

# workplan Solutions

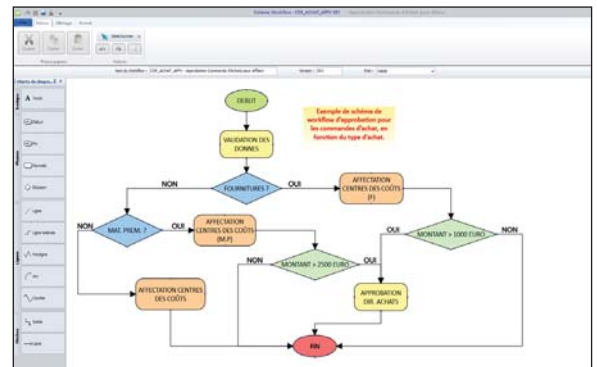
## WorkPLAN Solutions 2016 R1 - New Features and Improvements

Improve management and control of your industrial processes with the help of new modules and new functionality.

### WorkFLOW Module

The WorkFLOW module allows you to control a task accomplishment process defined by yourselves using diverse validation and decision phases. You can assign a specific, compulsory character to certain fields in order to move on to the next phases. WorkFLOWS are fully customizable according to predefined requirements:

- Definition of an unlimited number of WorkFLOWS per object (purchase orders, acknowledgements of receipt, quotes, etc...)
- Free structure or predefined WorkFLOWS with or without approval
- WorkFLOW graphic definition and display.



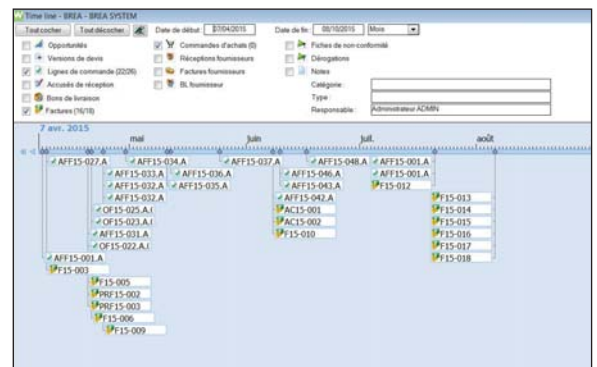
WorkFLOW Module

### CRM Module

The CRM module has been completely revised and includes new features dedicated to managing your sales activities.

You have now a timeline view, a Notes Summary, synchronization with the Outlook messaging service and geolocation.

You can also now create Provisional Budgets per salesperson and/or by sector of activity and/or by production type... and you can also follow their progression according to order confirmation or invoicing.

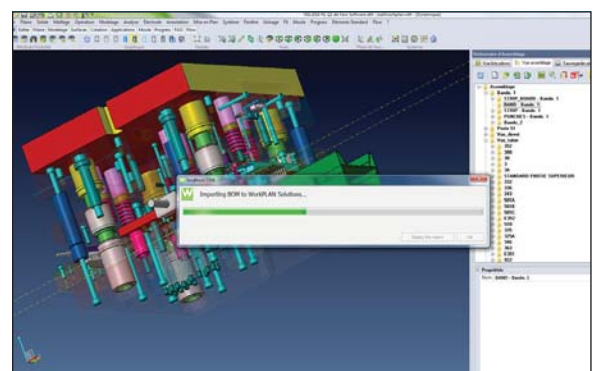


Time line

### Interface Native avec VISI CAO

WorkPLAN Solutions is now integrated into the VISI design application. A native link has been developed in order to simplify the automatic import process of technical data and bills of materials from VISI:

- Single click data synchronization using "WorkPLAN" button which is available in the VISI Assembly Manager.
- Complete technical breakdowns with multiple levels (assemblies and sub-assemblies) can be imported
- Standard elements can be regrouped from bills of materials
- Simplified purchasing process



VISI interface with single click data importing

Find us on

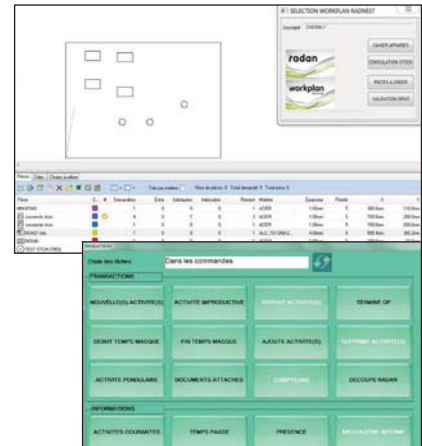
[www.workplan.com](http://www.workplan.com)

[www.facebook.com/erp.mto](https://www.facebook.com/erp.mto) 

## RADAN Native Interface (Sheet metal CAD/CAM)

Radan, the specialized CAD/CAM application for the sheet metalworking sector, now has an interface with WorkPLAN to guarantee data reliability and precision with just a few mouse clicks:

- Exchange of job registers and stock consultation
- Automatic component creation originating either from Radan or from WorkPLAN
- Management and control of off-cuts with traceability support (batch management, heat/casting codes...)
- Nesting display directly in WorkPLAN for each new production job
- Validation of costs (time and material) directly from TouchScreen Module
- A real management tool offering detailed analysis at job or line level.



New RADAN interface

## Stock Management using a tablet PC

Stock movements management whilst remaining fully mobile thanks to the new interface running on a tablet PC:

- Real time information exchange between stock controllers and supply/purchasing departments
- Access to component sheet and associated files
- Reception/dispatching according to jobs, sections, resources, employees
- Stock Inventories

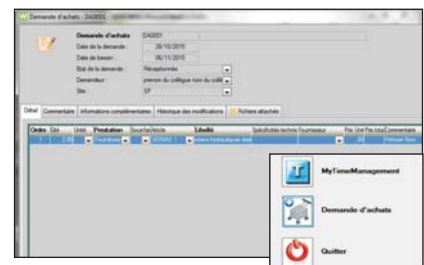


Tablet application for stock management

## Purchase Requests

A new tool to manage internal purchase requests centralized in a specific interface.

- Request history management with modification monitoring
- File association
- Approval procedure using WorkFLOW



Purchase Requests

## Fonctionnalités de Confort, un Plus pour nos utilisateurs :

This major new version offers a wide range of new features and enhancements aimed at making WorkPLAN Solutions more flexible for users throughout their entire project management process. From Quotations through to Quality Control, taking in design, manufacturing, technical data management, supplies, planning and time management, all the modules are brimming with new features.

- Drag&drop document management enhancements : word, Excel, pdf and email
- Planning : GANTT type resource visualization
- Standard print-out templates included in the software
- Standard graphics included in the analysis screens...

### VERO SOFTWARE

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