Opening Up Enterprise Software

*with* opentaps *and* MySQL

---

Si Chen
Open Source Strategies, Inc.
Why We Are Here
What are Enterprise Applications?

- Control and Visibility across the entire Enterprise
Enterprise Software is Big Business

- Implementations of $250,000 and higher
- Enterprise Resource Planning: $25+ billion
- Customer Relationship Management: $6+ billion
- 75% of revenues from services and support
What's Wrong with Enterprise Software?

- High Cost
- Lack of Flexibility
- Vendor Lock-In
Why Open Source ERP Makes Sense

The key advantages of open source ERP to me are:

<table>
<thead>
<tr>
<th>Advantage</th>
<th>Votes</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lower cost vs. commercial alternative</td>
<td>139</td>
<td>34%</td>
</tr>
<tr>
<td>No vendor lock-in</td>
<td>90</td>
<td>22%</td>
</tr>
<tr>
<td>More flexible and adaptable to special needs</td>
<td>89</td>
<td>21.8%</td>
</tr>
<tr>
<td>Faster time to market vs custom alternative</td>
<td>29</td>
<td>7.1%</td>
</tr>
<tr>
<td>Lower cost vs. custom alternative</td>
<td>24</td>
<td>5.9%</td>
</tr>
<tr>
<td>Better technology</td>
<td>18</td>
<td>4.4%</td>
</tr>
<tr>
<td>Better features</td>
<td>9</td>
<td>2.2%</td>
</tr>
<tr>
<td>Lower support costs</td>
<td>6</td>
<td>1.5%</td>
</tr>
<tr>
<td>More secure</td>
<td>5</td>
<td>1.2%</td>
</tr>
</tbody>
</table>

Number of Voters: 409
First Vote: Tuesday, 08 November 2005 06:56
Last Vote: Monday, 17 April 2006 06:02

Source: Open Source Strategies, Inc. poll
Where We Are Today
What's New in Version 0.9

• Debut release as full ERP + CRM Suite
• Since Version 0.8 in August 2005
  • CRM application
  • Financials application
  • Manufacturing costing
  • New tax, returns, order entry, purchasing
## Account Details

### Account

- **Account Name**: Demo Sales Account No. 1
- **Local Name**: 
- **Annual Revenue**: 
- **Industry**: 
- **Ownership**: 
- **SIC Code**: 
- **Description**: A sample sales account
- **Person Responsible For**: Demo Sales Rep Three
- **Reassign To**: 

### Orders

<table>
<thead>
<tr>
<th>Parent Account</th>
<th>Site Name</th>
<th>Preferred Currency</th>
<th>Number Of Employees</th>
</tr>
</thead>
</table>

### Sources

- **New Data Source**: Cold Call

### Contact Information

<table>
<thead>
<tr>
<th>Contact Type</th>
<th>Contact Information</th>
<th>Purpose</th>
<th>Soliciting OK?</th>
<th>Options</th>
</tr>
</thead>
</table>

### Sources

<table>
<thead>
<tr>
<th>Source</th>
<th>From Date</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>New Data Source</th>
<th>Add</th>
</tr>
</thead>
</table>

## Footer

Welcome Demo Sales Manager | Profile | Logout

English (United States) | Set
## Order Header Info

- **Party:** DemoAccount1
- **Sales Account No. 1**
- **Currency:** USD
- **Total:** $72.34

## Clear Order

- ID: GZ-1000
- Quantity: 1
- Desired Delivery Date: (entry)
- Ship After Date: 
- Ship Before Date: 
- Comment: 
- Add To Order

## Add Order Items to Shopping List

- **Demo Catalog**

## Search Catalog

- **Any**
- **All**
- **Find**

## Browse Categories

- Gizmos
- Widgets
- Gift Cards
- Configurable PCs

## Order Items

<table>
<thead>
<tr>
<th>Product</th>
<th>Gift Wrap All Items?</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Adjustments</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>GZ-2844</td>
<td>Round Gizmo</td>
<td></td>
<td>2</td>
<td>38.40</td>
<td>$38.40</td>
</tr>
<tr>
<td></td>
<td>Round Gizmo w/ Lights</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Inventory:</strong> ATP = 505, QOH = 505</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Ship After Date:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Ship Before Date:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GZ-1001</td>
<td>Nan Gizmo</td>
<td>1</td>
<td>25.99</td>
<td></td>
<td>$25.99</td>
</tr>
<tr>
<td></td>
<td><strong>Indian style Nan gizmo</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Inventory:</strong> ATP = 0, QOH = 0</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Ship After Date:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Ship Before Date:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Order Items

<table>
<thead>
<tr>
<th>Product</th>
<th>Status</th>
<th>Quantity</th>
<th>Unit / List Adjustments</th>
<th>Sub Total</th>
</tr>
</thead>
</table>
| GZ-2644 - Round Gizmo | Current: Approved  
2006-04-21 16:23:34.0 : Approved  
2006-04-21 16:23:30.0 : Created | Ordered: 2  
Ship Request: 2  
Qty Shipped: 0  
Outstanding: 2  
Invoiced: 0  
Returned: 0 | Ship Request: 2  
38.40 / 48.00 (38.40) | 38.40 |
|             | Adjustment: Promotion: Test $ off products in categories |               |                         |           |
|             | Adjustment: Sales Tax: (California State Sales Tax) Jurisdiction: California [CA] Rate: 6.25 |               |                         | 2.40 |
|             | Adjustment: Sales Tax: (1% OFB NA Tax) Jurisdiction: Not Applicable [NA] Rate: 1 |               |                         | 0.38 |
|             | Price Rule Name [ID]: [9000:01][PRODUCT_CATEGORY_IDisPROMOTIONS] [list:48.0;avgCost:48.0;margin:0.0] [type:PRICE_POL] |               |                         | ($9.60) |
|             | Ship Group: [000001] 1234 Los Angeles Ave | Inventory: 9001 | Ship Group: 000001 | 2 |
| GZ-1001 - Nan Gizmo  | Current: Approved  
2006-04-21 16:23:34.0 : Approved  
2006-04-21 16:23:30.0 : Created | Ordered: 1  
Ship Request: 1  
Qty Shipped: 0  
Outstanding: 1  
Invoiced: 0  
Returned: 0 | Ship Request: 1  
|             | Adjustment: Sales Tax: (California State Sales Tax) Jurisdiction: California [CA] Rate: 6.25 |               |                         | 1.62 |
|             | Adjustment: Sales Tax: (1% OFB NA Tax) Jurisdiction: Not Applicable [NA] Rate: 1 |               |                         | 0.26 |
|             | Ship Group: [000001] 1234 Los Angeles Ave | Inventory: 10003 | Ship Group: 000001 | 1 |
| GZ-1000 - Tiny Gizmo  | Current: Approved  
2006-04-21 16:23:34.0 : Approved  
2006-04-21 16:23:30.0 : Created | Ordered: 1  
Ship Request: 1  
Qty Shipped: 0  
Outstanding: 1  
Invoiced: 0  
Returned: 0 | Ship Request: 1  
15.99 / 15.00 (15.99) | 15.99 |
### Production Run Declaration

**[ID: 10013]**

**Create a Production Run**

#### Production Run ID: 10013

**ProductionRun Name**: PROD_COST-Demo Routing for Costing

**Description**

**Estimated Start Date**: 2006-04-21 16:40:46.0

**Start Date**: 2006-04-21 16:42:41.0

**Calculated Completion Date**: 2006-04-21 18:30:00.0

**Completion Date**

- **Product ID**: [PROD_COST]/Demo Product for Costing
- **Qty To Produce**: 10
- **Produced**: 0
- **Rejected**: 0
- **Status**: Running

---

### List Of ProductionRun RoutingTasks

<table>
<thead>
<tr>
<th>Sequence Num</th>
<th>Routing Task Name</th>
<th>Status</th>
<th>Fixed Asset</th>
<th>Calculated Completion Date</th>
<th>Actual Setup Time</th>
<th>Actual Time</th>
<th>Produced</th>
<th>Quick Run All Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>Demo Routing Task for Costing [10014]</td>
<td>Running</td>
<td>WORKCENTER_COST</td>
<td>2006-04-21 18:30:00.0</td>
<td></td>
<td></td>
<td></td>
<td>Issue Components</td>
</tr>
</tbody>
</table>

**Quick Run All Tasks**
- **Issue Components**
- **Declare**

### List Of ProductionRun Components

<table>
<thead>
<tr>
<th>Routing Task Id</th>
<th>Product Name</th>
<th>Quantity</th>
<th>Issued</th>
<th>Returned</th>
<th>Quantity - selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Demo Routing Task for Costing [10014]</td>
<td>[MAT_A_COST]</td>
<td>20</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>Demo Routing Task for Costing [10014]</td>
<td>[MAT_B_COST]</td>
<td>30</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>
### Pack Order in Web Store Warehouse [ID:WebStoreWarehouse]

**Order #** WS10000 / **ShipGroup #** 00001

#### WS10000 / 00001

**Ship-To Address:**
To: Demo Account No. 1
1234 Los Angeles Ave
Los Angeles, CA 90000
USA

**Carrier/Shipping Method:**
DHL GROUND

**Shipping Instructions:**

---

**Product #**

<table>
<thead>
<tr>
<th>Product #</th>
<th>@</th>
<th>Pack Item</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>

**Current Package Sequence:** 1

---

<table>
<thead>
<tr>
<th>Item #</th>
<th>Sku</th>
<th>Description</th>
<th>Ordered Qty</th>
<th>Packed Qty</th>
<th>Pack Qty</th>
<th>Package</th>
</tr>
</thead>
<tbody>
<tr>
<td>00001</td>
<td>GZ-2644</td>
<td>Round Gizmo</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>Package 1</td>
</tr>
<tr>
<td>00002</td>
<td>GZ-1001</td>
<td>Nan Gizmo</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>Package 1</td>
</tr>
<tr>
<td>00003</td>
<td>GZ-1000</td>
<td>Tiny Gizmo</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>Package 1</td>
</tr>
<tr>
<td>00004</td>
<td>GZ-1006-1</td>
<td>Open Gizmo (LGPL)</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>Package 1</td>
</tr>
<tr>
<td>Account</td>
<td>Debit</td>
<td>Credit</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------------</td>
<td>------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>111100 GENERAL CHECKING ACCOUNT</td>
<td>$200,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>122300 ACCOUNTS RECEIVABLE - MASTER CARD / VISA</td>
<td>$82.40</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>140000 INVENTORY</td>
<td>$20,144.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>141000 RAW MATERIALS INVENTORY</td>
<td>$15,220.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>142000 WORK IN PROGRESS INVENTORY</td>
<td>$390.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>162000 BUILDING</td>
<td>$100,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>181000 ACCUMULATED DEPRECIATION - BUILDING</td>
<td>($892.86)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>191200 GOODWILL</td>
<td>$100,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>191900 ACCUMULATED AMORTIZATION</td>
<td>($625.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>210000 ACCOUNTS PAYABLE</td>
<td></td>
<td>$770.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>214000 UNINVOICED ITEM RECEIPTS</td>
<td>$16,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>224000 SALES TAX COLLECTED</td>
<td></td>
<td>$0.64</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>224106 SALES TAX COLLECTED USA - CA</td>
<td>$5.02</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>241000 LONG-TERM OBLIGATION</td>
<td></td>
<td>$100,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>330000 COMMON STOCK</td>
<td></td>
<td>$318,334.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>400000 SALES</td>
<td></td>
<td>$594.77</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>409000 MISCELLANEOUS SALES</td>
<td></td>
<td>$25.99</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>410000 DISCOUNTS ON SALES</td>
<td></td>
<td>$152.42</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>421000 CUSTOMER RETURNS - PRODUCTS</td>
<td>$499.99</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>422000 CUSTOMER RETURNS - PROMOTIONS</td>
<td>($103.99)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>423000 CUSTOMER RETURNS - ADJUSTMENTS</td>
<td>$5.40</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>600000 EXPENSE</td>
<td></td>
<td>($650.00)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>671000 DEPRECIATION - BUILDING</td>
<td>$892.86</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>731200 POSTAGE AND HANDLING FEES RECEIVED</td>
<td>$9.80</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>787000 AMORTIZATION EXPENSE</td>
<td></td>
<td>$625.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

$435,740.22 $435,740.22
### Balance Sheet for Your Company Name Here (Company)

Friday, July 01, 2005 Thru Saturday, July 01, 2006

#### Beginning Cash Balance

$0.00

#### Operating Cash Flow

- **Net Income**: $4,359.76
- **120000 ACCOUNTS RECEIVABLE**: $73.98
- **122300 ACCOUNTS RECEIVABLE - MASTER CARD / VISA**: $(101.29)
- **140000 INVENTORY**: $(22,942.95)
- **141000 RAW MATERIALS INVENTORY**: $(13,387.00)
- **142000 WORK IN PROGRESS INVENTORY**: $(2,965.00)
- **210000 ACCOUNTS PAYABLE**: $770.00
- **213000 CUSTOMER CREDITS**: $0.00
- **214000 UNINVOICED ITEM RECEIPTS**: $16,000.00
- **224000 SALES TAX COLLECTED**: $0.64
- **224106 SALES TAX COLLECTED USA - CA**: $5.02
- **224153 SALES TAX COLLECTED USA - UT**: $0.76

**Total Operating Cash Flow**: $(18,186.04)

#### Investing Cash Flow

- **162000 BUILDING**: $(100,000.00)
- **191200 GOODWILL**: $(100,000.00)

**Total Investing Cash Flow**: $(200,000.00)

#### Financing Cash Flow

- **241000 LONG-TERM OBLIGATION**: $100,000.00
- **330000 COMMON STOCK**: $318,334.00

**Total Financing Cash Flow**: $418,334.00

#### Total Net Cash Flow

$200,147.96

#### Ending Cash Balance

$200,147.96
### Featured Products

<table>
<thead>
<tr>
<th>Product</th>
<th>Price</th>
<th>Description</th>
<th>Add to Cart</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gift Card Activation</td>
<td>Your Price: From $1.00</td>
<td>Give the perfect gift!</td>
<td></td>
</tr>
<tr>
<td>Gift Card Reload</td>
<td>GC-002</td>
<td>Add more money to your card!</td>
<td></td>
</tr>
<tr>
<td>Round Gizmo</td>
<td>GZ-2644 $38.40</td>
<td>Round Gizmo w/ Lights - Usually ships in 15 Days!</td>
<td></td>
</tr>
<tr>
<td>Configurable PC</td>
<td>PC-001 $50.00</td>
<td>Configurable PC</td>
<td></td>
</tr>
<tr>
<td>Tiny Chrome Widget</td>
<td>WG-5569 $48.00</td>
<td>Tiny Chrome Widget - Usually ships in 2 Days!</td>
<td></td>
</tr>
<tr>
<td>Giant Widget</td>
<td>GI-9943 $440.00</td>
<td>Giant Widget with Wheels</td>
<td></td>
</tr>
</tbody>
</table>

*Details for Special Offers*
- **Details** with special code [9021] get products in the Featured Products category for their special promotion price.
- **Details** Spend more than $150 on your favorite gizmos (all products in Gizmo [100] or sub-category) and get a free Open Gizmo!
- **Details** $10 off entire purchase of $50 or more with promo code [9000], limit use of code to one per customer, limit for three uses total for the code.

---

**Browse Categories**
- Gizmos
- Widgets
- Gift Cards
- Configurable PCs

**Quick Reorder...**
- Round Gizmo GZ-2644 $38.40
- Micro Chrome Widget WG-1111 $59.99
- Tiny Gizmo GZ-1000 $15.99
- Giant Widget B4 WG-9943 $440.00

**Mini-Poll Poll**
Which side should the mini-poll box show?
- Right Side

---

**Language**
- English (United...

**Cart Summary**
- Shopping Cart is empty

---

**Cart Summary**
- Shopping Cart is empty

---

**Did you know?**
- The use of gizmos has been shown to have no negative effect on personal longevity.
- Did you know that widget users live twice as long as their non-widget counterparts?
Giant Widget
Giant Widget with Wheels
WG-9943
Sizes Available: 3-Wheel, 4-Wheel
Compare At: $922.00
List Price: $550.00
Regular Price: $549.99
On Sale! Your Price: From $440.00
Save: $110.00 (20%)
Quantity: 10
Weight: 22

Tell-A-Friend

Black Silver

This giant widget is mobile. It will seat one person safely. The wheels will never rust or break. Quite a unique item.

Customer Reviews:
This product hasn't been reviewed yet.
Be The First To Review This Product!!

You might be interested in these as well:
GZ-2644 - This makes it look much better.

Did you know?
- Gizmos are our most popular item.
- Did you know that widget users live twice as long as their non-widget counterparts?
### Tracking Code Report

**From:** 2006-04-01 14:34:55.441  **Thru:** 2006-04-30 14:34:55.441

<table>
<thead>
<tr>
<th>Tracking Code</th>
<th>Visits</th>
<th>Orders</th>
<th>Amount of Orders</th>
<th>Conversion Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPC Campaign 1 [9000]</td>
<td>4</td>
<td>1</td>
<td>18.85</td>
<td>0.25</td>
</tr>
<tr>
<td>PPC Campaign 2 [9001]</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>SKU</td>
<td>ITEM</td>
<td>QTY</td>
<td>AMT</td>
<td>SKU</td>
</tr>
<tr>
<td>-------</td>
<td>---------------</td>
<td>-----</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>GZ-2002</td>
<td>Square Gizmo</td>
<td>1</td>
<td>47.99</td>
<td>GIZMO 1</td>
</tr>
<tr>
<td>GZ-5005</td>
<td>Purple Gizmo</td>
<td>1</td>
<td>47.99</td>
<td>GIZMO 2</td>
</tr>
<tr>
<td></td>
<td>Sales Tax</td>
<td>-</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Grand Total</td>
<td>-</td>
<td>95.98</td>
<td></td>
</tr>
</tbody>
</table>
Why

• Robust data model: 730 tables
• Flexible service-oriented architecture
• Compatible with all major databases
• Highly scalable
• Global developer community
Under the Hood

View
- Model-View-Controller
- Freemarker/HTML
- Swing and XUI
- screen and form tools

Business Logic
- Service Oriented Architecture
- Java, scripting languages
- SOAP, RMI

Data
- data model in XML
- Automatic DB
- Database Independence

Workflow
- SECA
- XPDL

© 2006 Open Source Strategies, Inc.
Configuring MySQL for opentaps

- Very easy with MySQL 5.0:
  - Set up transactional, multi-lingual, OLTP
  - Configure opentaps for MySQL
  - Install seed data
For More Information

- Downloads:  
  sourceforge.net/projects/opentaps

- General information:  
  www.opentaps.org

- Developer tutorials:  
  wwwopensourcestrategies.com/ofbiz/tutorials.php
Where We Are Going
Coming Soon

- Project management and billing in CRM
- More reports and analysis in Financials
- Integrated Business Intelligence tool
- AJAX User Interface
- Multi-Tenancy
- Apache Geronimo
The Bigger Picture

Proprietary ERP

? High Cost Lack of Flexibility Vendor Lock-In

*$30+ billion enterprise software market = opportunities

Scalable and Robust Free Flexible Freedom
This is not the end. It is not even the beginning of the end. But it is, perhaps, the end of the beginning.

- Winston Churchill