



Geofinity Solutions Pvt. Ltd.
A Platform For Your IT Investments



Product Introduction

We are proud to welcome you all in today's product presentation and review session.



<https://geofinity.com.np/>

<https://opterp.com/>

OUR COMPANY

WE ARE VISIONARY

Innovating The Future Of IT Investments Since 2016

At Geofinity Solutions Pvt. Ltd., we pride ourselves on our visionary approach to software development, dedicated to transforming business operations and securing a competitive edge in the digital age. Our expert team stays ahead of industry trends, integrating cutting-edge tools to streamline operations and enhance data management. We harness technology to create bespoke solutions, tailored to each client's unique needs. At Geofinity, we build lasting partnerships, committed to understanding and supporting our clients' goals. Whether modernizing IT infrastructure, optimizing marketing strategies, or securing digital futures, Geofinity Solutions is your trusted partner in innovation and growth.



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OUR GOALS

Driving Innovation, Delivering Excellence

At Geofinity, we are driven by a passion for innovation and a commitment to excellence.

- ✓ **Cutting-Edge ERP Solutions**
- ✓ **Scalable Web & Cloud Services**
- ✓ **Strategic Brand Management**
- ✓ **Targeted Product Marketing**
- ✓ **Efficient Content Management**
- ✓ **Harnessing Insights with Big Data**



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Cutting-Edge ERP Solutions

- ✓ OptERP comes with complete content management with blogs, web pages and forms.
- ✓ With your CRM, you gain and retain customers by optimizing the sales process.
- ✓ Keep track of project assignments, time sheets, and issues.
- ✓ Increase productivity and reduce costs by managing your sales and purchase cycles.
- ✓ Manage the entire employee lifecycle from onboarding, payroll, attendance, and expense claims.
- ✓ Strategic Brand Management Targeted Product Marketing Efficient Content Management
- ✓ Harnessing Insights with Big Data



Main Modules

✓ Account Management

You'll get a real-time view of all your finances, plus it's a module from which you can manage every aspect of accounting. "All the tools you need to manage cash flow in one place, from recording transactions to summarizing and analyzing financial reports. It is easy to do the accounting".

✓ HR & Payroll Management

It is one of the departments that executes the most processes, therefore, it is always convenient to digitize and automate all the processes that can be done. With the OptERP software, you can manage the hiring of employees, their entry into the payroll, monitor employee attendance, register claims, suggestions.

✓ Customer Relationship Management

The OptERP CRM helps to organize the entire sales process and the cycle with customers. Likewise, make it possible to follow up on potential clients, helping to detect business opportunities. In addition, it generates reports that show the performance of the sales team.



Other Modules

✓ Website Management

Manage website with content management, blogs, web pages and forms.

✓ Inventory Management

Track and manage your stock levels, orders, and deliveries to optimize inventory flow and reduce wastage.

✓ Manufacturing & Production

Streamline production processes, manage resources, and track manufacturing workflows for efficient operations.

✓ Project Management

Plan, execute, and monitor projects, track progress, and ensure timely delivery of milestones.

✓ Sales & Purchase Orders

Manage sales and purchase orders from creation to fulfillment, ensuring seamless order processing and tracking.

✓ Customer Support

Provide timely assistance to your customers through multiple support channels, enhancing customer satisfaction.

OptERP **Features**

● **INFORMED DECISION-MAKING**

OptERP provides real-time financial data, helping businesses make strategic decisions quickly. Its detailed reports allow accurate assessments of financial health and future planning.

● **REGULATORY COMPLIANCE**

OptERP ensures compliance with financial regulations through automated tax calculations, timely filings, and standardized reporting, reducing risk and maintaining audit readiness for evolving requirements.

● **INVESTOR CONFIDENCE**

OptERP boosts investor confidence by delivering transparent, accurate financial reports. It helps businesses demonstrate financial stability, increasing trust and attracting potential investors for growth.

OptERP **Features**

● **STREAMLINE BUSINESS PROCESS**

OptERP automates financial operations like invoicing and payment tracking, reducing manual tasks and errors. This streamlines business processes, improving efficiency and enabling focus on business growth.

● **REAL TIME REPORTING AND INSIGHTS**

OptERP provides real-time reporting, offering instant insights into cash flow and profitability. This helps businesses make informed decisions quickly and respond to market changes efficiently.

● **SCALABLE TO BUSINESS NEEDS**

OptERP is flexible, scaling as businesses grow. It handles increased transactions, advanced features, and more users, ensuring seamless financial management regardless of business size.



ACCOUNTING

- ★ Chart of Accounts - Define Account Structure
- ★ Budget Management
- ★ Cash Management
- ★ Banking and Reconciliation
- ★ Multi Currency Support
- ★ Sales and Receivables
- ★ Purchases and Payables
- ★ Expense Management
- ★ Asset Management
- ★ Payroll Accounting
- ★ Journal Entries
- ★ Tax Management
- ★ Financial Reporting

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FUNDAMENTAL ACCOUNTING PRINCIPLES

✓ FINANCIAL STATEMENTS

OptERP generates essential financial statements such as balance sheets, income statements, and cash flow reports, providing a comprehensive view of a company's financial position, performance, and cash movements.

✓ REVENUE RECOGNITION

OptERP follows the principle of recognizing revenue when earned, not when received. This ensures accurate reporting of income, aligning revenue with the delivery of goods or services.

✓ MATCHING PRINCIPLE

OptERP applies the matching principle by recording expenses in the same period as the revenue they generate, ensuring accurate reflection of profitability and a clear understanding of operational costs.

OptERP **ANALYZING FINANCIAL RATIOS**



LIQUIDITY

With OptERP, financial data is updated in real-time, allowing users to have current insights into current assets and liabilities. This real-time access means that analyses such as the current ratio, quick ratio, and cash ratio can be performed with the most relevant and up-to-date figures.



PROFITABILITY

OptERP allows companies to track income and expenses effectively. Users can categorize expenses and revenues, facilitating the calculation of profitability ratios like gross profit margin, net profit margin, return on assets (ROA), and return on equity (ROE) directly from the custom reports.

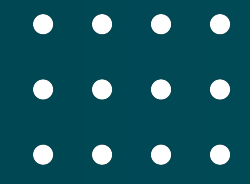


EFFICIENCY

OptERP inventory management module provides real-time data for calculating inventory turnover ratios, enhancing stock efficiency. Its accounts receivable tools, including invoice generation and payment reminders, enable businesses to assess accounts receivable turnover ratios, improving collection practices and cash flow management.



ACCOUNTING AUTOMATION AND TECHNOLOGY



**BIOMETRIC
ATTENDANCE**



**AI BASED DATA
ENTRY**



**TAX PLANNING
AND COMPLIANCE
WITH IRD**



Customer Relationship Management

- ★ Contact Management
- ★ Lead Management
- ★ Opportunity Tracking
- ★ Sales Pipeline Management
- ★ Communication Tracking
- ★ Task Management
- ★ Reporting and Analytics

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OptERP

● **Contact Management**

OptERP CRM allows you to store and manage detailed information about your customers, including their contact details, communication history, activities, and notes. You can easily access and update customer data from a centralized database.

● **Lead Management**

The CRM module enables you to capture and manage leads effectively. You can create leads manually or automatically convert them from website inquiries, emails, or other sources. You can assign leads to sales representatives, track their progress, and prioritize them based on their potential.

● **Opportunity Tracking**

OptERP CRM helps you track and manage opportunities, which represent potential deals or sales. You can create opportunities from leads or directly enter them into the system. You can assign opportunities to specific sales representatives, track the sales pipeline, and monitor the progress of each opportunity.

OptERP

● **Sales Pipeline Management:**

The CRM workflow in OptERP allows you to define a structured sales pipeline with different stages, such as prospecting, qualification, proposal, negotiation, and closure. You can customize the pipeline stages to align with your business processes. As leads and opportunities progress through the pipeline, you can update their status and track key metrics like conversion rates and win-loss ratios.

● **Communication Tracking**

OptERP provides real-time reporting, offering instant insights into cash flow and profitability. This helps businesses make informed decisions quickly and respond to market changes efficiently.

● **Task Management**

The CRM module includes task management capabilities, enabling you to assign tasks to team members, set deadlines, and track task completion. This helps in coordinating activities and ensuring timely follow-ups with customers.

● **Reporting and Analytics**

OptERP CRM provides various reports and analytics to gain insights into your sales performance, lead conversion rates, customer interactions, and more. You can generate custom reports, visualize data with charts and graphs, and make data-driven decisions to optimize your sales processes.



FUNDAMENTAL CRM PRINCIPLES

✓ Customer-Centric Approach

Prioritize the customer in every business decision and interaction. This involves understanding their needs, preferences, and behaviors to deliver personalized experiences and build long-term relationships.

✓ Data-Driven Insights

Leverage customer data to make informed decisions. Analyze data to predict customer needs, identify patterns, and optimize engagement, ensuring a proactive approach to managing customer relationships.

✓ Automation and Efficiency

Use automation to streamline repetitive tasks and improve operational efficiency. Automating processes like follow-ups and reporting ensures consistency, reduces manual effort, and enhances productivity.



ANALYZING CRM RATIO



Customer Acquisition Cost (CAC)

With OptERP, financial data is updated in real-time, allowing users to have current insights into current assets and liabilities. This real-time access means that analyses such as the current ratio, quick ratio, and cash ratio can be performed with the most relevant and up-to-date figures.



Customer Retention Rate

ERPNext allows companies to track income and expenses effectively. Users can categorize expenses and revenues, facilitating the calculation of profitability ratios like gross profit margin, net profit margin, return on assets (ROA), and return on equity (ROE) directly from the custom reports.



Conversion Rate

ERPNext's inventory management module provides real-time data for calculating inventory turnover ratios, enhancing stock efficiency. Its accounts receivable tools, including invoice generation and payment reminders, enable businesses to assess accounts receivable turnover ratios, improving collection practices and cash flow management.



ANALYZING CRM RATIO



Customer Lifetime Value (CLV)

With OptERP, financial data is updated in real-time, allowing users to have current insights into current assets and liabilities. This real-time access means that analyses such as the current ratio, quick ratio, and cash ratio can be performed with the most relevant and up-to-date figures.



Return on Investment (ROI) of CRM

OptERP allows companies to track income and expenses effectively. Users can categorize expenses and revenues, facilitating the calculation of profitability ratios like gross profit margin, net profit margin, return on assets (ROA), and return on equity (ROE) directly from the custom reports.

Benefits of CRM Ratio Analysis:

Better Decision-Making: By analyzing these ratios, you can make more data-driven decisions on where to allocate resources for marketing, sales, and customer service.

Identify Areas for Improvement: CRM ratio analysis highlights strengths and weaknesses, allowing you to focus on improving lead conversion, customer retention, or reducing acquisition costs.



HR - Management

JOB

- ★ Staffing Plan
- ★ Job Requisitions
- ★ Opportunity Tracking
- ★ Job Opening
- ★ Job Applicant
- ★ Job Offer
- ★ Employee Referral

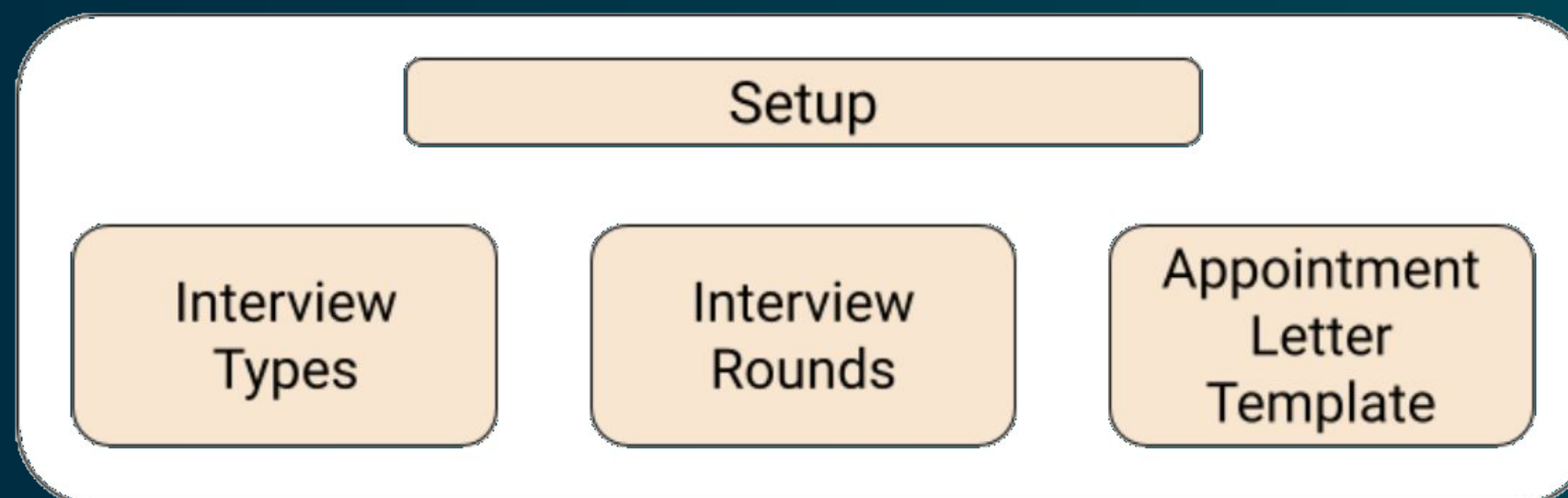
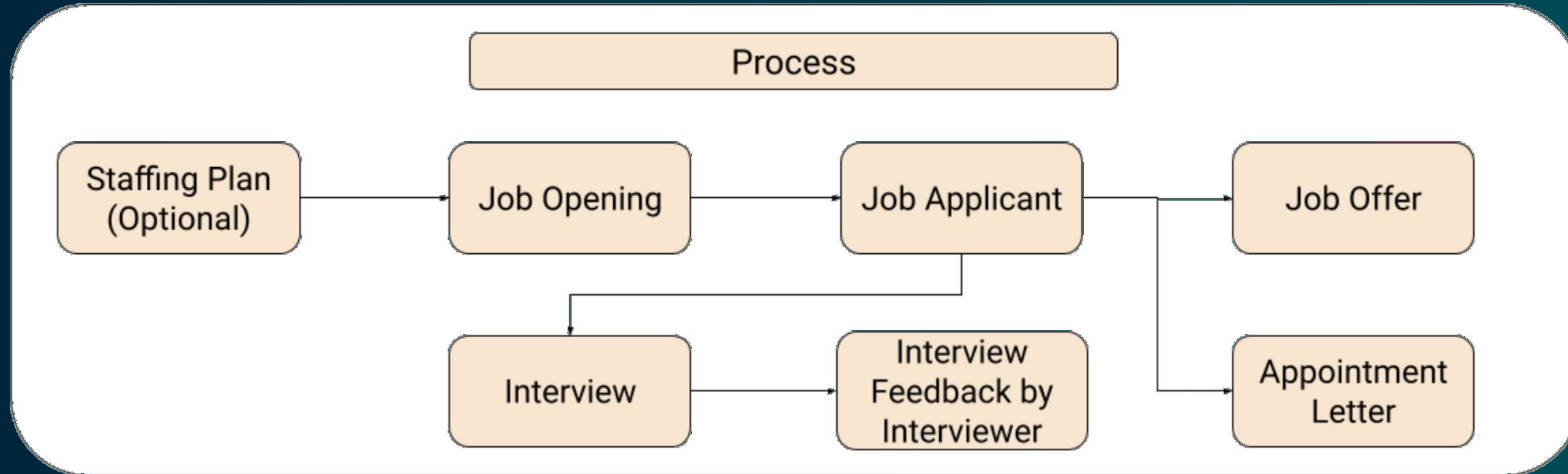
INTERVIEW

APPOINTMENT

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Recruitment Process





FUNDAMENTAL RECRUITMENT PRINCIPLES

✓ Merit-Based Selection

Candidates should be evaluated and selected based on their qualifications, skills, experience, and potential to contribute to the organization. This principle ensures that the best candidates for the job are chosen without any bias or favoritism.

✓ Equal Opportunity

Ensuring that the recruitment process is free from discrimination and provides equal access to opportunities for all candidates, regardless of gender, race, religion, or background. This principle fosters diversity and inclusivity in the workplace.

✓ Transparency

The recruitment process should be open and transparent. Job descriptions, selection criteria, and the overall process should be communicated clearly to candidates. Transparency builds trust and ensures that candidates understand how decisions are made.



Human Resource Management System (HRMS)

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- ★ Employee Information Management
- ★ Leave and Attendance Management
- ★ Payroll and Salary Processing
- ★ Performance Management
- ★ Employee Self-Service Portal
- ★ Expense and Travel Management
- ★ Training and Development



Leave Management

Setup

Holiday List

Leave Types

Leave Period

Leave Policy

Other Features

Leave Application

Compensatory Leave Request

Leave Encashment

Leave Block List

Steps for Leave Allocation

Individual Leave Policy Assignment

Bulk Leave Policy Assignment

Leave Allocation

Reports

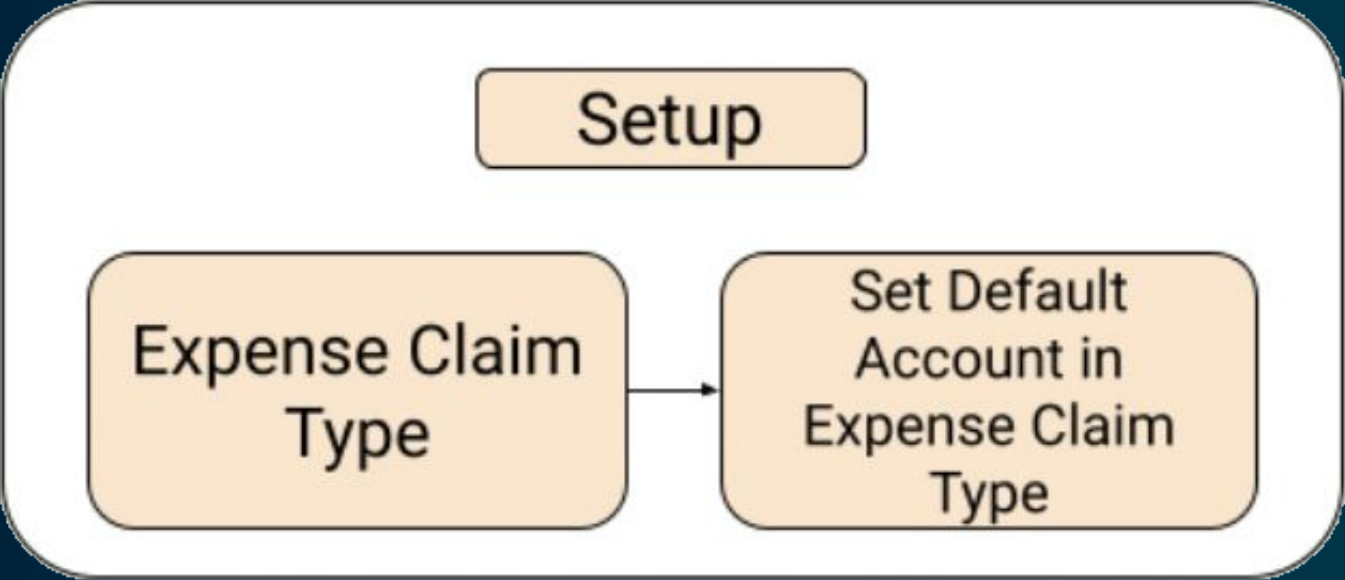
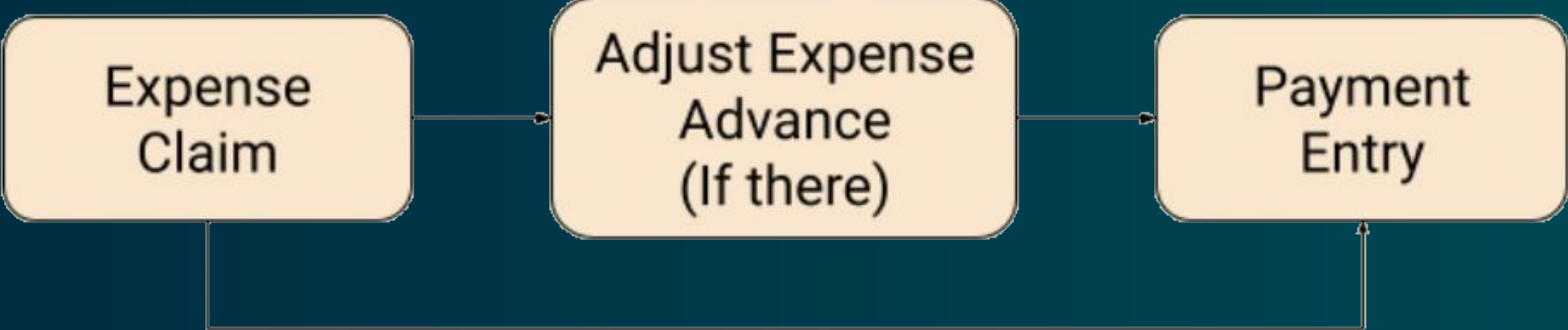
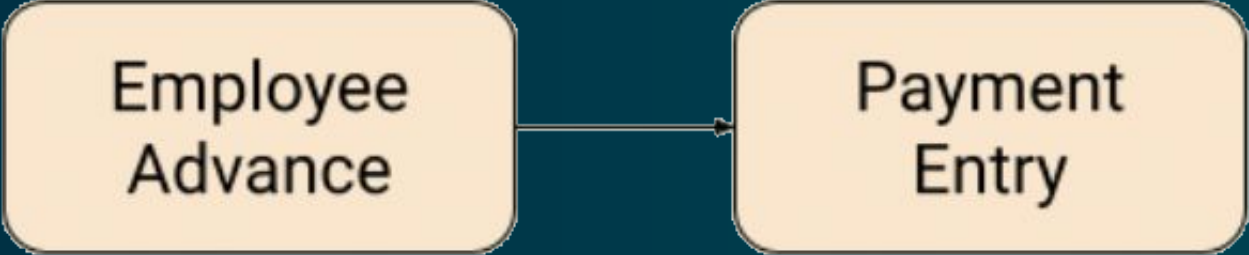
Employee Leave Balance

Employee Leave Balance Summary

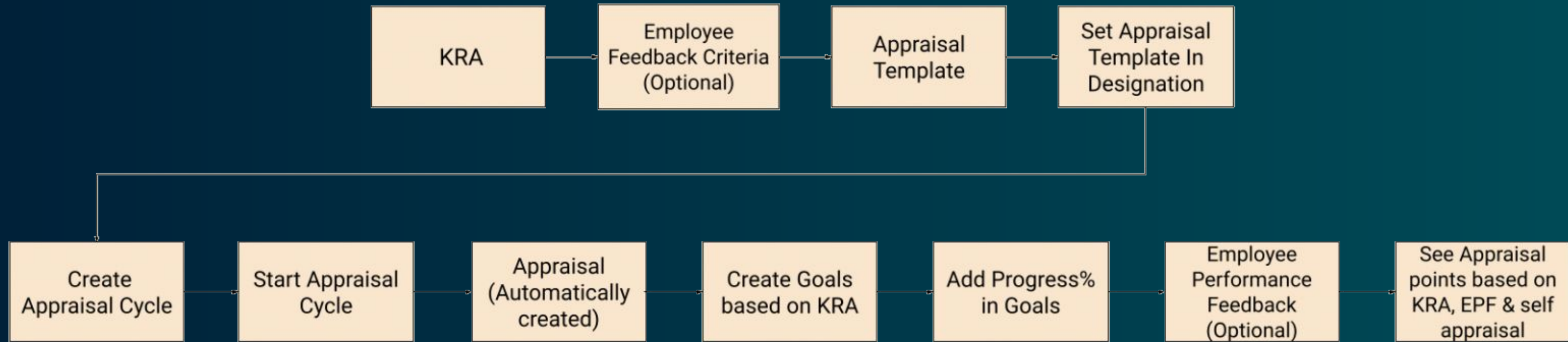
Employees working on a holiday



Expense Claim



Appraisal Management



FEATURES ANALYSIS

FEATURES	
Deployment	Cloud & on-premise options
Customizability	High
User Interface	User-friendly
Accounting	All in one accounting package
Project Management	Flexible project tracking features
HR and Payroll	Advanced HR and payroll management
Integration	Strong integration support with API
Ease of Use	Simple, user-friendly interface
Industry Focus	Small/medium businesses



REVIEW

Criteria	OptERP
Features	<ul style="list-style-type: none">- Integrated with ERP functionalities- Customizable dashboards and reporting- Lead and opportunity management- Customer support ticketing system- Email integration and tracking- Workflow automation and reminders
Pricing	<ul style="list-style-type: none">- Competitive pricing models- Potential one-time fees for specific features
Usability	<ul style="list-style-type: none">- User-friendly interface- May require some training
Integration	<ul style="list-style-type: none">- Strong integration within the OptERP ecosystem- API support for other business tools
Support and Community	<ul style="list-style-type: none">- Community-driven resources- Paid support options available
Customization	<ul style="list-style-type: none">- Highly customizable for specific needs
Scalability	<ul style="list-style-type: none">- Designed to scale with business growth



CONCLUSION

In conclusion, OptERP offers a **comprehensive business management solution** tailored for SMEs, providing key features such as **financial tracking, inventory management, payroll, customer relationship management, and task management**, among others. OptERP serves as the backbone of business operations for its users, empowering them to make informed **decisions, improve operational transparency, and maintain control** over their growing enterprise. By offering these integrated capabilities, OptERP enhances its value proposition for businesses looking to streamline processes and drive growth.



KEY TAKEAWAYS



ACCURATE RECORDS

USER-FRIENDLY

MASTERING PRINCIPLES

END-TO-END SOLUTION

LEVERAGING TECHNOLOGY





CLOUD, ON-PREMISE, HYBRID



THANK YOU

FOR YOUR ATTENTION

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