

Enterprise Management Support Systems – Comarch ERP Optima – System Structure

Ireneusz Jędra

University of Radom named after K. Pulaski

Abstract

The article presents the characteristics and structure of the Comarch ERP Optima system along with a description of its basic modules. Its functionality and possibilities of use in managing and controlling the business activities of enterprises of various profiles are described.

Keywords: IT system, module.

1. IT SYSTEMS – INTRODUCTION

Nowadays, every enterprise or company, regardless of size and industry, uses IT systems that support the management and decision-making process to varying degrees and scope.

IT system management is defined as an information system used to support the management process of an economic organisation, implemented using computer (IT) means (Lech, 2003, p. 7).

Whereas information system it is a temporally and spatially separated information processing system, which is a set of purposefully interconnected elements, which are: data sources, methods of their collection and processing, information flow channels, material resources and people performing this processing, and information destinations (quoted after Lech, 2003, p. 7).

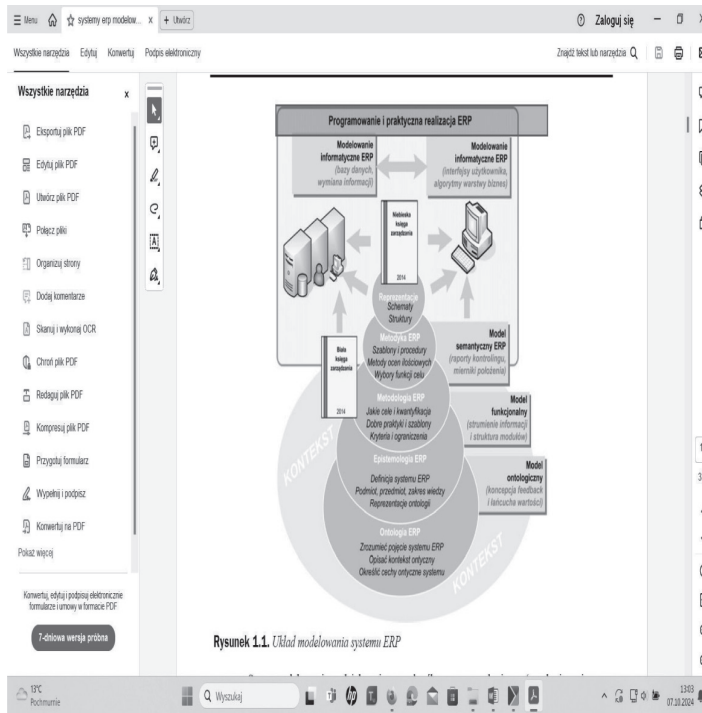


Fig. 1. ERP system modelling system (Gospodarek, 2015, p. 19)

An integrated system is understood as a system in which (Lech, 2003, pp. 7-8):

- the user, using his/her own workstation, is able to run any function of the system,
- users use the same interface throughout the entire system,
- data is entered into the system only once and automatically updates the system status and is visible to all its users.

One of the IT systems currently used in companies for management is Comarch ERP Optima.

This modern enterprise management system allows for the management of multiple warehouses and the monitoring of customer settlements. It complies with current legal regulations and includes built-in support for KSeF and split-payment. Comarch ERP Optima offers numerous modules that can be customised to meet the individual needs and regulations of a given company or enterprise.

Comarch.pl (2025.10.17). *Comarch ERP Optima – company management software.* <https://www.comarch.pl/erp/comarch-optima/>

The most important criteria enabling the optimal selection of an integrated IT system are (Auksztol J. et al., 2020, p. 18):

- compliance with legal regulations,
- system implementation costs,
- improving work in the enterprise,
- quick access to information,
- expected profits,
- data security,
- availability of post-implementation service,
- possibility of exchanging data with the environment.

2. COMARCH ERP OPTIMA SYSTEM STRUCTURE AND BASIC MODULES

The basic modules that can be used by multiple users simultaneously are:

- Trade and warehouse,
- E-Commerce,
- Payroll and HR,
- CRM,
- Bookkeeping,
- Reporting and analysis,
- KSeF,
- Country/Bank,
- Document circulation.

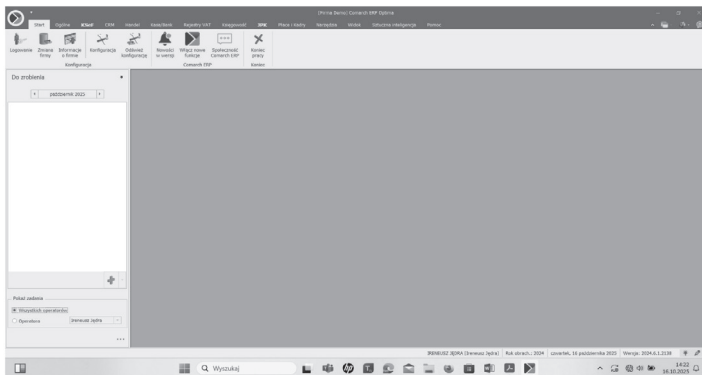


Fig. 2. View of the Comarch ERP Optima system module bar ("Comarch ERP Optima System", 2025 – own work)

2.2 E-Commerce

The Comarch ERP Optima system allows to set up an online store thanks to the Comarch e-Sklep software, while the Comarch e-Sale module allows to manage sales on leading auction portals.

The most important benefits of implementing Comarch online sales software are: Comarch.pl.(2025.10.17). *E-commerce software from Comarch Sales platform for online stores.*

<https://www.comarch.pl/erp/sprzedaz-internetowa/>

- Integration of product data with the ERP system. As a result, data synchronisation between the online store and the company's ERP system is automatic, providing customers with real-time information on product availability. Sellers can easily sell the product range available in the ERP system.
- inventory synchronisation,
- customer database management,
- integration with external wholesalers and product databases,
- orders are settled immediately in the ERP system.

2.3 Human Resources and Payroll

Comarch ERP Optima is an HR and payroll software with dozens of functionalities that enable HR and payroll management. The module offers numerous designed-in features that enable automation and is integrated with the *Platnik* software, enabling settlements with the Social Insurance Institution (*Pl.:* ZUS). Integration with the *e-Deklaracje* system allows for automatic submission of tax returns to the Tax Office (*Pl.:* US).

The program allows to:

Comarch.pl (2025.10.17). *HR and payroll program, HR and Payroll Module in Comarch ERP Optima.*

<https://www.comarch.pl/erp/comarch-optima/place-i-kadry/>

- recording and settling of employees employed under an employment contract taking into account overtime and employee absences,
- settlement of civil law contracts, including those concluded with foreigners,
- settlement of wages taking into account absences, working time, allowances and piecework,
- automatic calculation of the basis for pension and disability contributions for employees on parental leave,

- creating corrections, both for employees and owners, to posted payrolls,
- with the option of retaining the accrued payments in the program in their original form,
- sending payrolls from the HR and payroll database to another database for recording purposes,
- calculation of contributions to the Bridge Pension Fund - in proportion to the number of days calendar days in which the employee performed work in special conditions or of a special nature,
- creating and sending to the Payer application forms and Tax Office settlement declarations for employees and owners along with the required attachments,
- calculating and printing tax returns in accordance with the applicable form templates,
- sending tax returns to the e-Declarations system,
- preparing declarations for PFRON (Wn-D with attachments) and auxiliary printouts for DEK-II and DEK-I-0,
- recording the individual contribution account issued to the payer by Tax Office,
- creating and sending to the Payer application forms and Tax Office settlement declarations for employees and owners along with the required attachments, generating RUD declarations both in the form of an XML file and uploading it to PUE, as well as and in the form of a printout (single for a specified employee or serial for selected employees).



Fig. 4. Screen view of the Payroll and HR module of the Comarch ERP Optima system (“Comarch ERP Optima System”, 2025 – own work)

2.4 CRM

Comarch ERP Optima CRM is a module that allows to plan customer contact channels, record meetings and telephone calls, assign tasks to employees, and configure an email inbox.

The functionality of the Comarch ERP Optima CRM module includes:
Comarch.pl.(2025.10.17). *CRM and service request handling in Comarch ERP Optima*.
<https://www.comarch.pl/erp/comarch-optima/crm-i-serwis/>

- recording customer contacts (customer, date, interlocutor, description of the conversation, conversation time, etc.), as well as scheduling tasks and recording completed activities, automatic generation of task reminders,
- recurring invoices – automatic generation of a set of invoices for multiple entities,
- management of the company mailbox (e-mail/electronic mail, preparation and management of commercial offers,
- the ability to automatically send invoices by e-mail at a given time,
- proposing recurring invoices based on invoices issued in the Trade module,
- the ability to assign tasks to employees and generate cyclical tasks,
- displaying information and reminders about upcoming deadlines for assigned tasks,
- ability to send SMS messages.

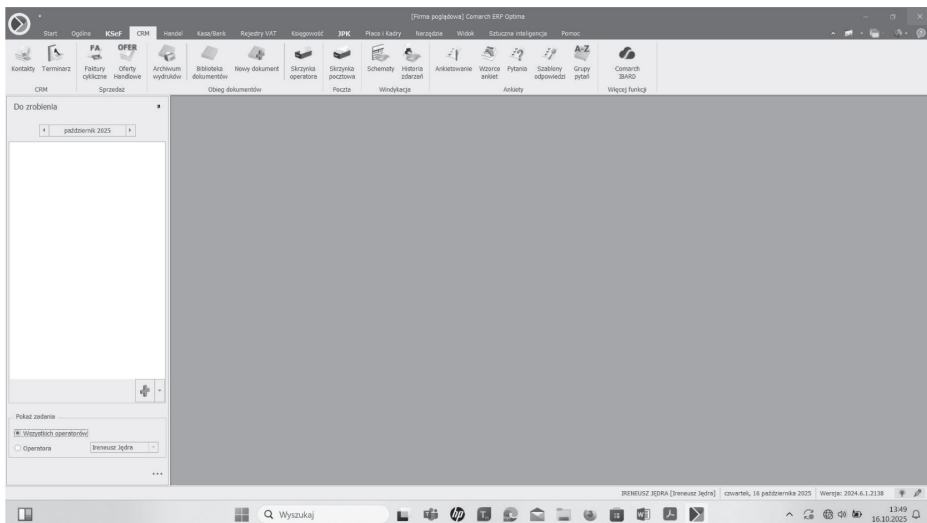


Fig. 5. Screen view of the CRM module of the Comarch ERP Optima system
("Comarch ERP Optima System", 2025 – own work)

2.6 Report and Analysis

The Comarch ERP Optima BI Analysis module enables:

Comarch.pl. (2025.10.17). *Comarch ERP Optima BI Analyses /Business Intelligence/ Analysis Reports.*

<https://www.comarch.pl/erp/comarch-optima/raportowanie-i-analizy/>

- better insight into the company's operations,
- reducing the costs of obtaining analyses,
- verification of the implementation of the company's plans,
- improving the decision-making process,
- saving time.

2.7 National e-Invoice System (Pl.: KSeF) in Comarch ERP

Comarch ERP Opima allows for data exchange with the National e-Invoice System. The tool is built into the ERP system to make communication with the National e-Invoice System intuitive and helped with documentation management in the company.

Comarch.pl. (2025.10.17). *Integration with KSeF in Comarch systems.*

<https://www.comarch.pl/erp/ksef/>

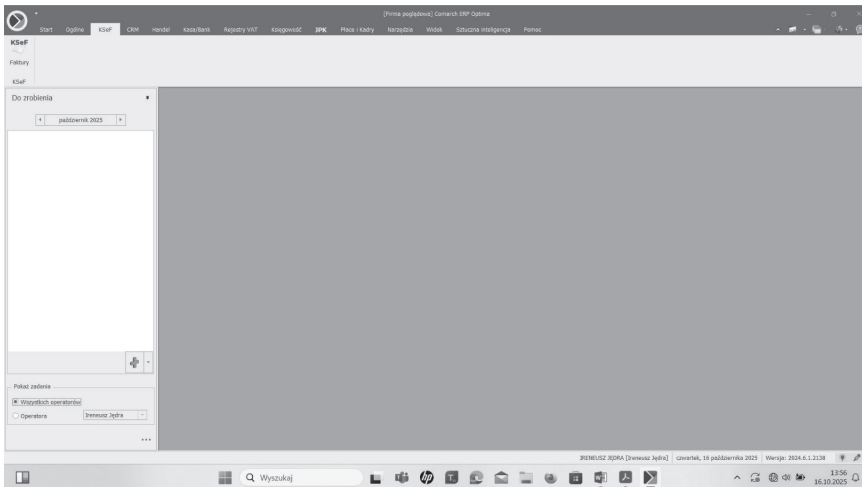


Fig. 7. Screen view of the KSeF module of the Comarch ERP Optima system (“Comarch ERP Optima System”, 2025 – own work)

2.8 Country/Bank

The Cash/Bank module allows to:

Comarch.pl. (2025.10.17). *Cash flow – Cash/Bank in Comarch ERP Optima.*

<https://www.comarch.pl/erp/comarch-optima/finanse-i-przeplyw-srodkow-pienieznych/>

- ongoing control of cash flow in the enterprise,
- collecting information about payments related to registered documents in other modules,
- maintaining any number of cash registers and bank accounts in PLN and other currencies,
- automatic download of NBP rates,
- settlement of documents in different currencies
- automatic creation of exchange rate differences when settling documents in foreign currencies,
- defining any number of payments and assigning them to the appropriate cash/bank register,
- partial settlement of receivables or liabilities,
- generating compensation documents,
- monitoring and debt collection – issuing interest notes, payment reminders and balance confirmations – single or in series,
- serial settlement of documents from the payment estimate,
- matching payments and documents at the invoice payment level,
- preparing a summary of cash receipts and expenditures – those already made (records) and planned (events),
- using the split payment mechanism – MPP,
- settlements with all legal entities – contractors, offices, employees,
- using the Bank Dictionary, to which one can import information about all banks in Poland from files provided by the National Clearing House (Pl. KIR) and the Dictionary of Offices. The Dictionary of Offices – once completed, is available in all Comarch ERP Optima modules,
- verification of bank account numbers in the list of VAT payers,
- downloading a list of contractor's bank accounts from the list of VAT payers.

decision-maker's decision. The choice of a management system often depends on the financial resources available to a given entity, which suggests a more universal system with less adaptability, or a dedicated system with capabilities and functionality tailored specifically to a given enterprise.

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Ireneusz Jędra
University of Radom named after
K. Pulaski, Poland
ORCID: 0000-0002-4357-4771
ireneusz.jedra@urad.edu.pl