

ERP HEADtoHEAD™ Demonstration Script, Ireland, 2019

1.1 Introduction to the ERP Products 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 General Navigation

Provide a brief overview of the system interface and how to navigate around the system. During your demonstration please specifically show:

- Search capabilities
- Integration with Microsoft tools.

1.3 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 utilization can be optimised

1.4 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 costs against a project, enabling 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 Budget or Milestones for a project or program of work

1.5 Unique Selling Points

Provide an overview of some of the unique selling points for your system which are of relevance to project-based organisations.

1.6 Overflow time/Questions

Total Session = 60 minutes



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