

# Techno ERP Inventory



# & Accounting

**TechnoERP** software is a fully integrated, multi-user, manufacturing and accounting system, available for on-premise or cloud setup. The intuitive user interface makes it easy to use and understand, while behind the scenes the program utilizes powerful algorithms.

Item Type	Item No.	Description	Mfg. Type	UOM	Avg. Cost	Std. Cost
Bearings and Gears	1350-HDBG	Bearing Head Set 16"	Purchased	EA	\$0.00	\$11.25
Bearings and Gears	1360-HDBG	Bearing Head Set 26"	Purchased	EA	\$0.00	\$3.66
Bearings and Gears	9026-TEST	Bike 26" Test	Manufactured	EA	\$0.00	\$1,026.11
Bearings and Gears	100152	E1008	Manufactured	EA	\$132.14	\$132.14
Bearings and Gears	2150-RS10	Rear Sprocket 10 Speed	Purchased	EA	\$0.00	\$2.33
Bearings and Gears	2145-RS5	Rear Sprocket 5 Speed	Purchased	EA	\$0.00	\$5.01
Bearings and Gears	2105-SC	Rear Sprocket Single 16"	Purchased	EA	\$0.00	\$18.00
Bearings and Gears	2126-SC	Rear Sprocket Single 26"	Purchased	EA	\$0.00	\$2.20
Bearings and Gears	100389	Sub Test	Manufactured		\$0.00	\$0.00
Calibration Items	100211	Scale	Purchased	EA	\$0.00	\$0.00
Components	100248	Cable, Assy	Manufactured	EA	\$0.00	\$1.80
Components	XP49SM-F	Carbon fiber front wheel	Purchased	EA	\$0.00	\$0.00
Components	XP49SM-R	Carbon fiber rear wheel	Purchased	EA	\$0.00	\$0.00
Components	100241	chain link	Purchased	EA	\$0.00	\$75.27
Components	ADD ITEM	choose extra item	Config Option	EA	\$0.00	\$0.00
Components	NNNN1092	Housing brake cable 5mm dia	Purchased	LFT	\$0.00	\$0.21
Components	100272	Inspected item	Purchased	EA	\$3.00	\$1.95
Components	100332	InspectSerial	Purchased		\$3.00	\$0.00

## Includes:

- Inventory
- Reference Vendor pn to Items
- Bill of Materials
- Labor Tasks (Routings)
- Lot Control
- Serial Control
- MO's (Work Orders)
- Vendor RFQ's
- Purchase Orders
- Accounts Payable
- Make-From Orders
- Physical Inventory Counts
- Non-Linear Scheduling
- Independent Labor or OH rates
- Material Requirements Planning
- Quotations
- Sales Orders
- Multi-tiered pricing
- Quick AR Invoice
- Labor Timecard entry
- Multiple Warehouse
- Issuing or Back-flush Material
- Average or Standard cost
- Accounts Receivable
- Multiple Ship-to's per customer
- Rollup of Standard cost
- Payroll with 6 user deductions
- Editable Tax tables
- General Ledger
- Checkbook reconciliation
- Financial reporting
- User-defined "types"
- Document Attaching
- Historical Notes
- Pop-up Reminders
- Email and Web-site Links
- Report Explorer
- Customizable Forms

**Manage** production and customer orders in one system. Buy parts with MRP or Re-Order point logic. Connect purchase receipts to AP invoices. Build items with detailed BOM's and Labor Instructions. Create quotes to customers. Track open orders, back orders, and invoices. Open screens for inventory and customers at the same time. Right-click to quickly reference historical information for purchases or general ledger activity. All these activities pass data to the GL system from the AP, AR and Payroll automatically via Journal Vouchers.

**Organize** your spreadsheets, letters, and drawings. You can attach files to Items, Orders, Customers, or Vendors. The documents are copied to a centralized file system that is accessible anywhere on your network. "Historical Notes" is an open ended tool that can be used for multiple purposes. Consider recording engineering change request on notes attached to a specific Item. Record a phone conversation with a vendor and connect it to a specific purchase order. Each user can review all their tasks in one list, no matter what it is attached to.

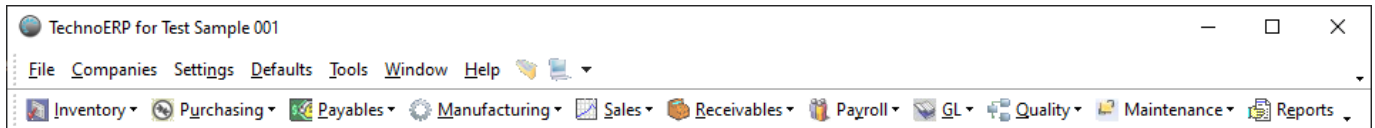
**Report** what is happening. A sample of what is included; quotes, bills-of-material, packing slips, bills of lading, invoices, purchase orders, sales analysis and financials. The reports are made with Crystal Reports which allows modification and customization.

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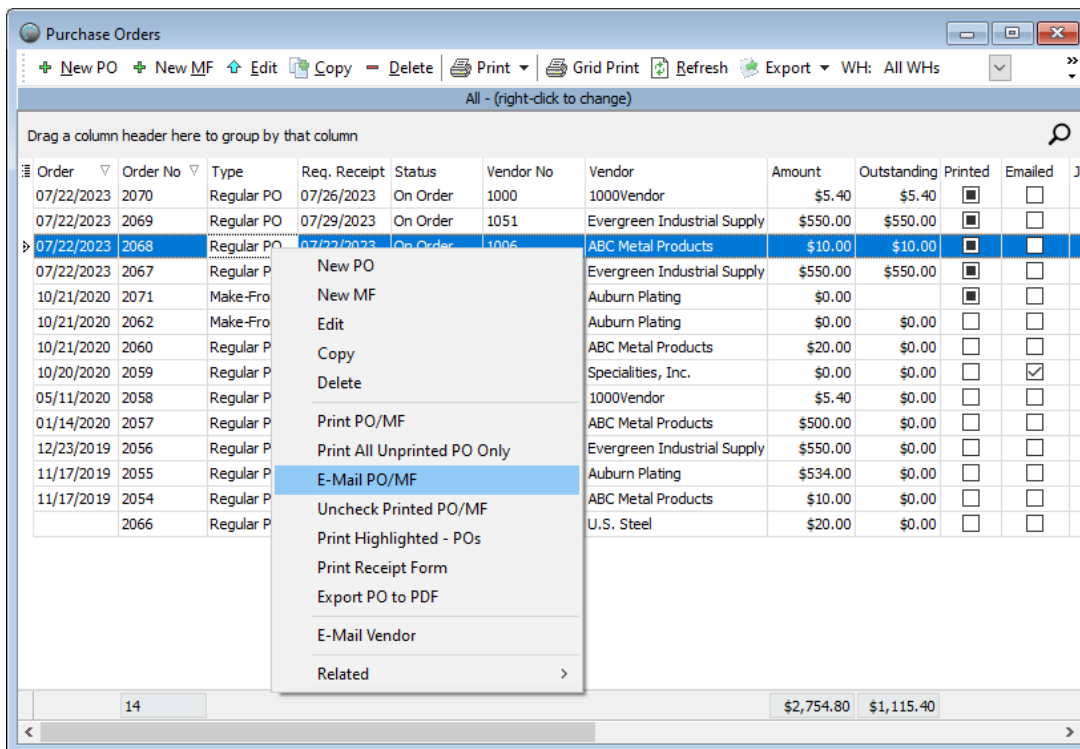
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## User Interface and Navigation

**Simplified Menus** - One screen showing all the modules. Organized in order to connect the logic of use. Many functions are found with right-clicking.

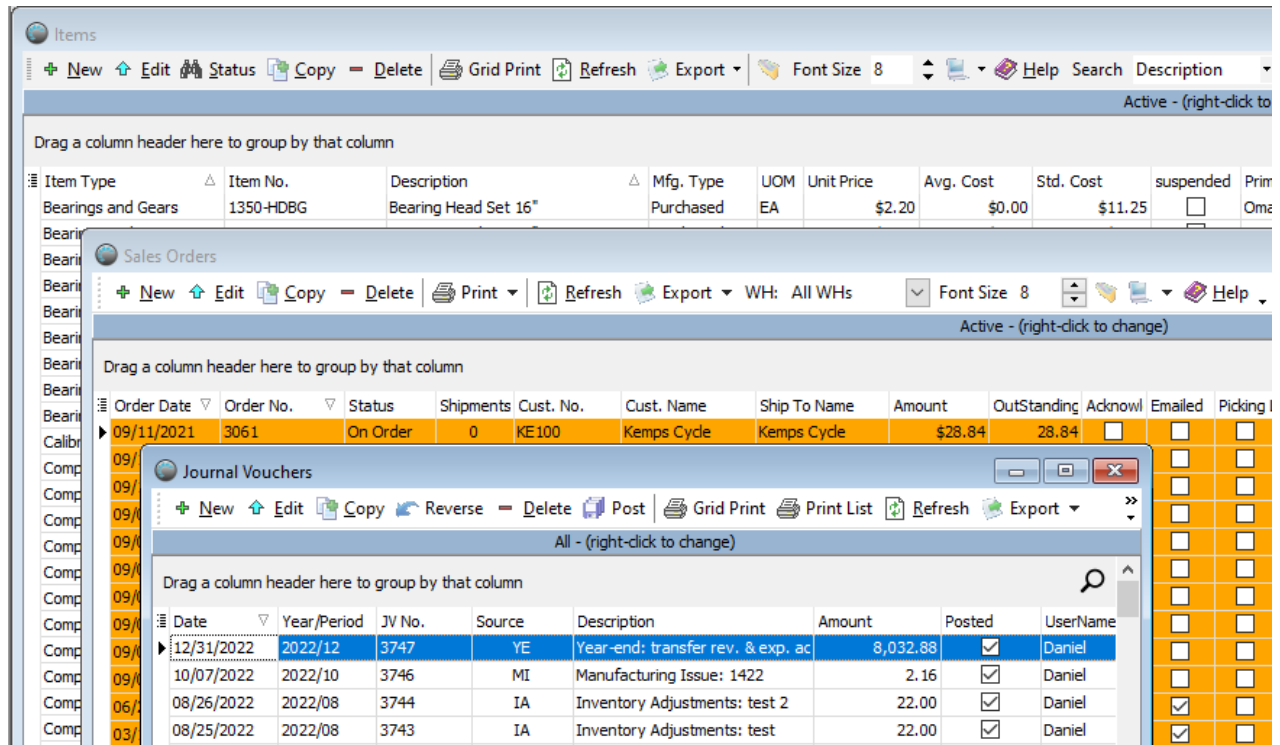


**Emailing forms** - Advanced setup allows single right-click functionality. In the vendor, assign a primary contact with an email address and the PO will be sent from your email to that contact. For example, just select a purchase order from the list, and right-click on "email".

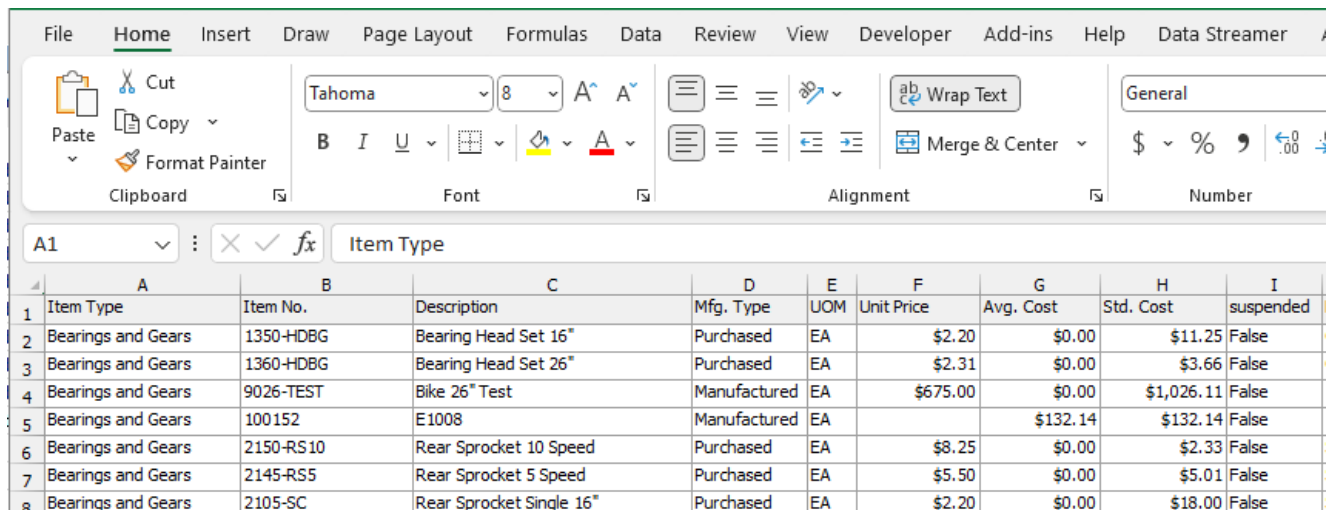


**Right-click for more options** - The emailing of forms is one example of the "Right-click" menu. Once something is selected the "Right-click" menu allows jumping to transactional history, cross-reference, additional functions and printing options. Also you can view inventory transactions, look up vendors or manufacturers, create a PO, and create MO from Sales orders.

**Consistent List screens** - Most functions open to a list screen. List of PO, Reminders, and GL accounts. All these windows share common buttons, layout, and method of opening and closing. The ability to move columns, searching, grouping and filtering is the same. You may drag a column to where you want and it will be back to normal the next time you open the window. Start typing in the "white" box of the highlighted row and you will find the information you want. Group the list by dragging a column to the gray area above the headings. Sort by one or more columns by clicking the gray column heading. Hold the shift key and click the gray column's headings for multiple column sorting. Click on the black triangle on the column heading for filtering options which include wildcard characters.



**Exporting Lists** - Click on either the "In Excel" or the "In a browser" buttons and in a few seconds the program has opened MS excel and displaying your list of information. This allows all kinds of uses where you need to get information out of **TechnoERP** into another program to further manipulate the data.



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Item Type	Item No.	Description	Mfg. Type	UOM	Unit Price	Avg. Cost	Std. Cost
Bearings and Gears	1350-HDBG	Bearing Head Set 16"	Purchased	EA	\$2.20	\$0.00	\$11.25
Bearings and Gears	1360-HDBG	Bearing Head Set 26"	Purchased	EA	\$2.31	\$0.00	\$3.66
Bearings and Gears	9026-TEST	Bike 26" Test	Manufactured	EA	\$675.00	\$0.00	\$1,026.11
Bearings and Gears	100152	E1008	Manufactured	EA		\$132.14	\$132.14
Bearings and Gears	2150-RS10	Rear Sprocket 10 Speed	Purchased	EA	\$8.25	\$0.00	\$2.33

**Multiple windows** - Have multiple windows open at the same time. Bounce back and forth using the menu bar listing the open windows. It is not necessary to close one screen to open another.

The screenshot displays the TechnoERP application interface for 'Test Sample 001'. The main menu includes File, Companies, Settings, Defaults, Tools, Window, and Help. The application is divided into four overlapping windows:

- Purchasing Inventory Receipts:** Shows a table with columns: Rcpt No., Year/Period, Date, PO No., Vendor No., Type, and Vendor. Data includes receipts for 2020/10 and 2020/09.
- Vendors:** Shows a table with columns: No., VendorName, and Type. Data includes vendors like 1000Vendor, ABC Metal Products, and Auburn Plating.
- Purchase Orders:** Shows a table with columns: Order, Order No., Type, Req. Receipt, Status, and Vendor No. Data includes orders from 2023 and 2020.
- Items:** Shows a table with columns: Item Type, Item No., and Description. Data includes various bearing and gear items like 1350-HDBG and 2150-RS10.

The taskbar at the bottom shows the company name 'Company: Test Sample 001' and the file path 'C:\TechnoResources\company-000'.

**Mouse movement** - Use your mouse to select which field to enter information or Tab/Enter to the next box in the program's default order. Utilize the mouse, keyboard or both to navigate the program.

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# Features: TechnoERP Inventory and Accounting

## Inventory

Item: 0096407

General Pricing Drawings Costs Materials Tasks MRP Notes GL Accounts Attributes Bins Insp

Item No.: 0096407 Next Model No.: 854B

Description: Cap- Spherical Red 854.0242 73

Drawing No: DX-CAP-RED-854-0242 Rev: B Barcode: 0096407

Item Type: Fasteners  Suspended Status: Normal

Mfg. Type: Purchased  Sellable?

User Defined: EAC-1  Backorderable?  Is Inventory (determined by type)

Unit Weight: 2.6  Taxable on Sale?  Skip Labels

Count Cycle: Quarterly  Commissionable?  Source Inspect?  Auto Switch to Phantom?

Stock UOM: EA  Serial Control?  Force Characteristic

Buy UOM: EA Buy Conv: 1  Lot Control?  Certs Required

Sell UOM: EA Sell Conv: 1 Primary Cust:

Unit Area:  Program:

Unit Volume:  Project:

Notes Status Where Used Lookup Change Log Save OK Cancel (x)

Inventory items are used in the Purchase orders, Manufacturing orders, and Sales orders in addition to the Inventory module itself. This module includes the Physical count, Inventory Transfer between multiple warehouses, Adjustment, and Transaction History. You can organize inventory by number, type, categories, and manufactured/purchased. Items are tracked internal to the program with ID thus allowing the renumbering of items at any time without losing historical information.

## Bill of Materials

Item: 9026-TR

General Pricing Drawings Costs **Materials** Tasks MRP Notes GL Accounts Attributes Bins

Per Batch? Qty: 50 BOM Notes: main assembly requires the following t... (CSV File With Path) Import From CSV

Drag a column header here to group by that column

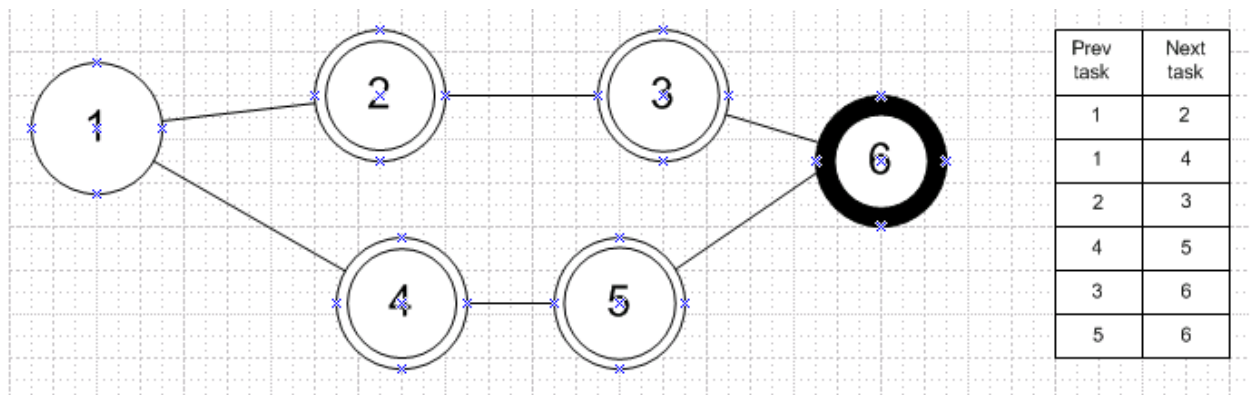
Line	Item No. (search)	Description	Qty.	UOM	Waste %	Material Ref.	Mfg Type	ItemTypeName	Effect Date	Exp
1	1026-FR	Frame 26" Touring	1.000000	EA		a	Manufactured	Finished Goods		
2	1326-FK	Fork 26"	1.000000	EA		a	Manufactured	Sub Assembly		
3	1360-HDBG	Bearing Head Set 26"	1.000000	EA		a	Purchased	Bearings and Gears		
4	1526-KSA	Kick Stand 26"	1.000000	EA		a	Purchased	Metal Parts and Ass		
5	2150-RS10	Rear Sprocket 10 Speec	1.000000	EA		a	Purchased	Bearings and Gears		
6	3126-FW	Wheel 26" Front	1.000000	EA		a	Manufactured	Sub Assembly		
7	2226-CH	Chain 26"	1.000000	EA		a	Purchased	Metal Parts and Ass		
8	3226-RW	Wheel 26" Rear	1.000000	EA		a	Make-From	Sub Assembly		
9	100244	Sub 1	3.000000	EA		a	Phantom	Plastic Assessories		

11.000000

Notes Status Where Used Lookup Change Log Save OK Cancel (x)

Connect Items needed to produce manufactured or outsourced assemblies. Define the "recipe" of what is needed. Specify any reference information per item. Define a waste percentage used in the assembly process. Use the "Effective" dates to show historical changes to the bill of material.

## Labor Tasks (Routing)



Create list of steps that define the operations required to manufacture the product. These steps are based on "Resources" of labor. The Resources can define a machine or a group of employees. The tasks can be done in a non-linear order, as pictured above, or in a straight order.

## Tracking Serials and Lots

Item	Description	Reference No	Start Qty	Qty On Hand	Expire Date	Warehouse	TypeName	UnitCost
▶ 100372-1026-FR	Std Frame 26" Touring	WQ123	1	1		Our Warehouse	STANDARD COST	\$211.42
100372-1026-FR	Std Frame 26" Touring	WQ124	1	1		Our Warehouse	STANDARD COST	
1316-FK	Fork 16"	1234	1	0		Our Warehouse	Sub Assembly	\$22.00
1316-FK	Fork 16"	123456	1	0		Our Warehouse	Sub Assembly	\$22.00
1316-FK	Fork 16"	123457	1	0		Our Warehouse	Sub Assembly	\$22.00
1316-FK	Fork 16"	123458	1	1		Our Warehouse	Sub Assembly	\$22.00
1316-FK	Fork 16"	123459	1	1		Our Warehouse	Sub Assembly	\$22.00
1316-FK	Fork 16"	123460	1	1		Our Warehouse	Sub Assembly	\$22.00
1316-FK	Fork 16"	1235	1	0		Our Warehouse	Sub Assembly	\$22.00
1316-FK	Fork 16"	1236	1	0		Our Warehouse	Sub Assembly	\$22.00
1316-FK	Fork 16"	1237	1	0		Our Warehouse	Sub Assembly	\$22.00
1316-FK	Fork 16"	1238	1	0		Our Warehouse	Sub Assembly	\$22.00
1316-FK	Fork 16"	1239	1	0		Our Warehouse	Sub Assembly	\$22.00
1316-FK	Fork 16"	1240	1	0		Our Warehouse	Sub Assembly	\$22.00
				23.00				

Serial and Lot Control allow editing of what is existing (password controlled) as you see in the above screen. Once the Item is set to Serial or Lot Control every transaction is prompted with entry/selection screen. For example, when completing a MO (Manufacturing Work Order) a screen requests the numbers of the product just completed. If you do not have the numbers at that moment the system allows you to enter or edit them later. You will not be able to "Post" the MO receipt till that information is complete. Once you have the tracking number complete you may return to that screen to complete the information. The goal is to have flexibility while still retaining integrity of data.

Shipment: 3009-2

Order No.: 3009 PO: Printed  From WH: Our Warehouse

Customer: KE100 Kemps Cycle Ship Ref: 3009-2

1323 S Siede Road, Mukiteo, Wa, 89U7,

Ship-To: Kemps Cycle Tax Grp: \$0.00

Kemps Cycle, 1323 S Siede Road, Mukiteo, Wa, 89U7, Freight: Prepaid & Charge \$0.00

Ship Date: 07/23/2023

Carrier: Auto Freight

Description:

Line	Ordered	Remaining	Shipped
I 001	20	0	

Serial Tracking: Order = 3009, Line = 001, Item No. = 1316-FK

Quantity	Reference No. (ID)	Date Expire	Note
1	ReferenceNo	Qty...	Warehous...
	123458	1	Our Warehouse
	123459	1	Our Warehouse
	123460	1	Our Warehouse
	1245	1	Our Warehouse
	1246	1	Our Warehouse
	1248	1	Our Warehouse
	1249	1	Our Warehouse
	1250	1	Our Warehouse

1.00

CAUTION: All changes will be stored.  
To discard changes you must cancel the current transaction . OK

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## Purchasing

Purchase Order 2067

Details | Comments | Approval | Deposit | Vendor Attributes | Revision | Documents | Data Log

Order No.: 2067 Printed  Status: On Order  Received Vendor Consignment

Vendor: 1051 Evergreen Industrial Supply Amount: 670.00

Ph: US Dollars

Contact: Alt. Contact: Confirmed:

Warehouse: Our Warehouse  Override Ship to Address Quote:

Entered by: Our Warehouse Order: 07/22/2023

Carrier: LTL 4823 Gedney View Lane Due: 07/29/2023

Carrier No: Job:

Freight: Prepaid & Charge Ref:

Terms: 1% 20, NET 30 DAYS USA SO:

Line	Quantity	Item (Search)	GL Dept	Description	UOM	Unit Cost	Amount	Qty Received	Qty on B/O	Completed	Req. Due
001	25	1316-FK	100	Fork 16"	EA	22	\$550.00	0.000000	0	<input type="checkbox"/>	07/29/2023
002	10	0080381	300	SetSc- 4.0x6.0 SLTD FL	EA	12	\$120.00	0.000000	0	<input type="checkbox"/>	07/29/2023
							35.00				

Notes Requested by: Bob Baxter 07/23/2023

The purchasing module allows you to manage inventory demands and track open purchase orders. This module includes the Orders and Receipts. You can create purchase orders with the status "Worksheet" for a RFQ and just change the status when you ready to place the order. The program offers two types of PO's; Standard parts ordering and Make-From for item made/assembled at a supplier with material you provide. You also can create PO's from Material Requirements Planning (MRP).



## Manufacturing

The screenshot displays three overlapping windows from the Manufacturing module:

- Inventory Forecasts:** Shows a table with columns: Item No., Item Description, Requested Qty, UOM, Requested Date, Include?, and Notes. The row for Item No. 100183-001 (Custom 3 wheel ind) is highlighted.
- MO Shortage List (Filtered):** Shows a table with columns: MfgOrderN and MfgItemNo. The row for MfgOrderN MO10579 and MfgItemNo 100183-001 is highlighted.
- Manufacturing Orders:** Shows a table with columns: Order No., Start Date, Requested, Ordered, Recvd, Status, Printed, Item No., and Desc. The row for Order No. MO10579 is highlighted.

The manufacturing module contains Forecasts, Orders, Receipts, MRP - Material Requirements Planning, Scheduling, and Resources. Bill of materials and operations are copied from the inventory to the MO and thereby create allocated demand for both material and scheduled resources. Back-flushing of materials occurs when a Receipt is entered. The MRP can calculate the material needed and when. This time-phased demand information is presented in a grid then you "right-click" on the create "purchase" or "manufacturing" orders.

## Contact Management

The screenshot shows the Sales Contacts window with a table of contact information:

Last	First	Cust. No.	Cust. Name	Phone	Ext.	City	State/Prov	Zip	Prospect	Type Name	User
Barnes	Larry	1009	Husky Inc.	915-438-7220		Buford	TX	45693	<input type="checkbox"/>	Wholesale	
Boyington	Bobbie	1003	Discount Bikes	360-345-8967		Bellingham	WA	98035	<input type="checkbox"/>	Wholesale	
Fattire	Patty	1018	Gregg's Cycles	(206)523-1822	3456			98115	<input type="checkbox"/>	Wholesale	Green
Grossbrink	Johannes	1015	NorthEast Recumbents	(800)976-7494		Fairfield	NJ	07004	<input type="checkbox"/>	Wholesale	12345
Johnson	James	1003	Discount Bikes	555-444-3333		Bellingham	WA	98035	<input type="checkbox"/>	Wholesale	
Jones	Earl	1035	new customer						<input checked="" type="checkbox"/>		
Mail	G	1006	Billy's Bikes			Blackfoot	ID	86734	<input type="checkbox"/>	Retail	
McDaniels	Jeff	1038	Best Bikes						<input type="checkbox"/>	Retail	
Sherwood	Karen	1006	Billy's Bikes			Blackfoot	ID	86734	<input type="checkbox"/>	Retail	
Squeaks	Pip	1006	Billy's Bikes			Blackfoot	ID	86734	<input type="checkbox"/>	Retail	
test	test	1008	House of Bicycles			Vernon	B.C.	34HW12D	<input type="checkbox"/>	Wholesale	
Tinnitus	Tim	1002	Bikes R Us			Lynnwood	WA	98217	<input type="checkbox"/>	Retail	

Sale Contacts is a combined list of "Customer" and "Prospect" contacts. The list shows the contact's name first, which allows the user to update information on those prospects, not just by company. Fields are available to differentiate between "Prospects" and "Customers", plus additional grouping and organizing fields for prospects. The "Status" field allows the user to define in your own words how far along that prospect

is in turning them into a customer. You could define whether they have a "strong", "chance" or "weak" potential. The "Contacts" list grid was added to display all contacts in a single list even if there are more than one contact per prospect/customer. We leverage the abilities in **TechnoERP** to attach documents and create "Historical" notes for each contact.

## Payables

The screenshot shows the 'AP Invoices' window in TechnoERP. The interface includes a toolbar with options like 'New for PO', 'New for Other', 'Recurring', 'Edit', 'Copy', 'Delete', and 'Post'. Below the toolbar is a header bar with 'All - (right-click to change)'. A message says 'Drag a column header here to group by that column'. The main area is a table of invoices. The table has columns: Inv No., Vendor No., Vendor Name, PO No., Amount, Owing, Description, Posted, Voided, Appro, ApproveBy, and Due. The table shows several rows of invoices, with one row (Inv No. 21) highlighted in blue. At the bottom of the table, there are summary boxes for '3474.00' and '3474.00'. Below the table is a footer bar with settings for 'Display Color: On', 'Approval Needed' (orange), 'Voided' (grey), and 'Queue for Coding' (blue).

Inv No.	Vendor No.	Vendor Name	PO No.	Amount	Owing	Description	Posted	Voided	Appro	ApproveBy	Due
547	1001	Blue Cross		116.00	116.00	Overpass	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bob Baxter	08/22/2023
21	1028	Auburn Plating	2055	336.00	336.00		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		08/07/2023
9855	1006	ABC Metal Produc	2054	1.00	1.00	ABC - Extra Pie	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		08/22/2023
511256	1028	Auburn Plating		84.00	84.00	Yard Project	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Susan Hall	08/07/2023
384	1013	U.S. Steel		1,610.00	1,610.00	Extra Benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		08/22/2023
384	1004	Aflac		508.00	508.00	Extra Benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bob Baxter	08/22/2023
565	1000	1000Vendor		140.00	140.00	Overpass	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Susan Hall	07/23/2023
565	1007	Bill's Office Supplie		135.00	135.00	Designate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Claire	07/14/2023
5511	1028	Auburn Plating	2055	534.00	534.00		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		02/15/2020
11	1006	ABC Metal Produc	2054	10.00	10.00	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		12/17/2019
				3474.00	3474.00						

Within the Payables module you can access vendors, enter invoices, and pay bills. An extra feature ties purchase receipts to billing thereby linking PO's to Payables. Non-inventory bills can also be entered by charging them directly to general ledger accounts.

## Sales Orders

This module allows you to manage the order fulfillment process to your customers. The Sales module contains Deposits, Orders, Shipments, and Sales person information. A grid style report of history is also available. When using Orders you may start with the status of "Quote" and quickly change the status to an open order. Shipments change the outstanding quantity on order and pass the information to Receivables.

## Receivables

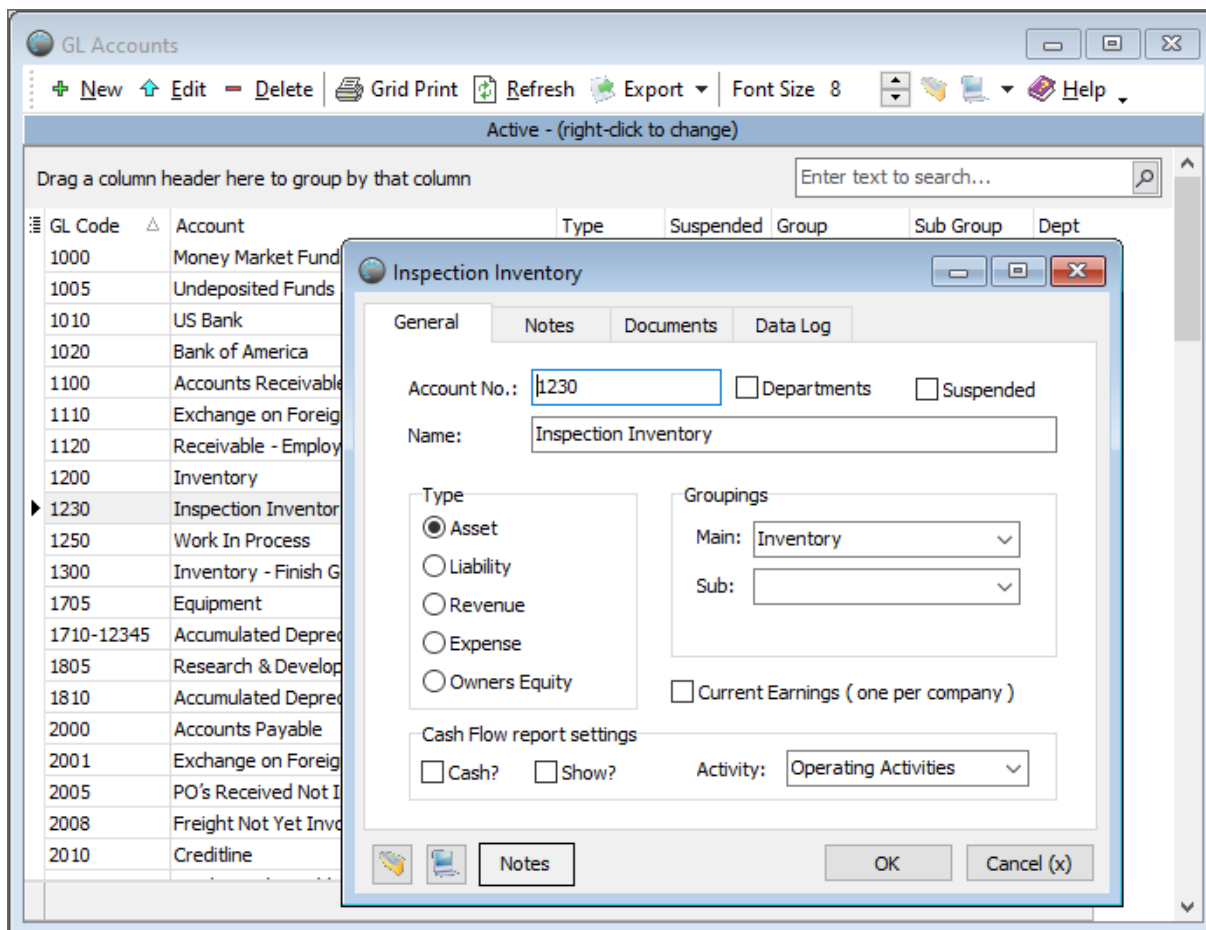
The Accounts Receivable system tracks customer invoices and payments. Sales taxes are user defined and calculated automatically during the invoice process. Invoices print on plain paper to facilitate faxing and to avoid the expense of pre-printed forms. Adjustments, discounts, and write-offs can be entered when

entering the payment info. Invoices are not purged when fully paid, but are instead retained for sales analysis reporting. Data is passed to the GL system automatically via Journal Vouchers with revenues converted from foreign currency to domestic currency. You can trade globally in multiple currencies while your books remain in domestic currency. GL accounts for AR, discounts, and gain/loss on foreign exchange are retrieved from the currencies table.

## Payroll

From timesheets to W2 printing, this module covers your needs. We offer a time clock labor collection option that can generate the timesheets, a barcode task scanning option, or timesheets can be filled out by the personnel themselves and submitted within the system for "approval". The employees pay check can be from a timesheet or direct entry. Federal, State and local tables are editable for the end user's updating. General ledger transactions are created with the posting of the payroll.

## General Ledger



The General Ledger system tracks budget and actual financial data in order to produce financial statements such as an Income Statement and Balance Sheet, the Trial Balance Report, General Ledger Report, GL Totals Screen, GL History Screen, and the Bank Book.

Data is passed to the GL system from the AP and AR automatically via Journal Vouchers with expenses and revenues converted from foreign currency to domestic currency. You can trade globally in multiple currencies while your books remain in domestic currency. Data is keyed directly to the GL system via Journal Vouchers to record:

- Initial entry of opening balances
- Depreciation
- Corrections and adjustments to previous GL transactions

Year-end closing entries are generated by the system.

## Reminders / Action Items

Internal Notes for [NR]: all

Active - (right-click to change)

Drag a column header here to group by that column

Enter text to search...

Created	Type	Priority	Complete	Cancel	Subject	Note	Date Due	Time Due	User	Link	Link Desc.	Last Mod.
07/23/2023		5	<input type="checkbox"/>	<input type="checkbox"/>	475	<a href="#">a</a>	07/23/2023	15:00:00	Daniel	CU	Bikes R Us	07/23/2023
07/23/2023	ECO	5	<input type="checkbox"/>	<input type="checkbox"/>	456	<a href="#">A</a>	06/01/2023	15:00:00	Daniel	CU	Discount Bikes	07/23/2023
Reminder to call back												
07/23/2023	email	5	<input type="checkbox"/>	<input type="checkbox"/>	Call	<a href="#">a</a>	07/23/2023	15:00:00	Daniel	CU	Billy's Bikes	07/23/2023
05/01/2018	ECR	5	<input type="checkbox"/>	<input type="checkbox"/>	Other	<a href="#">a</a>			Claire	RI	10488	05/01/2018
06/05/2017	phone	5	<input type="checkbox"/>	<input type="checkbox"/>	Barnes	<a href="#">a</a>			cdr	C*	Larry Barnes of Hu	07/23/2023
05/26/2017	phone	5	<input type="checkbox"/>	<input type="checkbox"/>	call	<a href="#">a</a>			Claire	IT	0080381 (SetSc- 4	05/30/2018
05/26/2017	phone	5	<input type="checkbox"/>	<input type="checkbox"/>	call	<a href="#">a</a>	03/23/2023		Claire	IT	0080381 (SetSc- 4	07/23/2023
01/20/2016	Drawing C	5	<input type="checkbox"/>	<input type="checkbox"/>	Dwg	<a href="#">a</a>			cdr	IR	1026	07/23/2023
12/05/2015	email	5	<input type="checkbox"/>	<input type="checkbox"/>		<a href="#">A</a>	12/01/2023		cdr	IT	100219 (test)	07/23/2023
Don't forget to renew license by 12/05												
08/04/2015	email	5	<input type="checkbox"/>	<input type="checkbox"/>	Pricing	<a href="#">A</a>	07/03/2023		cdr	CU	Billy's Bikes	07/23/2023
Email Ricky about new pricing												

Reminders for Daniel

Drag a column header here to group by that column

Enter text to search...

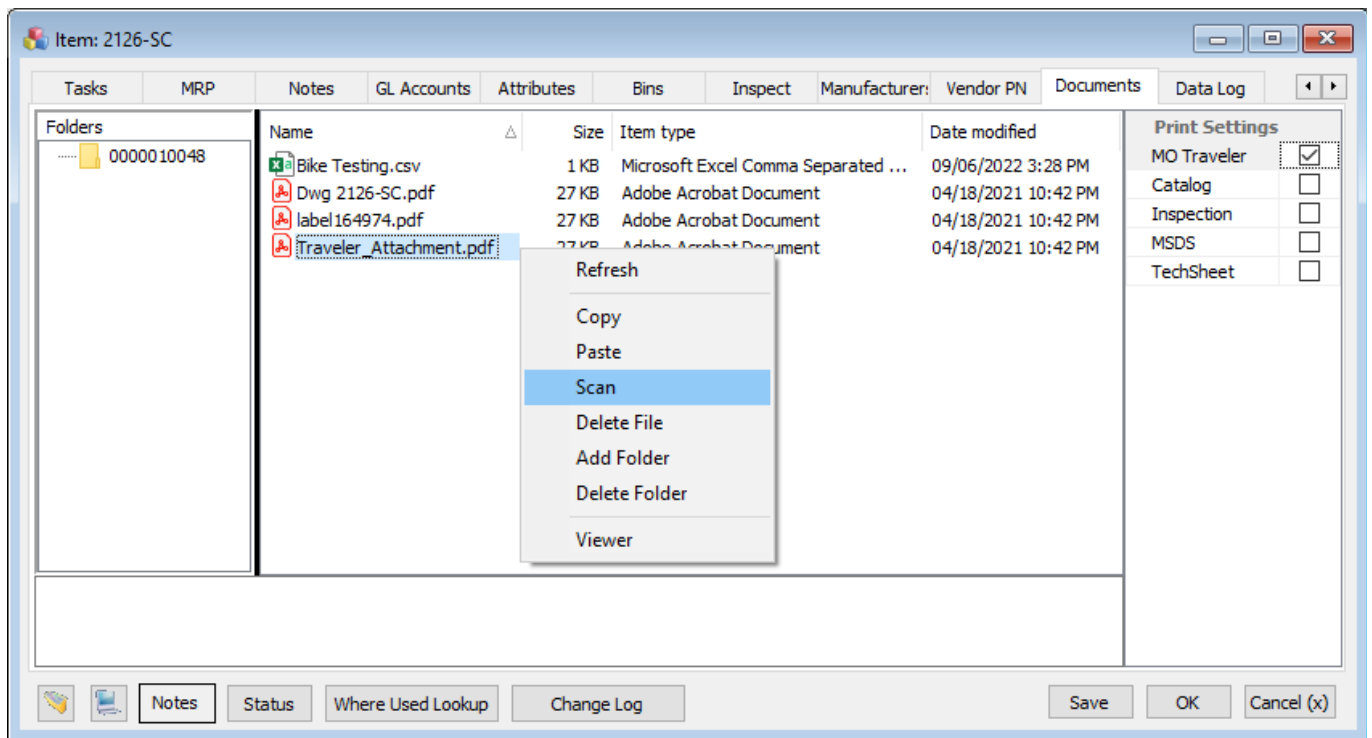
Created	Type	Priority	Complete	Cancel	Date Finished	Subject	Note	Date Due	Time Due	User	Link
07/23/2023	email	5	<input type="checkbox"/>	<input type="checkbox"/>		Call	<a href="#">a</a>	07/23/2023	15:00:00	Daniel	CU
07/23/2023	ECO	5	<input type="checkbox"/>	<input type="checkbox"/>		456	<a href="#">A</a>	06/01/2023	15:00:00	Daniel	CU
Reminder to call back											
07/23/2023	ECR	5	<input type="checkbox"/>	<input type="checkbox"/>		475	<a href="#">A</a>	07/23/2023	15:00:00	Daniel	CU
Don't forget to send updated pricing											

Move notes scattered around the office into the system. We offer the ability to connect these notes to Items, Customers, Vendors, Sales Orders and Purchase Orders. Use these Historical Notes for recording phone conversations, engineering change requests or follow-up reminders for sales prospects.

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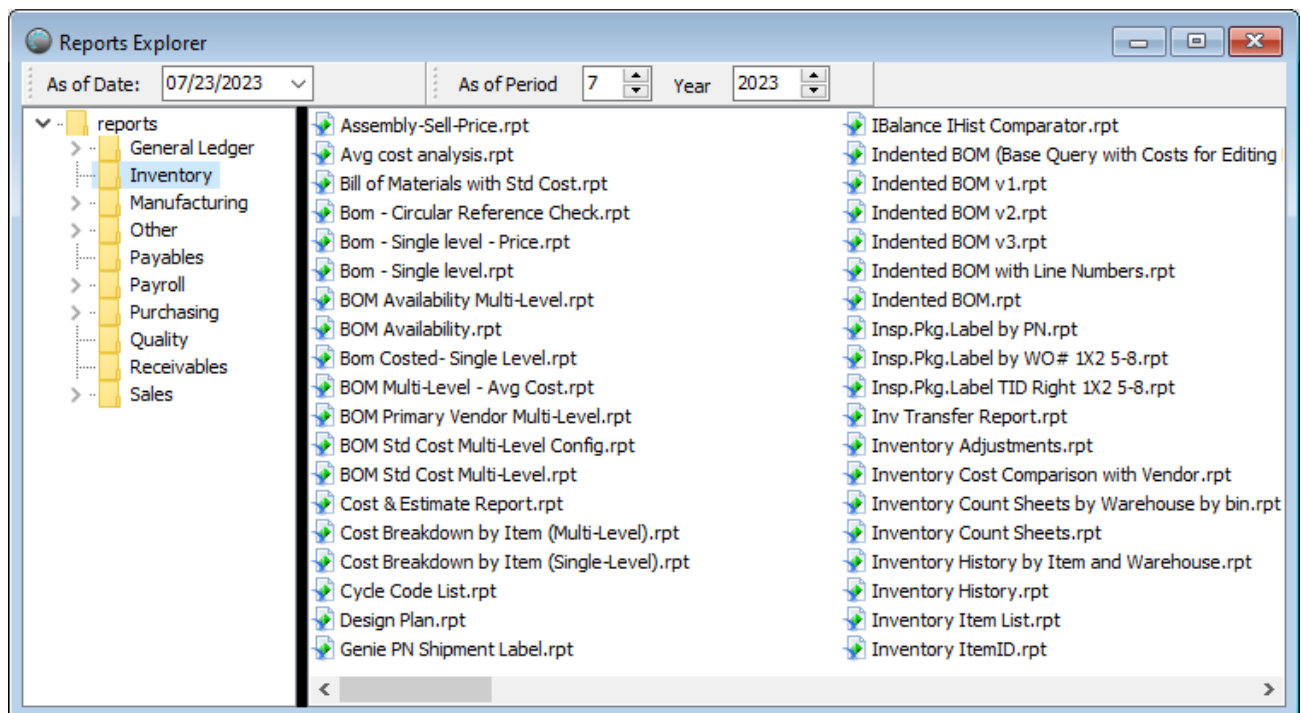
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## Document Management



You are able to simply cut and paste or scan a document directly into this window. Double-click on a listed document and the file will open if that program is associated with a program on that computer. Attach a file to customers, vendors, contacts, sales orders, purchase orders, items, and much more. The program automatically creates a folder structure on your server, so all can have the same access without any extra work or planning on your part. We also have a folder permission structure for shared docs, if necessary.

## Report Writer



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Most of our reports utilize *Crystal Reports* writer. This report window lets you organize all the system forms as well as the custom reports you generate. The security and password controls apply to this screen as well. Crystal reports pulls information from the data dictionary directly which allows you to delete and add fields of your choosing. Only one copy of crystal is required for the user/administrator to modify and create new reports. Other users can find these custom reports and need only to double-click on the reports to view and print them. Crystal allows the output to be in the form of screen, PDF, HTML, MS Excel and many others.

## Custom Charts, Graphs, and Queries

The screenshot displays the TechnoERP software interface. On the left, a window titled "Chart - Custom: Items by Type" shows a pie chart representing the distribution of items by type. The chart is divided into 15 segments, each corresponding to a category in the legend. The legend categories are: Bearings and Gears, Calibration Items, Components, Fasteners, Finished Goods, Flat Steel, Laser cut parts, Metal Parts and Assesories, Metal Tubing, NonInv, Plastic Assesories, Repair and Service, Rubber Tires and Tubes, STANDARD COST, and Sub Assembly. The chart is labeled "Quantity". Below the chart, the SQL query is displayed: `select TypeName, 1, Count(ItemID) Quantity from Item inner join ItemType on Item.ItemTypeID = ItemType.ItemTypeID`.

On the right, a window titled "Query - Custom: Inventory GL account Listing" shows a table of inventory data. The table has columns for ItemNo, ItemDescription, InventoryGL, SalesGL, COGSGL, and WIP\_GL. The data is as follows:

ItemNo	ItemDescription	InventoryGL	SalesGL	COGSGL	WIP_GL
1016-FR	Frame 16" BMX	1200	-4000	5010	1250
1026-FR	Frame 26" Touring	1200	4000	5010	1250
1102-HB	Handle Bar 2" Rise	1200	-4000	5010	1250
8075-TBG	Tubing Steel 3/4" OD	1200	4000	5010	1250
8125-TBG	Tubing Steel 1-1/4" OD	1200	4000	5010	1250
8200-TBG	Tubing Steel 2" OD	1200	4000	5010	1250
8610-FLS	Flat Steel 1/4" X 2"	1200	4000	5010	1250
1150-HBGR	Handle Bar Grip	1200	4000	5010	1250
1205-ST	Handle Bar Stem Type A	1200	4000	5010	1250
1316-FK	Fork 16"	1200	4000	5010	1250
1350-HDBG	Bearing Head Set 16"	1200	4000	5010	1250
9016-BMX	Bike 16" BMX	1300	4000	5010	1250
1400-SP	Seat Post / Standard 6"	1200	4000	5010	1250
1450-CLSP	Seat Post Clamp 3/4"	1200	4000	5010	1250
1516-KSA	Kick Stand 16 inch	1200	4000	5010	1250
2000-CR	Crank 16"	1200	4000	5010	1250
2075-CR	Pedal Standard	1200	4000	5010	1250
2105-SC	Rear Sprocket Single 16"	1200	4000	5010	1250
2216-CH	Chain 16"	1200	4000	5010	1250
3000-SD	Seat Standard	1200	4000	5010	1250
3116-FW	Wheel 16" Front	1200	4000	5010	1250

Below the table, the SQL query is displayed: `select ItemNo, ItemDescription, IGL.GLAccount as InventoryGL, SGL.GLAccount as SalesGL, CGL.GLAccount as COGSGL, WGL.GLAccount as WIP_`

In addition to all the built-in reporting, **TechnoERP** also gives you the ability to create your own custom charts, graphs, and queries. You can add your own SQL, accept parameters, filtering, searching, and is export-friendly. Perhaps you need to query a list then export it for further analysis, or you need an exportable CSV format for upload into your bank's portal. TechnoERP is built in such a way that you can customize it to your business. **TechnoERP** puts the power in YOUR hands.