ERP Workflow Documentation

Comprehensive guide to the ERP system modules, processes, and role-based access control

9 User Roles | 6 Modules

Document Contents

Estimations and Project Schedule

Workflow for converting leads to projects with approval workflows

1 Lead Creation

Site Supervisor creates a new lead with required fields: Name, Location Details, Budget, Working Hours, and Manpower Count.

Supervisor

1. Sales engineer and/or estimation engineer creates the lead. Site supervisor is not involved.

2 Approval Request

Complete leads are submitted for dual approval from Accounts and Management departments.

Manager | Accounts

3 Project Conversion

Upon approval, the lead is converted to a project and assigned to a Site Engineer.

Admin | SuperAdmin | Manager | Supervisor

4 Revision Management

Accounts department handles multiple levels of price revisions throughout the project lifecycle.

Accounts

2. Accounts department is not involved in making revisions to quotations. Such a point was not discussed during our meeting. The estimation engineer itself makes revisions and sends to management for approval.

Lead Creation
Dual Approval
Project Conversion

Purchase Management

Workflow for purchase orders, vendor quotes, and delivery tracking

Role Access Matrix

SuperAdmin
- Full access to all purchase orders
- Override approvals
- Vendor management

Admin
- View all purchase orders
- Manage vendors
- Approve/reject orders

Site Engineer
- Create purchase orders
- Manage vendor quotes
- Track deliveries

1 Purchase Order Creation

Site Engineer creates PO with project reference, product type, supplier selection, and leftover inventory consideration.

3. Site engineer/site supervisor sends material request to the store/inventory. Storekeeper cross-checks with existing inventory and forwards the unavailable items to the purchase department. Purchase executive creates PO(Purchase Order).

2 Vendor Quote Collection

Multiple vendors respond with quotes. Site Engineer selects the preferred quote.

4. Vendor qoute collection is done before creating a PO.

3 Approval Workflow

Selected quote sent for dual approval from Management and Accounts departments.

4 Order Fulfillment

After approval, order sent to vendor. Delivery status updated upon receipt.

Inventory Management

5. Inventory module needs to be discussed again.

Material classification, store management, and asset tracking

Material Types
Store Management
Asset Tracking

1 Material Operations

Inventory Managers add materials with details (unit, type, brand), set reorder levels, and optional expiry dates.

Inventory Manager

2 Store Operations

Create multiple stores by location/project, assign storekeepers, manage leftovers, and generate reports.

3 Asset Management

Add company assets, assign to projects or employees, track history, and manage returns/transfers.

4 Goods & Services

Manage vendor relationships, create purchase entries, track deliveries and payments, and log service requests.

HR Operations Management

Recruitment, employee management, and document handling workflows

1 Job Management

HR personnel create, edit, and manage job listings. Candidates apply with details (name, contact info, etc.).

HR

2 Candidate Processing

Update candidate status (Interviewing, Accepted, Rejected). Automatically send offer letters or rejection emails.

6. In order to achieve this, a job seeking candidate should apply on our ERP right?

3 Employee Onboarding

Generate employee codes, upload documents, and track training, insurance, and medical checkups.

4 Attendance Management

Daily attendance is captured and monitored by HR, with validations from assigned project supervisors.

Site Supervisors

7. Attendance of site employees are not captured by HR. It is done by the site supervisor (WB asked for attendance capturing method to be suggested by SNG)

5 Leave Management

Site Engineers create leave requests requiring dual approval from HR and Management.

Site Engineer

8. Leave request is not limited to site employees. All team members must be able to apply for leave through ERP. Site employees' leaves may be applied through site engineers.

6 Document Generation

HR generates and distributes documents (Salary Slips, Experience Certificates) with one click.

Job Creation
Candidate Processing
Onboarding

Accounts Management

Financial tracking, payment management, and approval workflows

Role Access Matrix

SuperAdmin
- Full financial oversight
- Override approvals
- Configure limits

Admin
- View transactions
- Manage workflows
- Generate reports

Account Managers
- Approve requests
- Track finances
- Manage payments

1 Financial Tracking

Track project-specific income/expenditures. Categorize all transactions (materials, labor, services).

2 Payment Management

Maintain payment histories with attached proofs, bills, and receipts for each transaction.

3 Approval Workflows

Set financial limits per role and manage approval workflows for purchases/expenditures.

4 Vendor Payments

Update payment statuses and automatically notify vendors when payments are approved.

Utility Modules

Document, credential, and vehicle management with expiry tracking

1 Document Management

Centralized storage for company documents with version control and access permissions.

2 Credentials Management

Secure storage and management of credentials with role-based access controls.

3 Vehicle Management

Track company vehicles, manage documents, and receive expiry notifications.

4 Expiry Tracking

Monitor expiration dates for documents and credentials with automated notifications.

5 Notification System

Automated alerts for deadlines, approvals, and important system events.

Documents
Credentials
Vehicles

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