



## **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

# Purchases: Not so complex for services

## 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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