



Functional Guide

Nio Distribution Solution

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Document Details


Client Name Nio Digital Limited	
Proposal Title Nio Distribution Solution Functional Details	April 2024 Version 1.1
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Nio Distribution Solution

Overview

Nio Distribution Solution is a comprehensive, integrated platform designed to streamline and optimize the operations of distribution businesses. It is built upon the robust foundation of Odoo v17, enhanced with Nio-developed customizations and third-party code to cater specifically to the intricacies of local operations. This unique blend of technologies ensures that the solution is not only powerful and scalable but also adaptable to the nuanced requirements of distribution networks.

Key Features

Global and Local Compatibility

Leveraging the global standard of Odoo v17, Nio Distribution Solution offers worldwide compatibility while being finely tuned with Nio-developed enhancements for local market operations. This dual focus ensures that businesses can operate efficiently on a global scale while maintaining compliance and optimizing processes according to local business practices and regulations.

Comprehensive Module Integration

The solution encompasses modules for Sales/CRM, Inventory, Accounting, and Purchase management, among others, ensuring a seamless flow of information across

all business operations. This integration facilitates real-time data analysis, informed decision-making, and streamlined processes across departments.

Modern User Interface

With a modern user interface (UI) designed for ease of use and efficiency, users can navigate the system intuitively, significantly reducing the learning curve and enhancing productivity. The UI is optimized for both desktop and mobile use, ensuring accessibility and consistent performance across devices.

Advanced Customizations and Optimizations

Nio-developed customizations and optimizations address the specific challenges faced by distribution businesses, including complex inventory management, multi-tiered commissions strategies, and local tax compliance. These customizations are built on top of Odoo's versatile application framework, allowing for flexibility and scalability.

Third-party Integrations

The inclusion of third-party code and integrations further extends the capabilities of Nio Distribution Solution, enabling businesses to connect with a wider ecosystem of tools and services. This includes integrations with logistics providers and payment gateways, providing a holistic solution that meets the diverse needs of distribution businesses.

We also facilitate semi-automated integrations that are often required when data is required to be shared with other systems. Features like Import, Export and Webhooks are useful to reduce friction and increase accuracy when data for a process has to straddle multiple systems.

Scalability and Flexibility

Designed to grow with your business, Nio Distribution Solution supports scalability from small operations to large enterprises. The modular architecture allows businesses to add new functionalities as needed, ensuring that the platform remains aligned with evolving business requirements.

Conclusion

Nio Distribution Solution stands out as a tailored, comprehensive platform for distribution businesses, combining the global standards of Odoo v17 with specialized local optimizations and third-party integrations. This blend ensures that businesses can leverage the latest in ERP technology while remaining agile and responsive to local market demands. Whether for managing complex supply chains, optimizing inventory, streamlining sales processes, or ensuring accurate financial reporting, Nio Distribution Solution offers a unified, efficient approach to distribution management.

Sales

Overview

Nio Distribution Solution's sales module is designed to empower sales teams with tools for efficient selling, comprehensive customer management, and seamless integration of sales activities. With a modern user interface, mobile capabilities, and a suite of features for professional quotations and order management, the solution optimizes sales processes, enhances customer interaction, and drives sales growth.

Efficient Selling

- **Mobile Capabilities:** Utilize the mobile interface for sales activities on the go, ensuring no opportunity is missed.
- **Reduced Data Entry:** Streamline quote-to-invoice processes with minimal clicks, leveraging the integrated CRM for full sales pipeline management.
- **Sales Warnings:** Proactively receive alerts for specific customer issues or product concerns before sending quotations.
- **Professional Quotations:**
 - **Quotation Builder:** Instantly create polished quotes using predefined products, price lists, and templates.
 - **Quotation Template:** Customize and save quotation templates for future efficiency.
 - **Pro Forma Invoicing:** Easily send pro forma invoices to customers, enhancing transparency and trust.
- **Upselling:** Enhance revenue with optimized quotations that suggest additional products, discounts, and incentives.
- **Electronic Signature:** Accelerate deal closures with electronic signature capabilities for online quotation approval.
- **Variant Grid Entry:** Simplify adding product variants to orders with a comprehensive grid display of attributes like sizes and colors.

Modern User Interface

- Designed for Salespeople: The interface provides all necessary information in an intuitive layout, maximizing user efficiency and reducing learning curves.
- Streamlined Communication:
 - Schedule Activities: Directly manage follow-ups and sales activities, with reminders integrated into your workflow.
 - Email Gateways: Automatically attach email communications to customer orders for easy reference and negotiation tracking.

Order and Contract Management

- Sales Orders: Convert quotations to sales orders with a single click, manage modifications, and handle partial shipments with ease.
- Invoicing from Sales Orders: Flexible invoicing based on order details or time and materials, with comprehensive payment term management.
- Customer Portal: Offer real-time order and delivery tracking to customers through a dedicated online portal.
- Order-Specific Routes: Implement custom shipping and restocking strategies per order for optimal logistics.
- Contracts: Manage all contract phases, from invoicing and renewal to upselling, with integrated support for recurring revenue models.
- Electronic Signature: Secure NDAs, contracts, and other documents with easy-to-use electronic signing.

Product and Price Control

- Product Variants: Manage products with multiple attributes, ensuring detailed customization for customer needs.
- Discounts: Apply visible or hidden discounts on quotations to drive sales while maintaining pricing strategies.
- Product Types: Support a diverse product catalog, including tangible goods, services, and digital products.
- Shipping Cost Calculation: Utilize dynamic variables for precise shipping cost estimates.
- Promotions: Engage customers with custom coupons and promotional codes.

CRM

- Pipeline Management: Organize and visualize the sales pipeline to manage stages efficiently.
- Sales Teams: Manage multiple sales teams, allowing for tailored approaches and objectives.
- Lead Management: Generate, acquire, and convert leads into opportunities using targeted strategies.
- Sales Optimization: Create and send customized quotations directly from the CRM.
- Performance: Track and analyze sales performance and activities with analytics and reports.

Advanced Features

- Product Configurator: Enhance the shopping experience with a dynamic product configurator for accurate order customization.
- Units of Measure: Seamlessly sell and manage inventory in multiple units of measure.
- Pricelists: Dynamically adjust pricing based on customer segments or order specifics.
- Intuitive Reporting: Access a dashboard of KPIs for sales insights and performance analysis.
- Next Activities Overview: Maintain visibility on upcoming sales activities and performance metrics.
- CRM Integration: Leverage the Odoo CRM app for expanded sales pipeline management and lead scoring.
- Seamless eCommerce Integration: Extend sales capabilities with a fully integrated online store platform.

Inventory

Overview

The Inventory Module in Nio Distribution Solution is designed to optimize warehouse management and operations. It enables businesses to manage storage locations, streamline putaway and removal processes, and enhance overall operational efficiency with a suite of features tailored for diverse inventory management needs.

Storage Management

- **Locations:** Efficiently create and manage various storage locations within your warehouse, such as shelves, aisles, cold storage rooms, and pallet racks. This feature helps in organizing the warehouse for easy access and optimal space utilization.
- **Putaway Rules:** Implement automated rules to direct products to their ideal storage locations based on factors like real-time capacity, product storage requirements, and picking accessibility. This ensures that products are stored intelligently to support efficient picking and space utilization.

Operational Efficiency

- **Operations:** Set up dedicated areas within your warehouse for specific tasks, such as receiving, sorting, packing, and other operations. This organization enhances workflow and improves operational speed.
- **Smart Removal:** Employ strategic product removal methods (FIFO, FEFO, nearest available zone, LEFO) to optimize order fulfillment. Customize picker paths to ensure efficient and accurate order picking.
- **Role-based To-do List:** Use dedicated dashboards to prioritize tasks across different teams (order fulfillment, purchasing, quality, etc.), ensuring that orders are processed timely and efficiently.

Process Management

- **Receipts:** Manage incoming shipments effectively, with features to handle vendor-provided arrival dates and automatic conversions for received quantities (e.g., buying in tons and selling in kilograms).

- Returns: Configure predefined routes for handling returns, including condition assessment, refurbishing, restocking, or disposal. Integration with the Accounting app updates inventory valuation in real-time.
- Pick and Pack: Automate batch creation for picking based on various criteria (shipping carriers, serial numbers, etc.) and assign barcodes to packages for easy tracking and location updates.
- Scrap Management: Simplify scrapping processes with easy-to-use features for recording and reporting on scrapped products, including their costs, reasons, and volumes.

Inventory Control

- Inventory Adjustments: Schedule regular stock counts for key products or locations to maintain accurate inventory levels.
- Advanced Routes: Utilize drop-shipping and cross-docking strategies to minimize storage time and expedite order fulfillment.
- Push and Pull Rules: Design custom transfer routes between warehouses and locations to automate and streamline inventory movements.
- Multi-warehouse Management: Oversee storage, stock, and replenishments across multiple warehouse facilities within a unified system.
- Landed Costs: Take additional costs into account when calculating the valuation of a product and allocate based upon quantity, cost, weight or volume.

Productivity Tools

- Barcode System: Enhance warehouse operations with barcode scanning for receipts, picking, inventory adjustments, and more. Support for GS1, EAN13, and EAN14 standards facilitates universal compatibility.
- Customer Portal: Offer a live webpage where customers can track their order status, payments, and delivery updates. Enable easy returns with printable barcodes and customized instructions.

Forecasting and Planning

- Replenishment Alerts: Notify managers of low stock and assist in planning reorder schedules based on vendor lead times.
- Smart Scheduler: Leverage Odoo's automatic scheduler to trigger operations based on product availability and demand forecasts.
- Search and Reservation: Enable product and location searches within the warehouse and employ various reservation methods to manage stock availability.

- Forecasting: Generate real-time forecasts of stock levels to plan for reorders, manufacturing orders, and inter-warehouse transfers.

Traceability and Reporting

- Traceability: From quotation to shipment, track every product's journey through the supply chain. Use lots/serial numbers for detailed tracking and after-sales support.
- Inventory Valuation: Apply various costing (FIFO, AVCO) and valuation methods for accurate financial reporting. Manage landed costs to reflect all expenses associated with inventory.
- Reporting: Access comprehensive reports on stock movements, aging, and valuation for informed decision-making.

Integration and Customization

- Seamless Integrations: Integrate with Sales, Purchase, and third-party carriers for returns management, shipping cost calculation, and quality checks.
- Customization and Development: Use APIs for custom integrations with 3PL services, hardware devices, and other systems to tailor the inventory module to specific business requirements.
- Rental Management: Handle the complete lifecycle of rental products directly within the Inventory module.

Accounting

Overview

The Accounting Module in Nio Distribution Solution is designed for global compatibility, offering comprehensive features to streamline financial processes, enhance efficiency, and ensure compliance with local fiscal requirements. With its robust capabilities, from mobile access and AI-powered invoice digitization to multi-company management and advanced reporting, this module serves as a cornerstone for financial management within the platform.

Global Compatibility and Efficiency

- **Worldwide Compatibility:** Utilizes Fiscal Localization Packages to tailor your database to the specific taxes, fiscal positions, chart of accounts, and legal statements of your country, enabling immediate operation without extensive setup.
- **Mobile Apps:** Offers native iOS and Android apps that cover 100% of features, ensuring fast user experiences even on slow internet connections, allowing for financial management on the go.
- **AI-Powered Invoice Digitization:** Automatically encodes scanned PDF or image format invoices using AI, reducing manual data entry and improving accuracy.
- **Multi-Companies:** Streamlines financial management across subsidiaries with a single subscription, featuring real-time consolidation reports and automated intercompany transactions.

Accounts Receivable and Payable

- **Attractive Invoice Templates:** Customize invoices with a selection of templates, colors, and fonts to reflect your brand and enhance customer experience.
- **Instant Invoice Draft:** Automatically generates draft invoices from sales orders, subscriptions, timesheets, or delivery orders, simplifying the billing process.
- **Credit Notes and Refunds:** Facilitates the creation of credit notes directly from invoices or bills, simplifying the refund process.
- **Sales Credit Limit:** Alerts for transactions exceeding a partner's receivable limit, aiding in risk management.

- Multi-Currency Support: Offers daily updated currency rates, enabling smooth international transactions.

Payment and Reconciliation

- Online Payments: Integrates with local payment gateways like FAC, WiPay and Scotiabank as well as major international payment gateways like Stripe, PayPal, and more, allowing customers to pay invoices online directly through the Customer Portal.
- Automated Follow-Ups: Implements automated processes for credit collection, including follow-up emails and tasks.
- Mobile Payment with QR Codes: Enhances invoice payments with QR codes for easy mobile payments.
- Direct Payments and Batch Payments: Facilitates automated payments and efficient management of multiple payments, streamlining the payables process.

Banking and Cash Management

- Manage Cash Registers: Tracks every cash transaction, from opening to closure, ensuring accurate cash handling.
- Easy Reconciliation: Provides a smart tool for quick and efficient reconciliation of banking and accounting records.

Reporting and Compliance

- Legal Statements and Advanced Taxes Management: Generates detailed legal statements and manages complex tax scenarios, ensuring compliance with local regulations.
- Tax Reports and Audit Report: Offers customizable tax reporting and an accessible tax audit report, simplifying tax filing and audits.

Analytic Accounting and Budgeting

- Analytic Accounting: Structures analytic accounts based on projects, departments, etc., offering deep insights into financial performance.
- Budget Management: Tracks and compares budgeted vs. actual performance, facilitating effective financial planning.

Asset and Revenue Management

- **Assets Management:** Manages asset lifecycle, from acquisition through depreciation and disposal, automating accounting entries.
- **Revenue Recognition:** Automates the recognition of deferred revenue and expenses, providing accurate financial statements.

Integrations and Customization

- **Flexible Import-Export and API:** Offers easy data migration and integration with third-party applications via a comprehensive API.

Ecosystem Integration

- **Seamless Integration with Sales, Inventory, Purchase, and eCommerce:** Ensures that all financial transactions are accurately reflected in the accounting records, from sales and inventory movements to purchase orders and eCommerce activities.

Purchase

Overview

The Purchase Module in Nio Distribution Solution streamlines procurement processes, ensuring efficiency, accuracy, and strategic vendor management. Designed with a modern user interface, it simplifies complex purchase activities, enabling businesses to manage quotations, orders, and vendor relations with ease. This guide highlights the module's key features and functionalities that support clean, fast, and effective purchasing operations.

Efficient and Modern Purchasing

- **Modern User Interface:** A sleek, intuitive interface designed for swift inventory management, enhancing productivity with or without barcode scanners.
- **Control Vendor Bills:** Implements 3-way matching to ensure accuracy between Purchase Orders, Vendor Bills, and Receipts, avoiding overpayments or fraudulent charges.
- **Purchase Tenders:** Facilitate competitive bidding through purchase tenders, comparing proposals and selecting the best offer with comprehensive reporting tools to analyze vendor performance.
- **Blanket Order Agreement:** Establish recurring purchase agreements at negotiated prices for a set period, ensuring consistent supply and pricing.

Requests for Quotations (RFQs)

- **Create and Send RFQs:** Easily generate RFQs for suppliers and send them via email or post directly from the app, including for multiple items simultaneously.
- **Personalize Your Messages:** Add custom messages to suppliers for each RFQ, enhancing communication and relationship management.
- **Automate RFQ Process:** Set up rules to automatically issue RFQs based on stock levels, reducing manual intervention and ensuring timely replenishment.

Order Management

- **Variants Grid Entry:** Add product variants to purchase orders using a grid display, simplifying the ordering process for complex inventories.

- **Manage Orders and Invoices:** Monitor RfQ and order statuses, manage incoming products, and create draft invoices that can be easily modified or finalized.
- **Automate Ordering:** Implement procurement rules to automatically place orders based on various parameters like stock levels and minimum quantities, ensuring optimal inventory levels.

Product and Supplier Management

- **Handle Products:** Streamline product creation, including defining sale prices, types, barcodes, and adding supplier references for easy identification.
- **Define Procurement Rules:** Link specific vendors to specific products and set vendor-specific information, such as prices, minimum quantities, and lead times.
- **Units of Measure:** Manage purchases in different units of measure with automatic conversion, facilitating accurate order and stock management.

Strategic Purchasing Tools

- **Analyze & Forecast:** Utilize advanced dashboards and reporting tools to analyze purchasing patterns, forecast inventory needs, and make data-driven decisions.
- **Multi-Company Rules:** Manage purchasing activities across multiple companies within a single Odoo environment, with automatic reconciliation between company transactions.

Integration and Scalability

- **Integrate Seamlessly:** The Purchase Module integrates closely with the Accounting, Sales, and Inventory modules, ensuring that purchasing activities are reflected across financial and operational systems.
- **Scalable Solutions:** Designed to scale with your business, the module supports growth, from increasing product lines to expanding into new markets or adding new companies to your organization.

Benefits

The Purchase Module in Nio Distribution Solution offers a comprehensive set of tools that:

- Enhance purchasing efficiency and accuracy.
- Streamline communication and negotiation with suppliers.
- Automate and optimize procurement processes.
- Provide deep insights into purchasing patterns and supplier performance.
- Support global and multi-company operations with ease.