

38
40

(2) User Manual

Sales team

Powermen

☒ Leads

Team Leader: Email Alias:

Code:

Invoice Target: Accept Emails From:

Invoice Forecast:

Parent Team:

Reassign Escalated: ☐

Active: ☒

Team Members | Stages | Notes

Add

Team Members	Stages	Notes
Chen, Xun	X JIANG, Yongsheng	X Shah, Monank D.

First of all, We set up our sales team.

Name (☒ Is a Company?)

Javeri Capital 

Address

Phone

Mobile

Fax

Email

Website

Opportunities **Meetings** **Calls**

Quotations and Sales **Invoices**

Journal Items **Contracts**

Claims **Tasks**

Contacts **Internal Notes** **Sales & Purchases** **Payment Follow-up** **Accounting** **Warnings**

Create

1A Created Company

Open: Contacts ×

Name

Amit Javeri

Real Estate Investment ×
115 Mercer Street ×
Soho ×
Javeri Capital ×
Shah Group ×
Tags...

Job Position Managing Principal

Email amit@javericapital.com

Phone (646) 828-9021

Mobile

☐ Use Company Address

Address Type Contact

Address

592 Fifth Avenue

New York New York 10036

United States

Save
or Discard

2A Created individual that works for partner company created in 1A

Open: Contacts ×

Name

Monu Shah

Tags...

Job Position Investment Director

Email mshah@javericapital.com

Phone (646) 726-8832

Mobile

☐ Use Company Address

Address Type Contact

Address

592 Fifth Avenue

New York New York 10036

United States

Save
or Discard

3A Created second individual that works for partner company created in 1A

Name (☒ Is a Company?)

Javeri Capital 

Address

Website

Phone

Mobile

Fax

Email

Tags...

Contacts **Internal Notes** **Sales & Purchases** **Payment Follow-up** **Accounting** **Warnings**

Create

Amit Javeri
Managing Principal
amit@javericapital.com
Phone: (646) 828-9021

Monu Shah
Investment Director
mshah@javericapital.com
Phone: (646) 726-8832

4A Completed editing company and individuals for Javeri Capital

Edit

Name (☒ Is a Company?)

Javeri Capital 

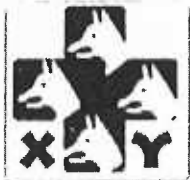
Tags...

5A Gave tags to Javeri Capital for easy searching options for internal users



Clear Bright & Famous LLC

Soho Real Estate Investment 20 Greene Street



Javeri Capital

Soho 115 Mercer Street Real Estate Investment Javeri Capital



115 Mercer Retail Owner LLC

Soho 115 Mercer Street Real Estate Investment Javeri Capital

We created 3 main customers and some other customers.

Customers

Tag soho x

Create



115 Mercer Retail Owner LLC

115 Mercer Street Javeri Capital

Real Estate Investment Soho

1 Opportunities 1 Meetings 4 Sales
Soho, United States
115MERCER@NYIT.EDU



115 Mercer Retail Owner LLC,
Javeri Capital

115 Mercer Street Javeri Capital

Real Estate Investment Soho

Managing Entity at 115 Mercer Retail
Owner LLC
New York, United States
info@javericapital.com



BLEX LTD

Soho

MANHATTAN, United States
BLEX@NYIT.EDU



CLEX LTD

Soho

MANHATTAN, United States
CLEX@NYIT.EDU



Clear Bright & Famous LLC

20 Greene Street Real Estate Investment

Soho

Soho, United States



DLEX LTD

Soho

MANHATTAN, United States
DLEX@NYIT.EDU



Javeri Capital

115 Mercer Street Javeri Capital

Real Estate Investment Soho

1 Opportunities 1 Meetings 4 Sales
New York, United States
JAVERI@NYIT.EDU



Javeri Capital, Amit Javeri

115 Mercer Street Javeri Capital

Real Estate Investment Shah Group

Soho

Managing Principal at Javeri Capital
New York, United States
amit@javericapital.com



Shah Group LLC

Real Estate Investment Soho

Manhattan, United States



Shah Group LLC, Monank Shah

20 Greene Street Real Estate Investment

Soho

Managing Principal at Shah Group

These are all of customers we'd created including companies and persons.

We search them from the tag "soho".

Leads / Real Estate Furniture

Save or Discard 3 / 10

Convert to Opportunity

New Opportunity

Subject: **Javeri Capital Real Estate Furniture** [Schedule/Log Call](#)

Company Name	Javeri Capital	Contact Name	
Customer	Javeri Capital	Title	
Address	592 Fifth Avenue	Email	
	New York New York	Function	
	10036	Phone	(212) 898-1010
	United States	Mobile	
		Fax	
Salesperson	Shah, Monank D.	Priority	Normal
Sales Team	Powermen Escalate	Categories	

Internal Notes Extra Info

Looking to purchase furniture for their new investment property.

Input new lead description and customer/company information

Leads / Real Estate Furniture

Edit Create More

Convert to Opportunity New Opportunity

Real Estate Furniture [Schedule/Log Call](#)

Company Name	Javeri Capital	Contact Name	
Customer	Javeri Capital	Email	
Address	592 Fifth Avenue	Function	
	New York New York	Phone	(212) 898-1010
	10036	Mobile	
	United States	Fax	
Salesperson	Shah, Monank D.	Priority	Normal
Sales Team	Powermen Escalate	Categories	

Internal Notes Extra Info

Looking to purchase furniture for their new investment property.

Send a message or Log a note

Following

Opportunity created

- Expected Revenue:
- Partner: Javeri Capital
- Salesperson: Shah, Monank D.
- Sales Team: read more

☐ Opportunity Won
☐ Opportunity Lost
☒ Discussions
☐ Stage Changed
☐ Lead to Opportunity

After saving lead description and customer/company information

Convert to opportunity

Conversion Action

Convert to opportunity

Assign opportunities to

Salesperson

Shah, Monank D.

Sales Team

Powermen

Opportunities

Related Customer

Link to an existing customer

Customer

Javeri Capital

Create Opportunity

or Cancel

Conversion process from lead to opportunity

Leads / Javeri Capital Real Estate Furniture

Edit

Create

More

Convert to Quotation

New

Qualification

Proposition

Negotiation

Won

Lost

Javeri Capital Real Estate Furniture

\$ 0.00 at 0%

Customer

Javeri Capital

Email

Phone

(212) 898-1010

Salesperson

Shah, Monank D.

Sales Team

Powermen

Escalate

Next Action

12/06/2013

Expected Closing

Priority

Normal

Categories

Internal Notes

Lead

Looking to purchase furniture for their new Investment property.

Send a message

or

Log a note

Partner set to Javeri Capital.

Shah, Monank D. updated document • less than a minute ago • like

Opportunity created

Expected Revenue:

Partner: Javeri Capital

Salesperson: Shah, Monank D.

Following

☐ Opportunity Won

☐ Opportunity Lost

☒ Discussions

☐ Stage Changed

☐ Lead to Opportunity

☐ Lead Created

After conversion to opportunity

Schedule/Log Call

Action

Log a call

Partner

Javeri Capital

Call summary

Javeri Capital Real Estate Furniture

Phone

(212) 898-1010

Discussed different options for furniture and pricing. Schedule meeting for lunch.

Log call

or Cancel

If phone call is made, log conversation for other employees

Send a message

or

Log a note



Logged a call for 2013-12-06 21:19:36. Discussed different options for furniture and pricing. Schedule meeting for lunch. ... read more

Shah, Monank D. updated document • less than a minute ago • like




Logged call appears at the bottom for other individuals/memo to self

Scheduled Calls					
Create or Import		Responsible Chen, Xun x		1-3 of 3  	
☐ Date	Call Summary	Contact	Phone	Responsible	Status
☐ 12/07/2013 01:54:19	Deals with Alex Group	Alex Group, Alex	 6463612754	Chen, Xun	Confirmed
☐ 12/07/2013 01:53:38	Deals of Clear Bright & Famous LLC	Clear Bright & Famous LLC, John Jacob	 6463612457	Chen, Xun	Confirmed
☐ 12/07/2013 01:52:26	Deals of 115 Mercer Retail Owner LLC	115 Mercer Retail Owner LLC, Javeri Capital		Chen, Xun	Confirmed

This is the scheduled calls we had set.

Create: Meetings

Meeting Subject

Javeri Capital Furniture Purchase

Attendees

Javeri Capital

Meeting DetailsOptionsInvitations

Starting at

12/09/2013 12:00

Tags

Duration

01:00

hours

All Day?

Location

Description

Lunch meeting to discuss different furniture availability and pricing.

Save or Discard

If meeting is scheduled, input meeting parameters.

December 2013							Day	Week	Month
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday			
01	02	03	04	05	06	07			
			08:00 Meeting to exp	08:00 New event, Chi	Alex Deals, Chen, Yun	08:00 Product Inform			
					09:00 Product inform				
					15:00 New deal, Huan				
08	09	10	11	12	13	14			
08:00 Sales Informati	12:00 Javeri Capital F								
15	16	17	18	19	20	21			

After scheduling appointment, it now appears on the calendar.

Opportunities

Create or Add a new column

New

9 +

Expected Revenues: 1271000

**115 Mercer Facade
Renovation Materials -
1000000.00 USD**
115 Mercer Retail Owner LLC
12/06/2013 :



**Clear Bright & Famous
Interior Lighting - 10000.00
USD**
Clear Bright & Famous LLC, David
Bow
12/06/2013 :



**Javeri Capital Real Estate
Furniture - 250000.00 USD**
Javeri Capital
12/06/2013 :



Qualification

3 +

Expected Revenues: 500

Sale product - 500.00 USD
costumic, sephora 6



Sales order
Pinnacle Management
Consultancy



Sales order
Home Design



We had created many opportunities, these three are created by us.

Quotation S0025

Customer Javeri Capital
592 Fifth Avenue
New York, NY 10036
United States

Date	12/06/2013
Customer Reference	
Pricelist	Public Pricelist (USD)

Invoice Address	Javeri Capital
Delivery Address	Javeri Capital

[illegible]

Maroln 1 00 00

Next you may go ahead and convert the opportunity to quotation.

Create: Order Lines

×

Draft

Confirmed

Done

Product

Sofas

▼

↗

Quantity

10

Unit(s)

↗

Quantity (UoS)

10.000

Unit(s)

▼

Unit Price

10000

Cost Price

2000

Discount (%)

10

%

Packaging

▼

Taxes

Tax 8.00%

▼

Analytic Distribution

▼

Delivery Lead Time

7.00

days

Procurement Method

from stock

▼

Weight

0.00

Allotment Partner

▼

Properties

▼

Description

Luxury Sofas, All Black leather with recliner

Save & Close

Save & New

or Discard

In the quotation, we input product parameters such as sale price, number of units etc.



Perfume

All products

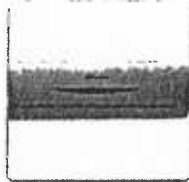
☒ Can be Sold ☒ Can be Purchased



Computers

Electronic Devices

☒ Can be Sold ☒ Can be Purchased



Air-conditioning

All products

☒ Can be Sold ☒ Can be Purchased

Before we create order line, we' d created 3 products we want to sell.

Products

Product alex sofa x

Create



[ALEX] Air-conditioning
1 Deliveries
Price: 1000.00
On hand: ~1035.000 Unit(s)
Forecasted: ~1036.000 Unit(s)



[ALEX] Computers
Price: 1000.00
On hand: ~615.000 Unit(s)
Forecasted: ~615.000 Unit(s)



[ALEX] Perfume
Price: 500.00
On hand: ~52.000 Unit(s)
Forecasted: ~52.000 Unit(s)



Sofas
3 Deliveries
Price: 1.00
On hand: ~10.000 Unit(s)
Forecasted: ~21.000 Unit(s)

These are all products we created and we search them from the tags.

Quotation after it is updated with product, pricing and quantity + sales tax

We sent email to our customers for quotation.



OpenWood
2930 Flood Ave
Redwood City, CA 94063
United States

Your Company Tagline

Phone:
Mail: info@openwood.com

Shipping address :
Javeri Capital
592 Fifth Avenue
New York, NY 10036
United States

Javeri Capital
592 Fifth Avenue
New York, NY 10036
United States

Tel. : (212) 898-1010

Invoice address :
Javeri Capital
592 Fifth Avenue
New York, NY 10036
United States

Order N° S0025

Your Reference	Date Ordered	Salesperson	Payment Term
	12/06/2013	Shah, Monarik D.	

Description	Tax	Quantity	Unit Price	Disc.(%)	Price
Luxury Sofas. All Black leather with recliner.	Tax 8.00%	10.000 Unit(s)	10000.00	10.00	\$ 90000.00
Net Total :					\$ 90000.00
Taxes :					\$ 7200.00
Total :					\$ 97200.00

Generated by OpenWood.com

Email: info@openwood.com | Website: openwood.com
Contact : Chen, Xun - Page: 1

After customer receipt our quotation, we signed the sales order. This is the sales order we printed from the website.

View Delivery Order Create Invoice Cancel Order

Draft Quotation Quotation Sent Sales Order Sale to Invoice

Sales Order S0025

Customer: Javeri Capital
592 Fifth Avenue
New York, NY 10036
United States

Date: 12/06/2013

Customer Reference: Public Pricelist (USD)

Invoice Address: Javeri Capital

Delivery Address: Javeri Capital

Order Lines	Other Information
Product	Description
Quantity	Unit of Measure
Taxes	Unit Price
Cost Price	Discount (%)
Subtotal	
Sofas	Luxury Sofas. All Black leather with recliner.
10.000	Unit(s)
Tax 8.00%	10000.00 2000.00 10.00 90000.00

Untaxed Amount : \$ 90000.00

Taxes : \$ 7200.00

Total : \$ 97200.00

Margin : \$ 70000.00

Delivery Method :

Sales Order is processed from original quotation if customer agrees

Draft Invoice

Customer: Javeri Capital
592 Fifth Avenue
New York, NY 10036
United States

Invoice Date: Sales Journal (USD)

Journal: 120010 Account Receivable

Fiscal Position :

Invoice Lines	Other Info	Payments
Product	Description	Account
Analytic Distribution	Quantity	Unit of Measure
Unit Price	Discount (%)	Taxes
Amount		
Sofas	Luxury Sofas. All Black leather with recliner.	150000 Furniture and Equipment
	10.000 Unit(s)	10000.00 10.00 Tax 8.00% 90000.00

Subtotal : \$ 90000.00

Tax : \$ 7200.00

Total : \$ 97200.00

Balance : \$ 0.00

Payment Terms :

Additional Information :

We then draft an invoice.

Invoice SAJ/2013/0021

Customer
Javeri Capital
592 Fifth Avenue
New York, NY 10036
United States

Invoice Date 12/06/2013
Journal Sales Journal (USD)
Account 120010 Account Receivable

Fiscal Position

Invoice Lines Other Info Payments

Product	Description	Account	Analytic Distribution	Quantity	Unit of Measure	Unit Price	Discount (%)	Taxes	Amount
Sofas	Luxury Sofas. All Black leather with recliner.	150000 Furniture and Equipment		10.000	Unit(s)	10000.00	10.00	Tax 8.00%	90000.00

Subtotal : \$ 90000.00

Tax : \$ 7200.00

Total : \$ 97200.00

Balance : \$ 97200.00

Payment Terms

Additional Information

Draft Invoice is reviewed and processed as a final Invoice to Customer

Compose Email

Subject

OpenWood Invoice (Ref SAJ/2013/0032)

Recipients

Followers of SAJ/2013/0032 and

Clear Bright & Famous LLC <clearbright@nyit.edu> * Add contacts to notify...

B I U

Hello Clear Bright & Famous LLC,

A new Invoice is available for you:

REFERENCES

Invoice number: SAJ/2013/0032
Invoice total: 5400.0 USD
Invoice date: 2013-12-07
Order reference: SO040
Your contact: Chen, Xun

You can access the invoice document and pay online via our Customer Portal:

[View Invoice](#)

Invoice_SAJ_2013_0032_.pdf

Attach a file

Send or Cancel

Use template **Invoice - Send by Email**

Save as new template

After we created the invoice, we set email to inform our customer.

[Edit](#) [Create](#) [Print](#) [More](#)

[Deliver](#) [Print Delivery Order](#) [Cancel Transfer](#) [Draft](#) [Waiting Availability](#) [Ready to Deliver](#) [Delivered](#)

OUT/00036 [Claims](#)

Customer Clear Bright & Famous LLC
Stock Journal Delivery Orders

Creation Date 12/07/2013 12:00:00
Scheduled Time 12/14/2013 12:00:00
Carrier
Carrier Tracking Ref
Number of Packages 0
Source Document SO040

Products	Additional Info						
Product	Quantity	Unit of Measure	Product UOS	Serial Number	Pack	Destination Location	Status
[ALEX] Perfume	10.000	Unit(s)	Unit(s)			Partner Locations / Customers	Available

After we created invoice, we deliver the products to our customer.

Transfer Products

Product	Quantity	Unit of Measure	Serial Number
[ALEX] Perfume	10.000	Unit(s)	

[Add an Item](#)

[Transfer](#) or [Cancel](#)

[Print Delivery Order](#) [Print Delivery Slip](#) [Return Products](#) [Draft](#) [Waiting Availability](#) [Ready to Deliver](#) [Delivered](#)

OUT/00036 [Claims](#)

Customer Clear Bright & Famous LLC
Stock Journal Delivery Orders

Creation Date 12/07/2013 12:00:00
Scheduled Time 12/14/2013 12:00:00
Carrier
Carrier Tracking Ref
Number of Packages 0
Source Document SO040

Products	Additional Info						
Product	Quantity	Unit of Measure	Product UOS	Serial Number	Pack	Destination Location	Status
[ALEX] Perfume	10.000	Unit(s)	Unit(s)			Partner Locations / Customers	Done

Transfer the products.

Pay Invoice X

Customer	115 Mercer Retail Owner LLC, Javeri Cr	Date	12/06/2013
Paid Amount	\$ 97200.00	Period	12/2013
Payment Method	Cash (USD)	Payment Ref	e.g. 003/10
		Memo	Furniture (Sofas)

Difference Amount \$ 0.00

or

Customer receives invoice and pays order in cash.

Invoice SAJ/2013/0021

Customer	Javeri Capital 592 Fifth Avenue New York, NY 10036 United States	Invoice Date	12/06/2013
		Journal	Sales Journal (USD)
		Account	120010 Account Receivable

Fiscal Position

Invoice Lines	Other Info	Payments
Product	Description	Account
Sofas	Luxury Sofas. All Black leather with recliner.	150000 Furniture and Equipment

Analytic Distribution	Quantity	Unit of Measure	Unit Price	Discount (%)	Taxes	Amount
	10.000	Unit(s)	10000.00	10.00	Tax 8.00%	90000.00

Subtotal :	\$ 90000.00
Tax :	\$ 7200.00
Total :	\$ 97200.00
Balance :	\$ 0.00

Payment Terms

Additional Information

Invoice as has been paid by customer in cash and the balance is now zero

Send a message or Log a note

Shah, Monank D.



Invoice paid

- Currency: USD
- Subtotal: 90000.0
- Status: Open → Paid
- Type: Customer Invoice
- Partner: Javeri ... read more

Shah, Monank D. updated document • less than a minute ago • like



Note the invoice paid message at the bottom.



OpenWood
2930 Flood Ave
Redwood City, CA 94063
United States

Your Company Tagline

Phone:
Mail: info@openwood.com

Javeri Capital
592 Fifth Avenue
New York, NY 10036
United States
Tel : (212) 898-1010

Invoice SAJ/2013/0021

Description	Invoice Date	Source	Customer Code
	12/06/2013	50025	

Description	Taxes	Quantity	Unit Price	Disc.(%)	Price
Luxury Sofas. All Black leather with recliner.	Tax 8.00%	10.000 Unit(s)	10000.00	10.00	\$ 90000.00
Net Total:					\$ 90000.00
Taxes:					\$ 7200.00
Total:					\$ 97200.00

Tax	Base	Amount
Tax 8.00%	\$ 90000.00	\$ 7200.00

Generated by OpenWood.com

Email: info@openwood.com | Website: openwood.com
Contact : Chen, Xun - Page: 1

This is the invoice we print from the website.

Customer Invoices

Sales Team Powermen x



Create or Import

1-11 of 11



☐ Customer	Invoice Date	Number	Salesperson	Sales Team	Due Date	Source Document	Balance	Subtotal	Total	Status
☐ Javeri Capital	12/06/2013	SAJ/2013/0031	Chen, Xun	Powermen	12/07/2013	SO038	0.00	25000.00	27000.00	Paid
☐ Clear Bright & Famous LLC, David Bow	12/06/2013	SAJ/2013/0030	Chen, Xun	Powermen	12/07/2013	SO037	0.00	10000.00	10800.00	Paid
☐ 115 Mercer Retail Owner LLC	12/06/2013	SAJ/2013/0029	Chen, Xun	Powermen	12/07/2013	SO036	0.00	1000000.00	1080000.00	Paid
☐ 115 Mercer Retail Owner LLC	12/06/2013	SAJ/2013/0028	Chen, Xun	Powermen	12/07/2013	SO035	1080.00	1000.00	1080.00	Open
☐ Javeri Capital	12/06/2013	SAJ/2013/0027	Chen, Xun	Powermen	12/07/2013	SO034	0.00	500.00	540.00	Paid
☐ Clear Bright & Famous LLC, David Bow	12/06/2013	SAJ/2013/0026	Chen, Xun	Powermen	12/07/2013	SO032	0.00	500.00	540.00	Paid
☐ 115 Mercer Retail Owner LLC	12/06/2013	SAJ/2013/0025	Chen, Xun	Powermen	12/07/2013	SO031	0.00	25000.00	27000.00	Paid
☐ Javeri Capital	12/06/2013	SAJ/2013/0024	Chen, Xun	Powermen	12/07/2013	SO030	0.00	10000.00	10800.00	Paid
☐ 115 Mercer Retail Owner LLC	12/06/2013	SAJ/2013/0023	Chen, Xun	Powermen	12/07/2013	SO029	0.00	1000000.00	1080000.00	Paid
☐ Clear Bright & Famous LLC, David Bow	12/06/2013	SAJ/2013/0022	Chen, Xun	Powermen	12/07/2013	SO028	0.00	5000.00	5400.00	Paid
☐ Javeri Capital	12/06/2013	SAJ/2013/0021	Shah, Monank D.	Powermen	12/06/2013	SO025	0.00	90000.00	97200.00	Paid
Total							1080.00	2167000.00	2340360.00	

These are all orders we have finished, we searched and listed them on the customer invoices.

(3) RECOMMENDATIONS

SYSTEM ASSESSMENT

In our opinion, the system has its pros and cons. There are various menus, options and actions which that allow for easy interlinking of partners, its employees and search fields (Metadata in the database), but at the same time the system lacks the customizability that would be otherwise available on larger ERP Systems such as SAP. The human interface (GUI) is very user friendly and it helps us interpret information readily. The system can define the segmentation between records by assessing rules and parameters set forth by the user.

Aside from this the system has some other advantages for example, the software of OpenERP is free and the source code is open, making the user free to customize the software to meet their needs.

PROBLEMS

However, we can not ignore some the problems posed by the system. On one hand, the market position of OpenERP is ambiguous because it is free to download for everyone. On the other hand, compare it with other systems like SAP, the business features of OpenERP are not very extensive because it has only be around for 10 years and there are a lot of functions that can be improved like Sales and Accounting. One such example that is relevant to our project would be the ability to have an organization in the Care Of (C/O) of another managing entity. Such is the case with 115 Mercer Retail Owner LLC whose managing Entity is Javeri Capital LLC. Currently, OpenERP is setup to only allow partners to list employees as subcategories. Many organizations are managed by entities as opposed to individuals for added legal protection as is the case in our example.

With the problems in mind, we put forward two suggestions to solve these problems.

(i) OpenERP should increase investment on research and find out their customer base as well as corporate structuring.

(ii) OpenERP not only should learn other system like SAP, but also focus on their business scope. For example, it can develop some unique functions or mimick those that have been perfected in existing systems rather than reinvent the wheel.

