Solarkits ERP – ERP Implementation Steps & Phases

Overview

This document outlines the **step-by-step ERP implementation roadmap** for **Solarkits ERP**, covering admin configuration, CRM rollouts, onboarding modules, apps, integrations, and reporting.

Phase 1: Core Admin Setup & Foundation

1. Admin Settings & Master Configuration

Goal: Establish system foundation and governance.

Modules Included

- Product configuration (Solar kits, Product configuration, components, pricing slabs)
- Dealer & Franchisee plan configuration
- Order journey setup (Lead → Order → Delivery → Billing)
- Dealer onboarding & approval workflow
- Franchisee onboarding & approval workflow
- Vendor onboarding module
- Supplier onboarding module

User Logins

- Account Admin (Order management/delivery management)
- Country Admin (Region-wise control)

Key Outputs

- Configured masters
- Approval workflows active
- Role-based access control (RBAC)
  Levels for ERP login
  - Country, State, Cluster

Phase 2: Dealer CRM Rollout

2. Dealer CRM, Dealer Manager & Dealer App Live

Goal: Enable dealer-side sales operations.

Functional Scope

- Dealer lead management
- Quotation & order creation
- Customer onboarding (KYC & site details)
- Order tracking
- Dealer wallet / commission view
- Dealer Manager login (approval & performance tracking)
- Dealer Mobile App (Android / iOS)

Key Outputs

- Dealers live on ERP
- Real-time sales visibility

Phase 3: Franchisee CRM Rollout

3. Franchisee CRM, Franchisee Manager & App Live

Goal: Enable regional franchise operations.

Functional Scope

- Franchisee-level CRM
- Dealer allocation & monitoring
- Regional inventory visibility
- Order & revenue tracking
- Franchisee Manager dashboard
- Franchisee Mobile App

Key Outputs

- Region-wise operational control
- Scalable franchise network

Phase 4: Delivery & Execution

4. Delivery Manager Login

Goal: Manage logistics and installation execution.

Functional Scope

- Order assignment
- Delivery scheduling
- Installer allocation
- Installation status tracking
- Proof of delivery / installation

Key Outputs
- Faster order fulfillment
- Reduced delivery delays

Phase 5: Admin Dashboard & Financial Reports

5. Admin Dashboard & Reports

Goal: Enable management-level decision making.

Dashboards & Reports
- Sales dashboard
- Dealer & franchisee performance
- Profit & Loss (P&L)
- Balance Sheet
- Cash flow
- Order aging & revenue reports

Key Outputs
- Financial visibility
- Business health tracking

Phase 6: Payment Integration

6. Payment Gateway & Financial Integration

Goal: Enable seamless digital payments.

Integrations
- Online payment gateways (UPI, Cards, Net Banking)
- Dealer & Franchisee payouts
- Customer (dealer or franchisee) payments
- Refund & reconciliation
- Invoice-to-payment mapping

Key Outputs
- Automated collections
- Reduced manual accounting

Phase 7: Vendor Onboarding & Operations Apps

7. Vendor Onboarding – Driver & Installer App Integration

Goal: Digitize last-mile execution.

Vendor Types
- Drivers
- Installers

Functional Scope
- Vendor onboarding & KYC
- Job (delivery or installation) assignment
- Route & task tracking
- Delivery or Installation checklist
- Proof of delivery or installation - Photo & signature upload
- Delivery or installer Vendor payout tracking

Key Outputs
- Transparent field operations
- Vendor performance tracking

Phase 8: Supplier & Partner Logins

8. Supplier Logins (Dealer / Distributor / Manufacturer)

Goal: Enable supply chain collaboration.

Functional Scope
- Supplier login access
- PO visibility
- Dispatch & delivery updates
- Inventory & stock updates
- Invoice upload

Supplier Types
- Dealer suppliers
- Distributors
- Manufacturers

Key Outputs
- Improved supply chain visibility
- Faster procurement cycles

Implementation Best Practices
- Phase-wise rollout to reduce risk
- Parallel UAT with pilot users
- Strong training & SOPs
- Data security & audit controls

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