



## ERP HEADtoHEAD™ Virtual Event Demonstration Scripts, 2021

### 1 Projects Script

#### 1.1 Introduction to the ERP Product and Vendor

Provide a brief introduction to the ERP product and the vendor, covering:

- The ERP software author
- The software partner/reseller (if relevant)
- The names and versions of the software products being demonstrated today (including 3rd party software if relevant)

#### 1.2 Project Planning

Provide a brief overview of the functionality available to assist with project planning and scheduling by demonstrating the following:

- How a project is set-up in the system and how this is linked to the financial ledgers to ensure seamless financial reporting
- How a budget is assigned to a project, how this can be broken down to sub-projects (if required), and how this can then be used in a purchase order approval process
- How milestones can be assigned to the project and how these could be used as stage gates for both approval and billing
- How resources can be assigned to projects, ensuring that utilisation can be optimised

#### 1.3 Project Costing, Billing and Reporting

A key aspect of any project is understanding the costs and revenue versus budget. Please provide an overview of the functionality provided as standard by your system to capture project costs and enable project billing and reporting, showing:

- How time and expenses can be captured against the project using a mobile device
- How costs of goods and services are assigned to the project
- How the system supports periodic billing of the customer
- The project dashboards available to monitor and report project performance against budgets or milestones for a project or program of work

#### 1.4 Unique Selling Points

Provide an overview of some of the unique selling points for your system which are of relevance to project-based organisations (NOTE: Vendors are completely free to use this time as they see fit).

Overflow time/Questions

Total Session = 60 minutes