ERP SYSTEM

What is an ERP System?

An organization's essential business operations can be integrated and managed by an ERP (Enterprise Resource Planning) system, a type of software. It enables effective resource planning, data management, and departmental cooperation, allowing firms to automate and streamline their operations.

A typical enterprise resource planning (ERP) system is made up of a core database and a number of connected modules that cover a variety of functional areas, including finance, human resources, manufacturing, supply chain management, customer relationship management (CRM), sales, and marketing. Together, these modules offer a complete picture of the organization's operations and facilitate smooth data exchange and departmental collaboration.

An ERP system's essential attributes include:

A centralized database stores all information, preventing data duplication and guaranteeing data consistency throughout the whole organization.

Integration: The ERP system's many modules are linked together, enabling data sharing and real-time updates between departments.

Automation: Different corporate operations are automated by ERP systems, which decreases manual labor, cuts down on errors, and boosts productivity.

Process and workflow standardization are enforced by ERP systems, assuring consistency and best practices across the organization.

Reporting and Analytics: ERP systems offer a wide range of reporting and analytical features that help firms gather information, monitor performance, and make informed decisions.

Scalability: ERP systems can easily integrate new modules or features because they are made to scale with an organization's growth and changing needs.

ERP systems include security mechanisms built-in to protect sensitive data and guarantee that only authorized workers have access to particular information.

An organization can gain a lot from implementing an ERP system, including increased operational effectiveness, better decision-making, improved cooperation, more customer satisfaction, and total cost savings. To ensure successful adoption and realize the full potential of the system, it's crucial to keep in mind that ERP deployment is a complicated process that calls for careful planning, stakeholder involvement, and efficient change management.

Getting Started with ERP System

ERP Logging In User Roles and Permissions

Open Your Web Browser: Launch your preferred web browser on your computer or mobile device.

Enter the ERP System URL: Type the URL or web address provided by your organization or ERP vendor to access the ERP system's login page.

It could be a locally hosted URL or a cloud-based platform.

Username and Password: Enter your unique username and password.

These credentials are typically provided to you by your organization's IT department or system administrator.

Multi-Factor Authentication (MFA): Some ERP systems may require MFA for added security.

If enabled, follow the prompts to complete the MFA process, which may involve receiving a verification code on your mobile device or using a token generator.

Click "Login" or "Submit": After entering your credentials, click the "Login" or "Submit" button to access the ERP system.

User Roles and Permissions: Once you've logged in, you may have the ability to manage user roles and permissions depending on your role in the organization.

Here's how you can typically do it: Accessing User Management: Depending on your user role (usually an administrator or manager), you may have access to user management functions.

Typically, you will find this in the admin or settings section of the ERP system.

Creating User Roles: You can create user roles based on the specific job functions in your organization.

For example, you might have roles like "Admin," "Accounting," "Sales," or "Inventory Manager."

"Assigning Permissions: Within each user role, you can assign specific permissions.

These permissions dictate what actions and data a user in that role can access or modify.

Common permissions include read, write, edit, delete, and create.

Assigning Users to Roles: Once you've created user roles and defined permissions, you can assign individual users to these roles.
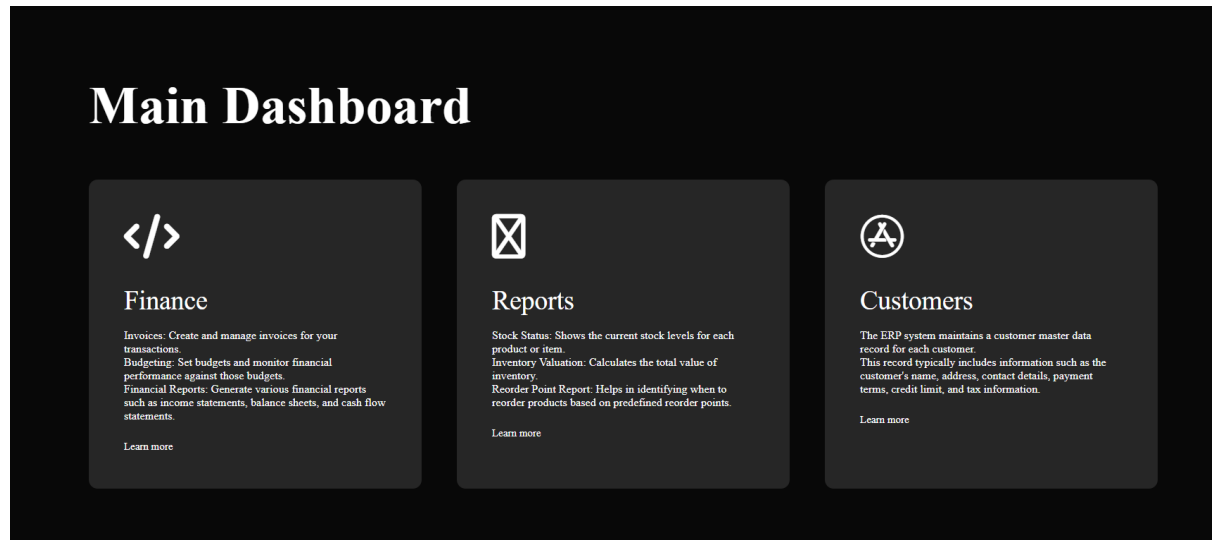
This step involves linking each user to a specific role based on their job responsibilities.

Modifying Permissions: As users' roles or responsibilities change, you can modify their permissions or reassign them to different roles as needed.

Be careful when making changes to ensure users have the necessary access for their tasks without compromising security.
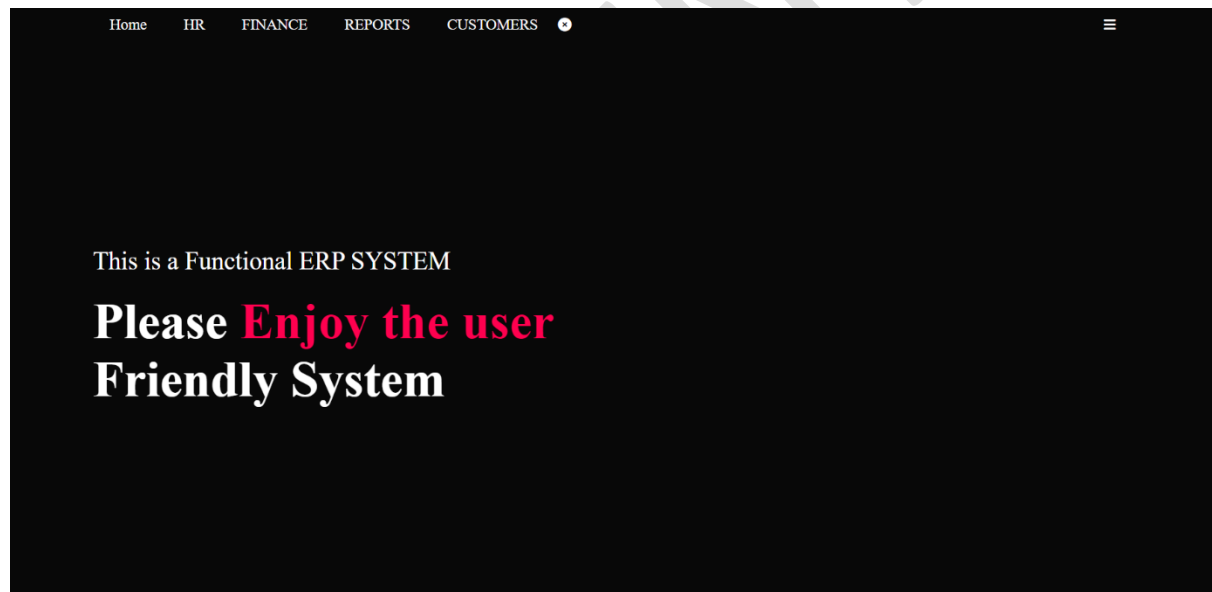
Dashboard

This is the overview of the Dashboard.

Main Dashboard

Finance

Invoices: Create and manage invoices for your transactions.
Budgeting: Set budgets and monitor financial performance against those budgets.
Financial Reports: Generate various financial reports such as income statements, balance sheets, and cash flow statements.

Learn more

Reports

Stock Status: Shows the current stock levels for each product or item.
Inventory Valuation: Calculates the total value of inventory.
Reorder Point Report: Helps in identifying when to reorder products based on predefined reorder points.

Learn more

Customers

The ERP system maintains a customer master data record for each customer.
This record typically includes information such as the customer's name, address, contact details, payment terms, credit limit, and tax information.

Learn more

<u>Navigating the System</u>

<u>Main Menu</u>

Home   HR   FINANCE   REPORTS   CUSTOMERS   ⊗

This is a Functional ERP SYSTEM
Please Enjoy the user
Friendly System

The above is the main menu of the REP System, you can click on any of the menu items and you will be directed to the correct place.

<u>Managing user profile</u>

Updating User Information

Log In: Log in to your ERP system with your username and password.

Access User Management: Depending on your role and permissions, you may need administrative access to manage user profiles. Locate the "User Management," "User Administration," or similar option in your ERP system's menu.

Select User: Identify the user whose information you want to update and select their profile.

Edit User Information: You will typically see fields for various user information, such as name, email address, contact information, and other relevant details. Make the necessary updates.

Save Changes: After making updates, there is usually a "Save" or "Update" button to save the changes. Click this button to confirm the modifications.

Changing Password:

Log In: Log in to your ERP system with your current username and password.

Access Profile or Account Settings: Navigate to your user profile or account settings. This is typically found in the top-right corner of the screen and is labeled as "Profile," "Account," or your username.

Change Password: Look for an option to change your password. This might be labeled as "Change Password" or "Password Settings."

Enter Current and New Password: You will usually be asked to enter your current password for verification and then set a new password. Follow any password complexity requirements provided by your organization.

Save Changes: After entering the new password, save the changes. You may be asked to confirm the new password.

Profile Settings:

Profile settings in ERP systems can vary, but they often include configurations related to the user's preferences and access. Here's how to typically manage profile settings:

Log In: Log in to your ERP system with your username and password.

Access Profile or Account Settings: Locate the "Profile," "Account," or your username in the top-right corner and click on it.

Configure Settings: Inside your profile or account settings, you may find options to configure settings related to notification preferences, language, time zone, and other personalization options. Make the desired changes.

Save Changes: After configuring profile settings, save the changes to apply them.

<u>Working with Modules</u>

Finance:

Invoices: Create and manage invoices for your transactions.

Budgeting: Set budgets and monitor financial performance against those budgets.

Financial Reports: Generate various financial reports such as income statements, balance sheets, and cash flow statements.

Human Resources:

Employee Management: Manage employee records, including personal information, employment history, and performance.

Payroll: Handle payroll processing, including salary calculations and disbursements.

Attendance Tracking: Monitor and record employee attendance and leave.

Inventory Management:

Adding and Managing Products: Add new products to the inventory, update product details, and manage stock levels.

Stock Control: Monitor and control inventory levels to ensure efficient supply chain management.

Sales and CRM:

Creating and Managing Leads: Track and manage potential sales opportunities or leads.

Sales Orders: Create, track, and manage customer orders and sales transactions.

Manufacturing:

Production Planning: Plan and schedule manufacturing operations to meet demand.

Quality Control: Ensure the quality of products through inspections and quality control processes.

Bill of Materials (BOM): Create and manage the list of components and materials required to assemble a product.

Reports and Analytics:

Generating Reports: Generate standard reports, such as financial reports or inventory status reports.

Customizing Reports: Customize reports by selecting specific data fields, filters, and formatting options.

Exporting Reports: Export reports to various formats (e.g., PDF, Excel) for sharing and analysis.

Data Visualization: Use charts, graphs, and dashboards to visualize data and key performance indicators.

Workflow and Processes:

Workflow Automation: Set up automated processes and workflows to streamline operations and reduce manual tasks.

Approval Processes: Implement approval workflows for actions like purchase requests or leave applications.

Notifications: Configure notifications to inform users of important events, pending approvals, or system updates.

Glossary

C

CRM (Customer Relationship Management): A system or approach used to manage interactions with customers, including sales, marketing, and support activities.

CSV (Comma-Separated Values): A file format used for data storage and exchange, where data values are separated by commas.

Customization: The process of modifying an ERP system to meet the specific needs and requirements of an organization.

D

Dashboard: A visual display of key performance indicators (KPIs) and important data for users to monitor and analyze.

E

ERP (Enterprise Resource Planning): A comprehensive software system that integrates and manages various business processes, including finance, human resources, inventory, and more.

H

HRM (Human Resource Management): The set of processes and activities related to managing an organization's workforce, including hiring, onboarding, payroll, and performance management.

I

Inventory Management: The process of overseeing and controlling an organization's inventory, including ordering, storing, and tracking stock levels.

P

PO (Purchase Order): A document issued by a buyer to a seller to request the purchase of goods or services.

Procurement: The process of acquiring goods and services, often involving purchasing, sourcing, and supplier management.

Q

Quality Control: The process of ensuring that products meet specified quality standards through inspections and testing.

U

User Role: A defined set of permissions and responsibilities assigned to a user within an ERP system.