4.3 Receipting  
UML 29-JUNE-2014

Company 01 HEAD OFFICE  
Transaction Type Receipts Trn. Id Rec01  
Receipt Date 29/06/2014 Manual Receipt Date  
Receipt No Manual Receipt No  
Payment Type Currency Code LKR  
Customer Code  
Debtor Code  
Amount Narration  
D/C Accounts  
Debit Account  
Credit Account  
Payment Details  
Cheque Date/  
Pay. Method Bank Code Cheque/Card No Card Exp. Date Tran.No. Amount

Pay. Method	Bank Code	Cheque/Card No	Card Exp. Date	Tran.No.	Amount

Save Print Set Off

# MIS Reports

## Inventory Control Report

- Age Analysis Details Report
- Item Transaction Report (with opening balance)
- Purchase Items Report (Local)
- Daily Transaction Report

## Sales Report

- Cancelled Invoices Report
- Counter/Dealer Sales Analysis Report
- Daily Stock Movement Report
- Dealer List Report
- Sales Value for the Customer Type
- Sales Value for the Invoice Type

## Purchasing Reports

- Service Requisition
- Service Order
- Service Acceptance Note
- Order Schedule
- Binning Schedule
- Service Order Report

## Workshop Reports

- Work In Progress Reports
- Job wise Daily Collection
- Workshop Performance Report
- Vehicle Repair History Report

## Financial Reports

- Financial Statements
- Debtors Statement & Reports
- Creditor Retention Payment Details
- Outstanding Creditor Report

## Finance Reports

- Chart Of Accounts
- Cash Flow Summary
- Outstanding Advances
- Ledger Transaction List
- Balance Sheet
- Profit And Loss – Consolidated
- Profit And Loss - Branch

# Administration

- Secure password protection
- Role based user access control
- Employee maintenance
- Maintenance of roles
- Activate and deactivate user access

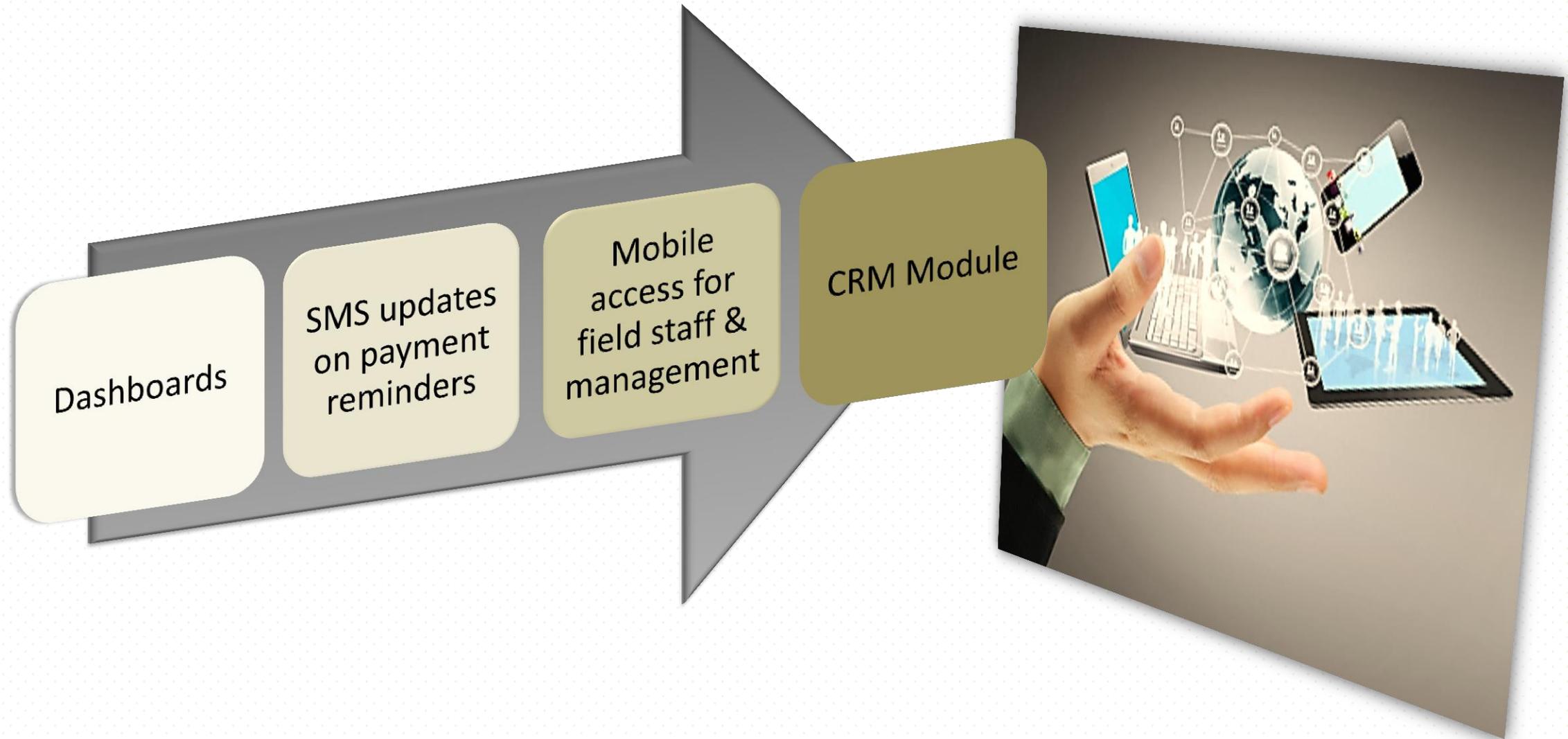
The screenshot displays the ABC Motors software interface. At the top, there is a navigation menu with options: Spare Part Sales, Vehicle Sales, Workshop, General, References, Other, MIS Reports, and Logout. The main content area is titled 'ROLE MANAGEMENT' and shows a dropdown menu for 'Role' set to 'CASHIER'. Below this, there are two tables: 'Function Opretaion' and 'Selected Operation'. The 'Function Opretaion' table lists various functions and their descriptions, while the 'Selected Operation' table shows the selected operations for the 'CASHIER' role.

Function Id	Functoin Description	Operation
1.1	CHECK AVAILABILITY	REPORT LOST SALES
1.1	CHECK AVAILABILITY	QUERY
1.1	CHECK AVAILABILITY	SAVE CHANGES
1.1	CHECK AVAILABILITY	VIEW GRN INFO
1.1		
1.1		
1.10		
1.10		
1.10		
1.10		
1.10		
1.10		

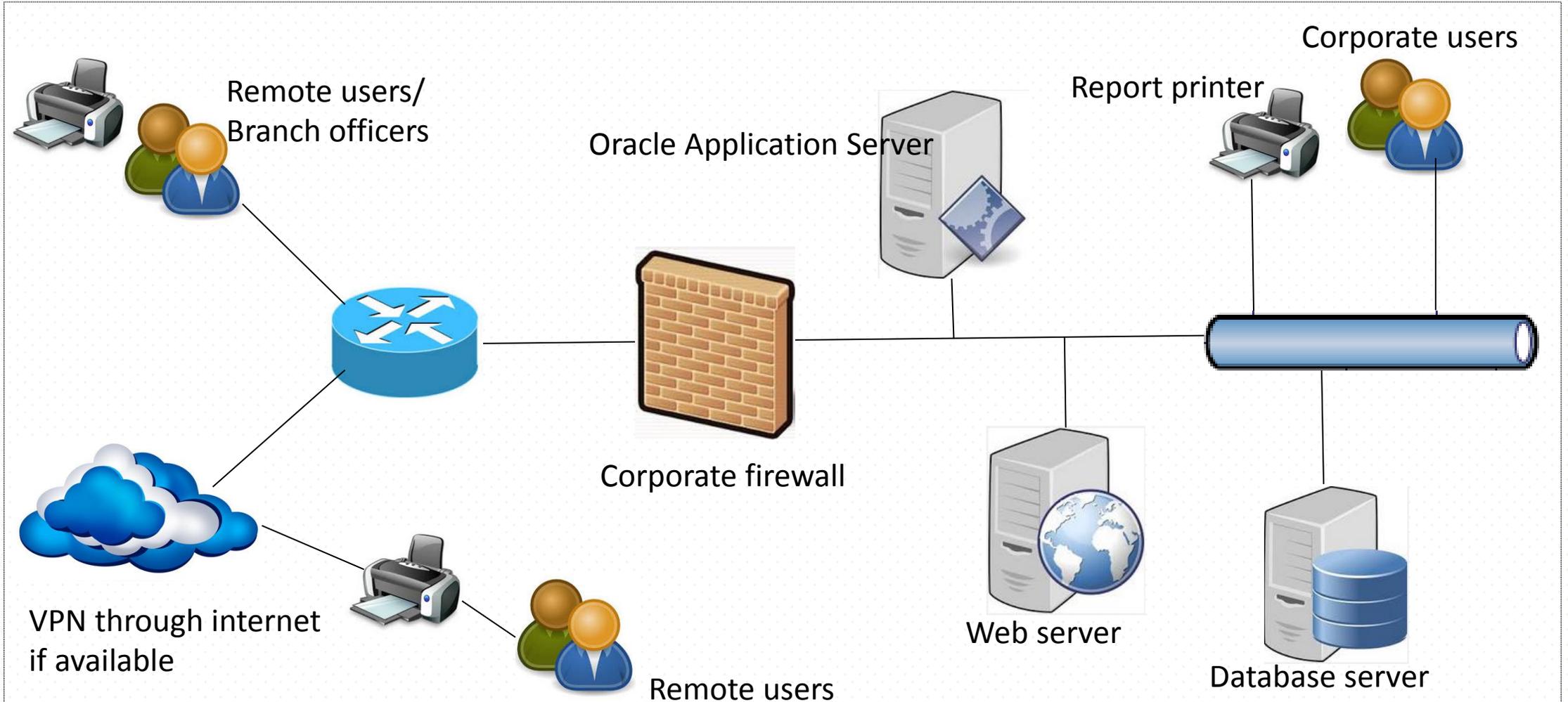
Function Id	Functoin Description	Operation
3.9	JOB INVOICE	PRINT OPERATION
8.3.3	SPARE PARTS INVOICE LIST	PRINT OPERATION
	JOB DAILY COLLECTION	PRINT

The interface also shows a 'Purchasing' window with a toolbar and a 'Change Password' dialog box. The 'Change Password' dialog box includes a password strength indicator: 'Password length should be between 8 - 10 and combination of numbers / characters'. It also features a dropdown menu for 'User' (set to '161 TEST UAT') and input fields for 'Current Password', 'New Password', and 'Confirm New Password'. The 'Save' and 'Clear' buttons are visible at the bottom right of the dialog box.

# High – Level Product Roadmap



# Technology – Accessibility



# Key Business Benefits

All-in-One End-to-End ERP Solution with Workshop & Back-Office Operation for Automobile Business

Designed & Developed Specifically for Workshop Based Operations

Inventory Control with Possibility of practicing JIT Purchasing

End-to-End Solution from one Vendor provides Seamless integration

Provide Best Practices in the Industry

Ability to track progress across processes

MIS Reports for Improved decision making



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