

CASE STUDY



## Open Source ERP Ensures Smooth Integration and Transforms Company Trajectory





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The expertise of Open Source Integrators (OSI) was sought out by an international life sciences and clinical diagnostics company to deliver Open Source ERP best practices. The company provides the healthcare industry with products to help life sciences researchers and medical diagnostic labs. While the company was operating well enough, aspects of their processes and systems were broken. They had already selected USA Odoo and were using it, however, they realized the way they were using it wasn't optimal. When OSI proposed new solutions and adjustments, the company was receptive because they realized that what they had simply wasn't working.



# Challenges

The company was facing challenges related to product life cycle management and accounting. They were using USA Odoo accounting software but they were facing implementation and integration challenges.

They hadn't integrated purchasing, so when the company was making purchasing decisions, they were literally looking on the shelf to see what was low as opposed to having an integrated, systematic approach.

## Goals/Objectives

- + Assess the existing system to zero in on gaps.
- + Fix gaps and get accounting set up for them:
  - Fix purchasing
  - Fix purchasing lifecycle management
  - Set up accounting



# Solutions

Open Source ERP solutions were right-sized in a phased-in approach for Accounting, Purchasing, and Lifecycle Management. Best-of-class integrated Open ERP capabilities included:

+ **Accounting:**

Accounting-centric Open ERP software integration.

+ **Business Process Management:**

Business process optimization with Open ERP for improved results.

+ **Logistics:**

Empowering logistics with Open ERP best practices and customized technology.

+ **Customer Relationship Management:**

Driving customer intimacy with Open ERP technology.

+ **Data integration**

The power of real-time data unleashed with Open ERP.

+ **E-commerce**

Creating alignment between operations and customer experiences with Open ERP



# Results

- + Accounting rollout was one of the smoothest the company had ever implemented.
- + Due to the insight and support provided by the Open Source Integrators' team of experts, all company team members were open, ready, and receptive.
- + System integrity was proven every day. After the rollout occurred, there was a month of dual entry. Everything balanced on both sides every single day.
- + The accounting took less time and became more accurate:
  - Approximately 30 percent more efficient accounting reporting
- + Experienced a 15-20 percent increase in accuracy of product life cycle management and product tracking – with greater likelihood that the system accurately reflected an item's real-time production stage.
- + Product life cycle and accounting were the biggest wins.
- + Utilized USA Odoo to track product through research and development exploration. They have a structured process, and engineers could now experiment.
- + To leverage USA Odoo, they set up raw materials so that they feed into inventory to track what is available, track what is consumed/depleted through the life cycle, and trigger purchase orders.
- + All tracking now shows up on the accounting side so that profit-and-loss reports generate properly.



# The Power to Transform with Open ERP

Practically every software rollout has one or two people who are hesitant about the change. At this company, one naysayer was identified who, up until actual date to move opening balances, felt unsure the company was ready. After the switch, this person became a champion for USA Odoo and the power of Open ERP. Her perspective changed, and she gave Open Source Integrators everything they needed to verify numbers and was doing dual entry. She powered through because she saw USA Odoo perform so well, and saw the light at the end of the tunnel.



# The Open Source Integrators Difference

## **Open Source Integrators stands in a category of one.**

Open Source Integrators provides decades of experience in Open ERP spanning a wide range of industries. From small, independent entrepreneurs with a big idea to national infrastructure efforts, you can rely on the scalable ERP expertise from Open Source Integrators around the clock.

As a top independent Open Source Integrator in the US, Open Source Integrators provides customers a unique combination of open source business process consulting and improvements in industries ranging from construction and utilities to manufacturing, engineering, the service sector and direct to consumer.



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