



# INDUSTRIA FINANCIARĂ ÎN ERA DIGITALĂ

## Utilizarea Charisma Business Suite în serviciile de leasing și credit

# Condiții generale

**Volum mare  
de date**

**Viteza de decizie**

**Mobilitate**

**Multiple  
documente de  
gestionat**

# Volum mare de date

1.

- Informații multiple despre **clienți și parteneri**;

2

- Număr mare de documente generate (contracte, facturi,

3

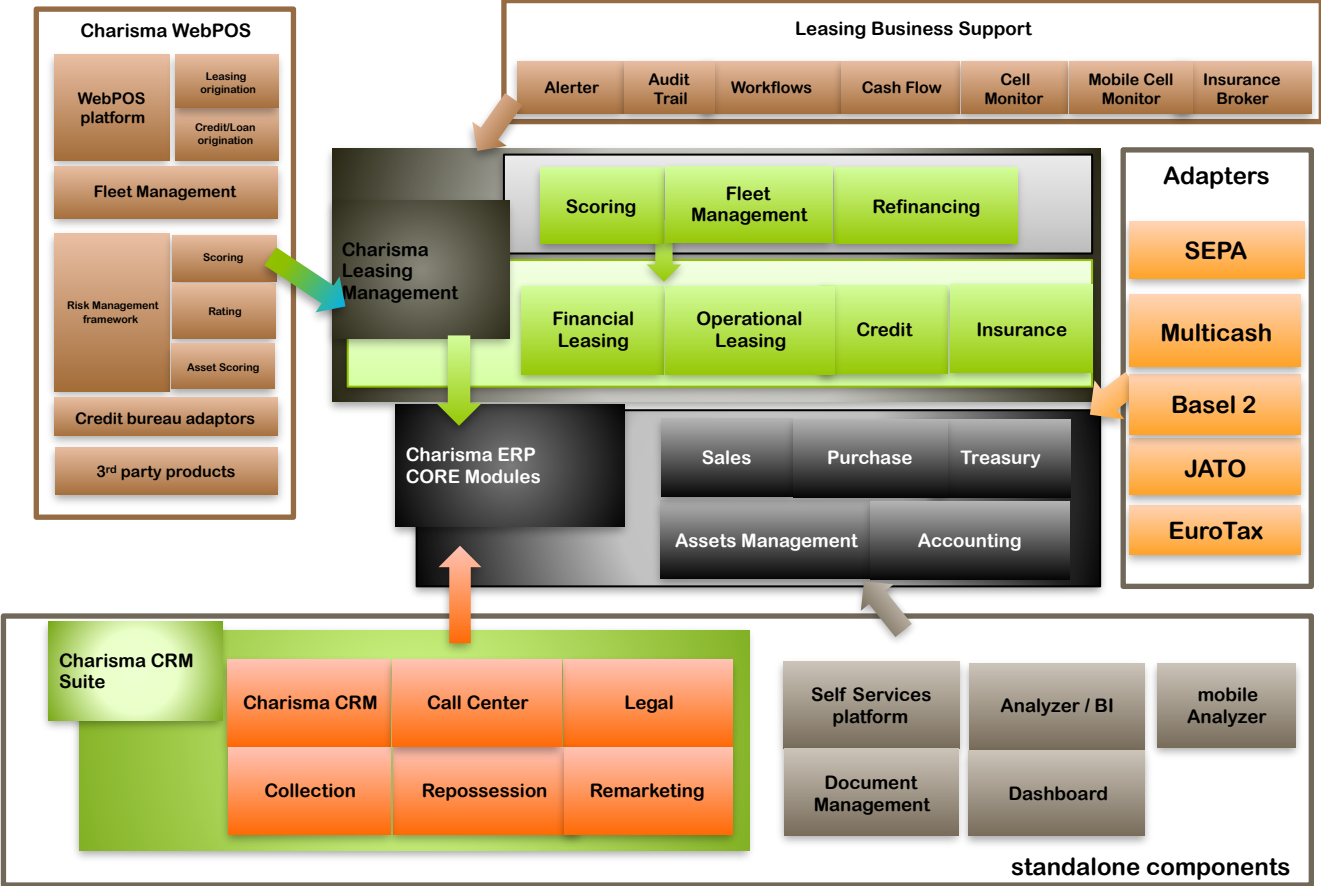
- Prelucrare automată, fără intervenție umană;

**Sistem informatic rapid, eficient și complet integrat**

# Charisma Leasing / Credit Management



*based on Charisma ERP and variable Geometry Solution (modular and flexible).*



# Viteză de decizie

Ușurință în  
introducere date

Conectare cu baze de  
date externe

Sistem eficient de  
decizii



**Web POS**  
**Motor puternic de Scoring/Rating**

# Web POS

CHARISMA

**QUOTES OVERVIEW**  
Review through ordering quotes

NEW QUOTE

Search: [Search] [Filter] [Sort] [Transaction ID]

<b>COLD</b> BUNNICTON (New York)	Quote # 5 087 Total \$20,240	Status NEW	Quote Payment \$ 2,000 Days 30 Payment	Quote Status NEW	Finance Level Monthly Payment \$ <b>508.32</b>	Action NEW VIEW QUOTE
Transaction ID: 1484   Approval/Invoice: 04 Dec 2014   Status: Pending order						
<b>COLD</b> BLIND BAY (New York)	Quote # 5 107 Total \$75,500	Status NEW	Quote Payment \$ 3,000 Days 30 Payment	Quote Status NEW	Finance Level Monthly Payment \$ <b>553.17</b>	Action NEW SALE PRODUCT
Transaction ID: 1489   Customer: 04 Dec 2014   Status: Refused product						
<b>COLD</b> BUNNICTON (New York)	Quote # 5 087 Total \$12,240	Status NEW	Quote Payment \$ 2,400 Days 45 Payment	Quote Status NEW	Finance Level Monthly Payment \$ <b>213.76</b>	Action NEW VIEW QUOTE
Transaction ID: 1484   Approval/Invoice: 04 Dec 2014   Status: Pending order						
<b>WILLIAMSON CO...</b> WILLIAMSON (New York)	Quote # 5 107 Total \$1,000	Status NEW	Quote Payment \$ 100 Days 30 Payment	Quote Status NEW	Finance Level Monthly Payment \$ <b>20.49</b>	Action NEW VIEW QUOTE
Transaction ID: 1497   Approval/Invoice: 03 Dec 2014   Status: Pending order						
<b>GOLD, ADAM</b> BUNNICTON (New York)	Quote # 5 087 Total \$12,400	Status NEW				Action NEW SALE PRODUCT
Transaction ID: 1484   Status: Refused product						
<b>GOLD PROFESSO...</b> BUNNICTON (New York)	Quote # 5 107 Total \$70,500	Status NEW	Quote Payment \$ 2,500 Days 30 Payment	Quote Status NEW	Finance Level Monthly Payment \$ <b>248.34</b>	Action NEW COMPLETE QUOTE
Transaction ID: 1491   Approval/Invoice: 04 Dec 2014   Status: Incomplete quote						

# Score cards (scoring / rating)

The screenshot displays the Charisma ERP Score Card interface. At the top, the title bar reads "Charisma ERP - [Score Card]". The menu bar includes options like File, Warehouse, Finance, Accounting, Purchase, Sales, HR/Rec, Inventory, Project, Quality, Learning, Resources, Billing, Calculation, Reports, Cashflow, Simulation, and Help. Below the menu, there are status indicators for "Score Card", "L1001", "BIT TO BIT", "L1001", "L1001", "L1001", and "L1001".

The main content area is titled "Score Card" and "Score Card Information". It features a "Name" field with "Ciprius Lovers" and a "Description" field with "Ciprius Lovers". There are also fields for "No. of items" (set to 1) and "Total points" (set to 100), along with an "Absolute weighting" checkbox.

A table is displayed with the following structure:

Scale name	Range from value	Range to value
1000000		
1000000	0	1
1000000	-1	-1
1000000	1	1

Below the table, there are three colored buttons: a green "Approve" button, a yellow "Review" button, and a red "Reject" button.

The "Sections" section at the bottom contains a list of items:

- 1 [Operations / Department] Client Lead Information
- 2 [Operations/Dept] Client Business / Financial Information & Transaction
- 3 Financials and pricing
- 4 [Operations/Dept] Billing

- Situatii diverse;
- Operare/decizie din exterior;
- Analiză rezultate pe dispozitive mobile;
- WebPOS funcțional pe dispozitive mobile;
- Primire / execuție task-uri pe mobil;
- BI utilizabil pe mobil;



# Aplicația My Task



# Business Intelligence pe tabletă și telefon



# Multiple documente de gestionat

- Upload / download ușor de realizat;
- Organizare completă a arhivei;
- Acces ușor la documentele salvate;



- DMS extern sau modul în Charisma ERP;
- Acces direct din zonele de lucru în ERP;

# Integrare ERP - DMS

**Checklist**

Item	Side	Partner	Item	Description	Plan	Checked	Collected by
1	Client	INTCO...		Aufftrag (Parallel)		<input type="checkbox"/>	
	Client	ABATT...		Erstellung der ersten 2 Prozess- und Serviceinstanzen...		<input type="checkbox"/>	
	Client	INTCO...		Import-Konzept		<input type="checkbox"/>	
	Client	ABATT...		Übersicht über den Status der Instanzen (SAP-Web, Export...		<input type="checkbox"/>	
				Offizieller System-Import		<input type="checkbox"/>	
				Agreed Finality agreement for this installation		<input type="checkbox"/>	
				Import-Konzept		<input type="checkbox"/>	
				Importieren der ersten Instanz		<input type="checkbox"/>	
				Informations über die Details		<input type="checkbox"/>	

Item ID	Date	Name	Candidate	Software	Business ID	Date Asset	Beta No	Duplex	Phase	Description
1	02.12.2008	Ben-Timothée-Joseph	10000	000-00000	120-00000					FUNCTIONS PUBLICADO...

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