

# TimeLine ERP ENGINEERING

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## THE ERP SOLUTION FOR INDIVIDUAL AND PROJECT MANUFACTURERS

Fully Integrated: Production, CAD Bills of Materials, ODA/SDA, Calculation, Accounts/CA, Purchasing/MRP

Project Management with Milestones

Multistage Bills of Materials in a **Single** Work Order

Visual Rough and Detail Planning, APS

Service Items, Tasks, Calendar and Workflows

Integrated Email and Document Management

Personal Support





TimeLine is likely the most innovative ERP solution for processing operations on the German market. Awarded the 2017 TOP 100 Innovation Prize and the 2016 ERP System of the Year, TimeLine is the ideal platform for medium-sized businesses with flexible operations. TimeLine merges industry-specific ERP functions with an integrated email and document management system, which is able to map all business processes and documents in a single system.

The flexibly adaptable architecture of the TimeLine platform also provides the following:

- Full ERP functionality everywhere via Internet (even without a terminal server),
- Mobile APPs for CRM and machine data recording and
- TimeLine developer for independent adaptations (queries, report generator, statistics, pivots, screen generator for information modules and score cards).

The services and support from the manufacturer include

- a personal contact person,
- adaptations to individual requirements (while preserving release capability) and
- rapid roll-out times and clear implementation costs for commissioning.

TimeLine is the altogether best solution for anyone looking to introduce clear prices in a short time.

## MODULE for Your Core Processes

 **Project Management**  
with Milestones, Documents and Emails

**Tasks and Workflow Management**  
with Planning

**CAD Integration**

 **Multistage Project Orders**  
with Direct Ordering Option

 **Planning**  
Visual Rough and Detail Planning

**External Production**  
Extended workbench

**Merchandise Management**  
Including purchasing and sales, MRP run and drawing management

**Materials Management**  
Bill of Material Management, Purchasing and Supplier Dunning

**Calculation**  
Preliminary, Continuous and Post Calculation

**Partial Invoice Procedures**

**OP Management and Dunning**

## BASIC MODULE

 **Customer Relationship Management (CRM)**  
with Activity Management and Calendar

**Mehrlagerverwaltung**  
chaotische Lagerhaltung

**Logistics and Dispatch**

 **Integrated Document Management**  
(Barcode Detection, Automatic Email Retrieval and Assignment to Customers and Suppliers, Drawing and Photo Management)

 **Calendar**  
for All Employees and CALDAV Support (Thunderbird, Outlook, Smartphone, etc.)

**Integrated Pivot Tool**  
for Flexible Analyses without Having to Resort to Excel

**DATEV or Lexware Interface**

**Graphic Personnel Deployment Planning**  
Including a Holiday Planner and Other Features

**Balanced Scorecard / Management Information System**

## DATA RECORDING

**operating data recording (ODR)**

**machine data recording (MDR)**

**Mobile data recording**

**staff time recording (STR)**

## APPS

**Mobile CRM**  
Customers, Contact Persons and Phone Numbers, Memos, Sales (Including Offline)

**Mobile Factory**  
Status Overview of Orders and Machines

You can find more information at:  
[www.timeline-erp.de](http://www.timeline-erp.de)

# PROJECT MANAGEMENT

## with Milestones, Documents and Emails

Project management provides a clear display of all project records, drawings and documents in a single module (Project Explorer). The Project Explorer combines all elements of a project in a clearly categorised form. Records can be accessed directly from the Explorer by double click.

The 'Projekt Painter' interface displays a project record for 'AU04-41' (Aximax Kulissenschalldämpfung). The left sidebar shows a tree view of project elements including 'Angebot', 'Auftrag', 'Lieferschein', 'Rechnung', and 'Bestellung'. The main area is divided into several sections:

- Referenzen & Stati:** Customer (1009100), Date (20.02.2006), and other project details.
- Termin & Konditionen:** Disposition (9), currency (Euro), and net price (1.030.000,00).
- Texte:** Header and footer text for the document.
- Bel Pos:** A table listing items with their positions, types, quantities, and storage locations.

Pos.-Nr	Pos.-Typ	Artikelnummer	Bezeichnung 1	Menge	Lager
10	Artikelposition	DIV	Heisswasser-Aufbereitung 10 MW	1,00	Lager Solingen
20	Artikelposition	DIV	Ersatzteil-Paket für HW-Aufbereitung	1,00	Lager Solingen
30	Artikelposition	DIV	Schalnkasten und Steuerung	1,00	Lager Solingen

The project can be divided and planned based on milestones, which can be moved using drag-and-drop. In turn, the milestones can be assigned to tasks, which can then be planned in the calendar, etc.

The 'Plantafel' (Gantt chart) shows the project schedule for 'AN01' (Anlage 01) from August 2015 to November 2015. The chart is divided into months and weeks. The milestones and tasks are as follows:

Id	Bezeichnung	Start	End
1	Angebotsphase	Aug 30	Aug 34
2	Vergabe & Verhandlung	Aug 34	Aug 35
3	Zukaufteile	Aug 35	Sep 02
4	Teilefertigung	Sep 02	Sep 16
5	Montage	Sep 16	Oct 02
6	Probetrieb	Oct 02	Oct 09
7	Vor-Ort-Aufbau	Oct 09	Oct 16

The 'Belege' (Documents) interface shows a list of documents for the project. The 'DMS' (Document Management System) tab is active. The document list includes:

ID	Container	Suchwort	Schlagworte	Letzte Änderung	Erstellt	Check-out Benutzer
19	2009	Zeichnung	Users\bgebauer\AppData\Local\Temp		28.04.2017 08:57:31	

Below the list, a technical drawing of a mechanical component is displayed, showing dimensions of 420 and 250.

The project module also has integrated document management, which allows documents (scans, etc.) to be directly assigned to the project



# PRODUCTION and Rough Planning

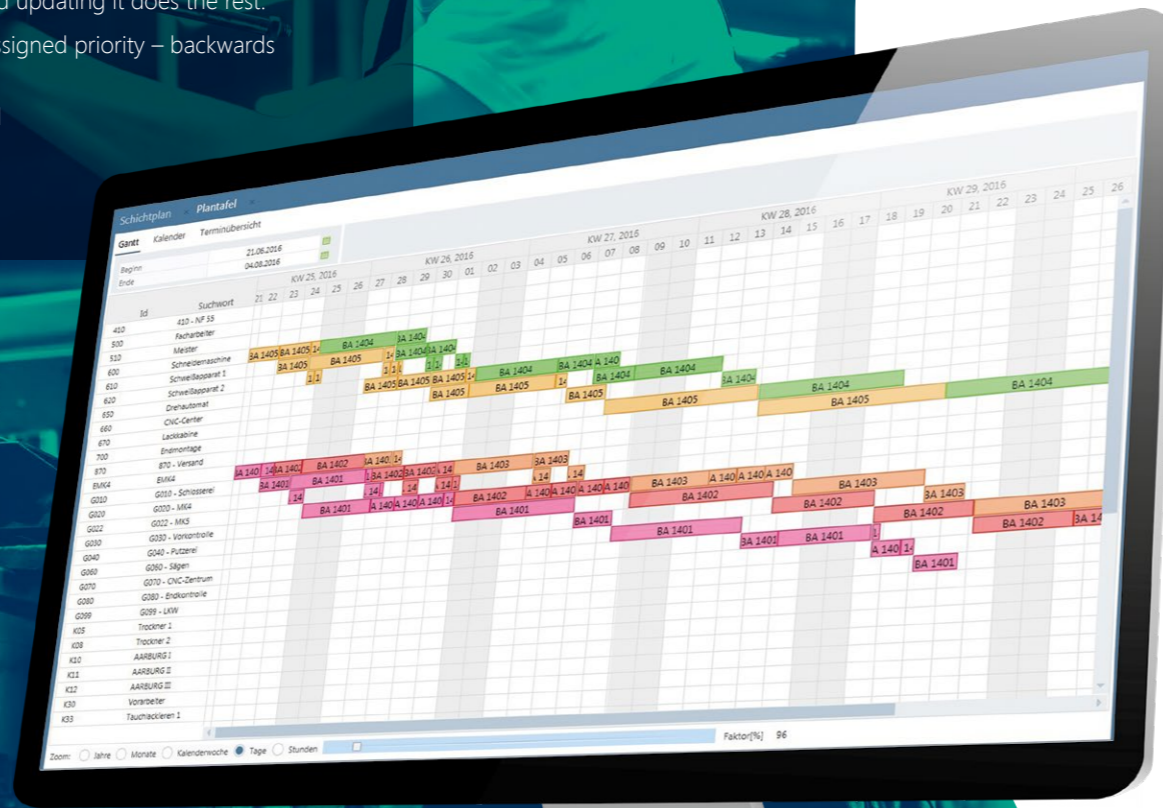
Planning is the core of every production operation – and the weak point of most ERP systems.

At the point where other systems run out of steam, the functional diversity of the production module is only getting started, as TimeLine was created in collaboration with more than 800 industrial businesses in Germany.

Despite the ease of setting it up, the algorithm system provides a pragmatic solution for coordinating the production dates: All production orders are automatically planned by the planning system based on **finite** capacity. To do this, you define your machine (and resources), set up the “shift plan” and give every production order a target date to determine its priority – and updating it does the rest.

It plans all production orders – sorted by your assigned priority – backwards (or forwards) with respect to the target date.

The result is a constantly updated overview of all orders and their final deadlines, along with the capacity utilisation of your machines/resources.



# PRODUCTION and Detail Planning

The detail planning allows you to drag and drop the planned orders to the desired machine/resource in the desired order. At the same time, you are planning each machine/resource in your own calendar.

## Master data

- Bills of material
- Work plans
- Shift plans and resources

## Operating orders

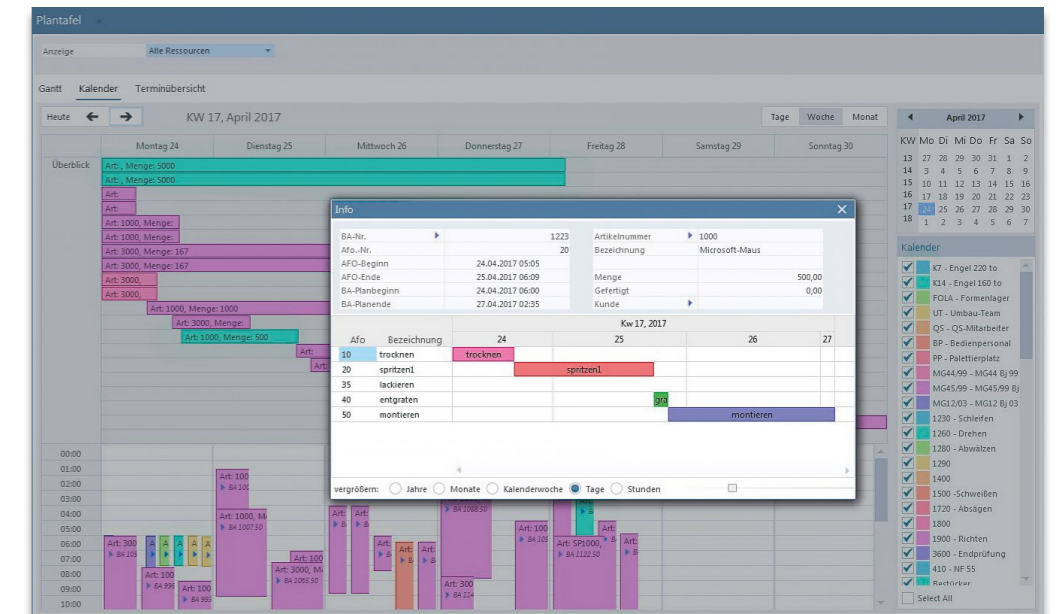
- Option for automatic generation using a production proposal, either manually or by transfer from a customer order to a production order
- Printing routing cards, time tickets, material requisition cards, etc. (adaptable)

## Planning

- Visual planning table
- Planning based on finite or infinite capacities
- Forward and backward scheduling
- Automatic just-in-time updates for planning

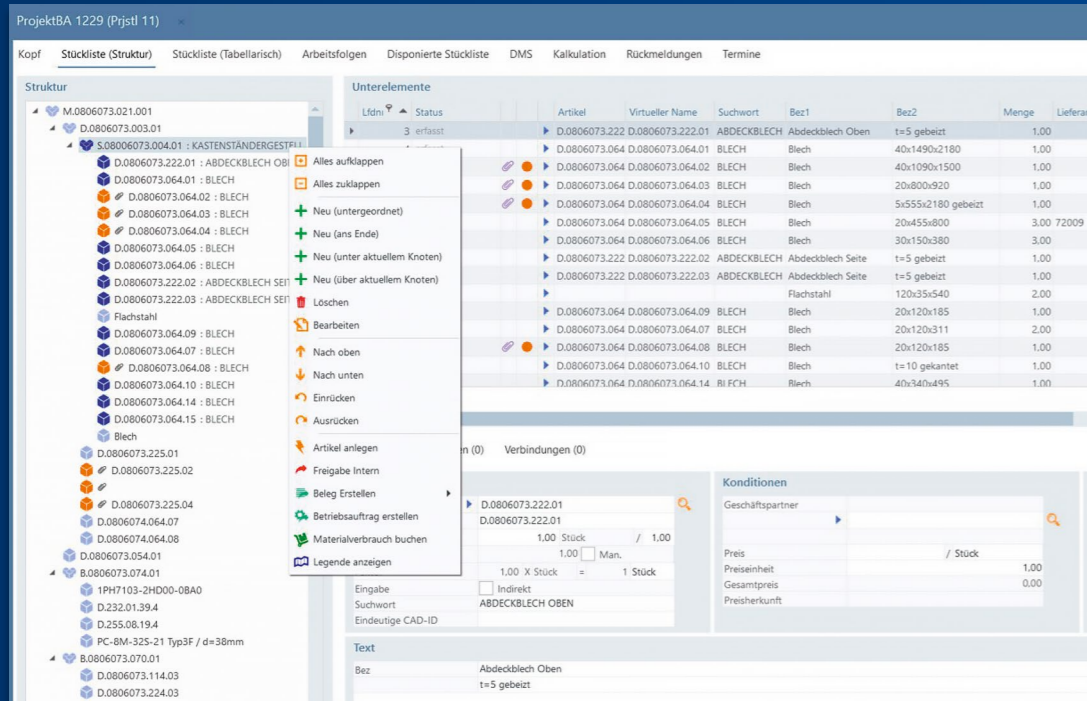
## Feedback

- Time and quantity feedback
- Individual and collective feedback



# MULTISTAGE PROJECT ORDERS

## with Direct Ordering Option



In addition to the multistage linking of work orders, the project work order also provides the option of mapping a multistage assembly of any depth in a single work order.

Via the right mouse menu, it is possible to directly order or request items from the bill of materials – each bill of materials item has a status that is identifiable by colour coding in the bill of materials.

All process sequences are possible, even if the bill of materials item does not have an item number (one-time parts).

Work sequences can be created either as a group or in assembly levels – the entire project work order can also be generated via a bill of materials imported as a transfer from CAD. Prices can also be managed directly from the project bill of materials – clicking on them adds them to the calculation.

# SALES

## and CRM

**Continuous:** From the query to the calculation to the quotation and even to the deadline follow-up – all processes are interlinked:

- Inquiry recording and tracking
- Transferring the inquiry to the calculation, feedback of the calculation values back into the inquiry
- Generation of quotes, either from the inquiry or the calculation
- Automatic follow-up for your quotations
- Fast telephone helpline for questions

**All customer data in one single system – everything at a glance:** Any number of addresses and contact persons for the customer, filing of all contact data such as the phone number, fax number, email address, etc. for the contact person.

**Activities under control:** Management of contact notes, workflow-supported automatic follow-up, opportunity management, setting up distribution lists for mass emails, mass letters, etc.

**Email and document management:**

- Sending emails at a click from the customer master and records
- Email archive / automatic email importing (IMAP and SMTP)
- Mass emails and email campaign management

- Integrated rich text editor with photos, charts, etc. for the integrated preparation of quotations from the system (without diverting via MS Word)

**Calendar and task management:**

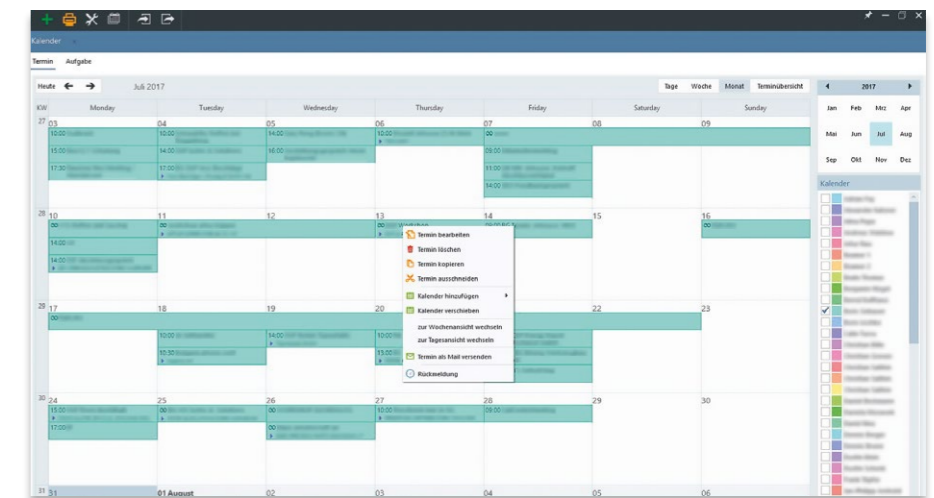
- Calendar management with a CAL-DAV server (bidirectional synchronization of dates with Outlook, iPhone/ smartphones, etc.)
- Task management (e.g. also for APQP / project management)

**Integration of your phone system:**

- Caller ID with a direct jump to the central customer information
- Direct dial by mouse click

**Central customer information:** Correspondence, incoming and outgoing emails, contact notes and follow-up dates, internal records, DMS documents, addresses and prices, history and statistics, outstanding items, delivery backlogs and revenues.

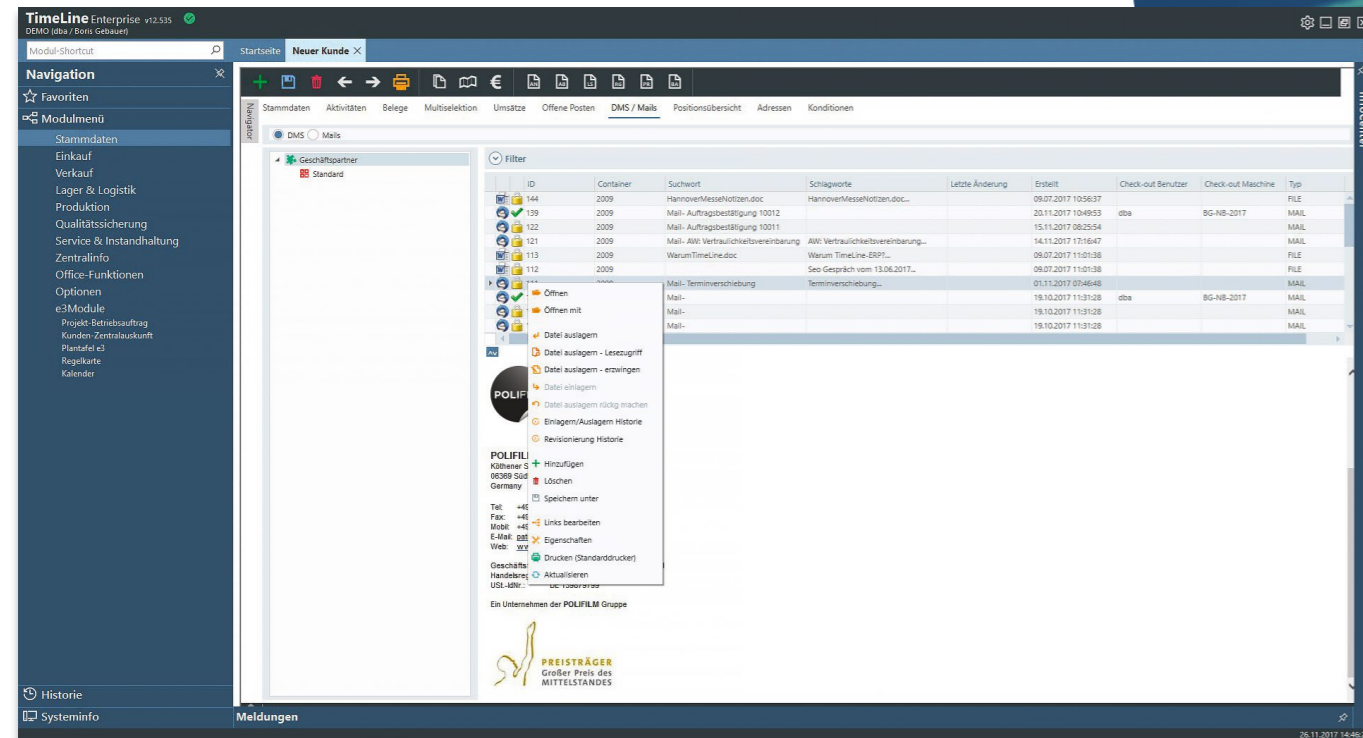
**Archiving:** Printouts are optionally redirected to a PDF archive, e.g. to archive invoices and other records.





# EMAIL AND DOCUMENT MANAGEMENT (DMS)

TimeLine provides you with integrated document management in the ERP system. In addition to linking files with objects in the ERP system, TimeLine DMS also makes it possible to file documents on the DMS server. Adapters ("clients") are available on the user page for Windows File Explorer and for the Outlook and Tobit email systems.



Automatic assignment of your emails to the customer.

## TIMELINE DMS Your Benefits:

- **Email integration:** Automatic importing and selective archiving of incoming and outgoing emails, along with attachments. Incoming emails are automatically identified by the address, imported, indexed by keyword and assigned to the business partner in the ERP system.
- **Audit-compliant archiving:** TimeLine DMS will probably be certified to become an audit-compliant archiving system with version 13.
- **Automatic document importing:** Via *managed directories*, documents in certain directories are automatically added to the DMS and indexed by keyword.
- **Explorer integration:** Any number of files can be copied over to the DMS system directly via Windows Explorer (drag-and-drop).
- **Indexing by keyword:** Documents copied over to the DMS system are automatically indexed by keyword.
- **Barcode OCR:** As an option, barcodes in documents (e.g. PDF, Word, Excel) can be scanned and used for linking them with projects, products, tools, customers, etc.
- **Multiple linking:** The same document can be assigned multiple times. For example, an incoming complaint email can be assigned both to the complaint as well as to the customer and the project.
- **Security:** TimeLine DMS consists of a separate file system that is located on the DMS server. Depending on permission management in Windows, this file system is not accessible from the outside. In this way, you are provided with a protected area for files that are jointly used and organised by assignment to ERP objects – so customers, products, etc.
- **Availability via the web:** Files in the DMS are fully available via the web. Use TimeLine<sup>3</sup> (e3 platform) for web access.
- **Check-out:** Documents can be checked in and out for editing. During check-out, the file is available for editing online or offline. Check-in is used to update the file in the DMS.



# TimeLine ERP ENGINEERING

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