MERAKI STORES ERP SYSTEM

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Meraki Stores ERP Operations Summary

Introduction

- *ERP application has been designed and developed for **Meraki Stores** to handle its business orders efficiently.*
- *The main aim of the system is to bring the existing workflow processing system online and store information efficiently and securely.*
- *This can be used later for reviewing, tracking and analyzing the business model further for better customer experience.*
- *Frequent terminology encountered during the lifecycle processing includes Enquiry, Enquiry Requirements, Enquiry Quotations, Order, Purchase Order, Tech Pack, Proforma Invoice, Advance Payments, Full Payments, Vendor Payments, Delivery Challan, Tax Invoice.*
- *Enquiry will be created in the system whenever any order is to be taken up. All the details required are captured as part of enquiry requirements.*
- *Once all requirements are received, quotation price details are entered into the system and quotations are generated. There might be chances of generating the revised quotations too at times.*
- *Once a quotation is accepted, order is created on top of quoted price and customer is confirmed with on the order details.*
- *Then purchase order to the respective vendor is created and order is confirmed to the production.*
- *Production team will give frequent updates and details about order delivery.*
- *Finally, the order is delivered to the customer.*
- *The application automates the entire order processing stages, stores all the information and displays when required in future.*
- *Analytics will also be done on the data and can be useful for making important decisions and drawing out insights based on data trends.*

Current System

- *Currently at Meraki, Order processing is done manually by the team. Traditional file-based data storage approach is used where information is captured in Word documents, Excel sheets, Google sheets etc.,*
- *This is consuming lots of manual efforts and at times error prone too.*
- *To avoid these situations and overcome manual efforts, highly secured web application has been designed which brings the entire system online and provides an efficient way of handling enquiries and orders and better tracking of order status at respective stages in the order lifecycle.*
- *All the manually done documents such as quotations, proforma invoice, payment receipts, tech pack, delivery challan, tax invoices, purchase orders are generated online now and efficiently without any errors.*
- *The web application completely minimizes the manual efforts and provides great reliability and source of information for future orders and allows people to focus more on business to get more orders.*
- *Moreover, all the information can be reviewed, and cross checked at a later point of time for making business critical decisions.*

Functional Description

- *Full Requirements for Meraki Stores ERP Web Application.*
- *The entire data for Meraki Stores ERP suite can be categorized under two sections.*
- *The Primary section is referred to as the Master Data which the system needs before proceeding with any orders.*
- *Primary data refers to the Product Catalog Features and Customizations Details, Vendor Details in the system, Users of the ERP application.*
- *The other kind of data is the transactional data which gets accumulated every day specific to enquiry or order detailing.*
- *Following are the high-level set of terminologies encountered during the order processing and each one of them have their own lifecycle.*
    - *Enquiry*
    - *Enquiry Requirements*
    - *Quotations*
    - *Orders*
    - *Admin Orders*
    - *Production Orders*
    - *Purchase Orders*
    - *Product Catalog Suite*
    - *Vendor Management*
    - *User Management*
    - *Task Management*

- *Following are the set of documents that are expected by the system to generate once all relevant information is filled in by the user.*
    - *Quotations*
    - *Revised Quotations*
    - *Proforma Invoice*
    - *Tech Pack*
    - *Customer Payment Receipt*
    - *Purchase Order*
    - *Delivery Challan*
    - *Tax Invoice*

User Community Description

- *Sales Team, Admin Team and Production Team are the set of users interacting with the system to add/update/retrieve information in the system.*
- *Initially sales team and admin team are the set of users responsible for interacting with the system and come up with any changes and later will be extended to wide variety of users.*
- *Admin can any time add a user, update user details, delete user from the system and can perform all variety of actions.*
- *Users won't be deleted permanently from the system. Once a user has been removed from the list by the admin, they would have the last date enabled and the details would be moved to a separate schema.*
- *This is just to have a track of all the users who worked on the ERP application.*

High-Level Architecture

- *The ERP application is a custom-built web-based application which tracks the different stages of order lifecycle at Meraki Stores.*
- *Major application components include Enquiries, Orders, Admin Orders, Purchase Orders, Product Catalogs, Vendors, Quotations, Invoices, Delivery Challans and few other documents indicating the merchandise details.*
- *The system collects and manages the everyday data related to the orders/enquiries and presents to the user when required.*
- *The application brings a lot of flexibility in using and maintenance of system. All the business activities, everyday tasks, user management is being handled by the system.*
- *The system has a browser-based web interface where users would be interacting every day.*
- *The web application is hosted on the Go Daddy Domain – **https://www.meraki.store/erp/dashboard***
- *Maintenance of the current system involves a set of activities to be done at periodic intervals of time. They've been documented under a separate heading.*

Modes of Operation

- *ERP application is a critical application to a business as it manages day to day activities in a business and operations must be handled very carefully.*
- *We will be having two different environments for the system.*
  - *Development Environment*
  - *Production Environment*
- *Development environment is for daily development and testing purposes a developer needs and first level entry for testing the new code in the application.*
- *Production Instance is the final one which the team at Meraki Stores would be using daily.*
- *Every day application data backups and database backups are to be done and saved to some location.*
- *These backups are very much necessary and failure to do so will have a great chance of havoc in case if there are any issues and production systems doesn't respond.*
- *Emergency data recovery activities would be conducted once in every two months to cross verify whether we're able to recover all the data using the latest backup files and issues faced during these stages must be well documented and noted for the future use.*

Maintenance Activities

- *ERP application is mostly related to business and various activities undergoing in the business and maintenance plays a critical role because this is very different from a normal website which would be done for digital marketing.*
- *Proper and regular maintenance of the application is needed as data grows day to day in these kinds of applications and to be maintained effectively.*
- *As the data grows, performance issues might occur in few pages, pages take more time to load etc.,*
- *Developer needs to document down all the issues and work on them for a better user experience and ensuring that no data or web page is broken.*

- *As part of maintenance activity, the overall responsibility of updating and operating the site is being taken care by the support team so that people working under different user community groups such as sales, marketing, admin and other teams can focus on what's important to them.*

Weekly Tasks

- *All the pages on the web application are loading without any errors.*
- *Application and Database backups are to be performed regularly and stored off site.*
- *Update core software in case of any adhoc requests or if any issues needs to be handled.*
- *Ensuring that all the forms on the page are working correctly.*
- *Check for broken links.*
- *Check for 404 Not Found errors and resolve these by fixing links.*

Monthly Tasks

- *Check for website loading speed. Performance is one of the critical factors we have as part of this web application.*
- *Data is increased every day as more orders needs to be entered into the system and sometimes loading all the data and wait till the page gets loaded often gets irritation among the users as they'll have to wait for the same. Necessary decisions need to be taken by the team to handle this.*
- *Performing security scans and resolve if any issues are identified.*
- *Monthly reports are to be prepared and analyzed which includes errors such as broken links, server errors, timeout errors, empty titles, duplicate titles and other kind of errors that the team might face while using the web application.*
- *Perform data analytics and derive some visual representations out of it which will be very helpful in making business decisions.*

Quarterly Tasks

- *Review the product catalog features and other master data content on the site.*
- *Testing the website to ensure that it looks and displays properly on most popular browsers.*
- *Periodically checking the backup logs and performing emergency web application recovery activities.*

Yearly Tasks

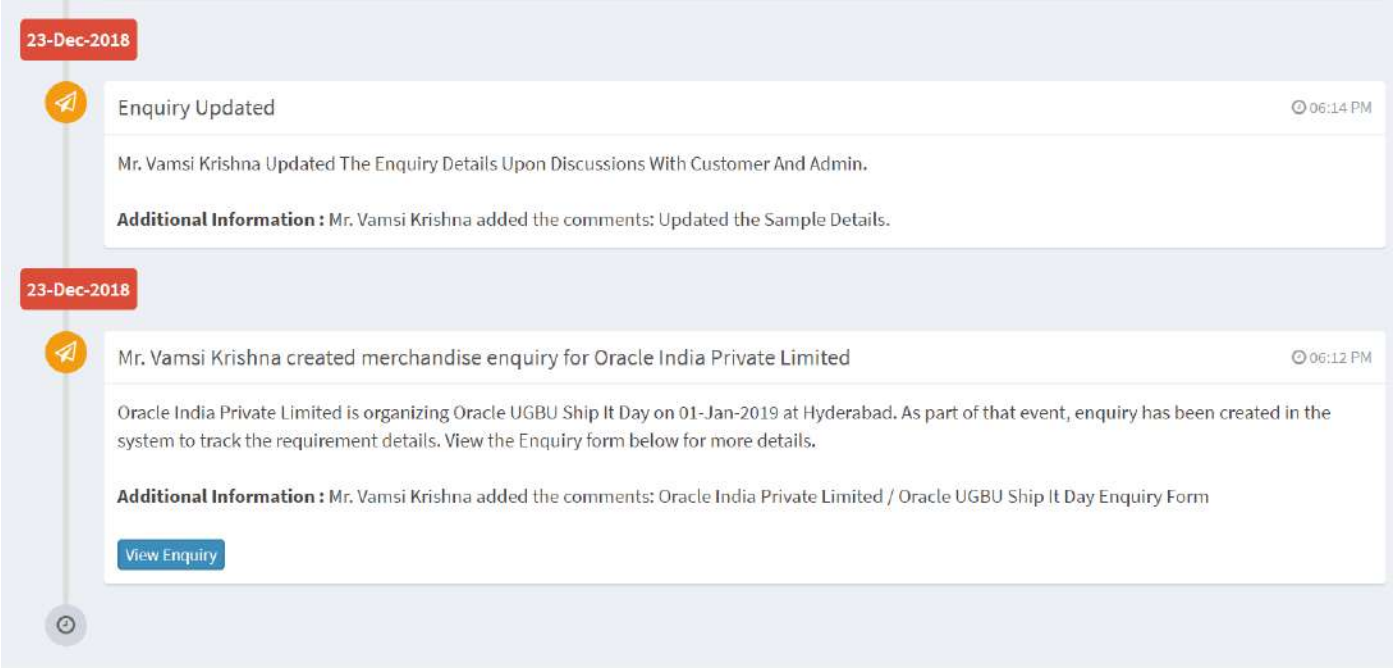
- *Review each page on the site for content accuracy.*
- *Renew the web application domain name.*
- *Review whether the ERP application is in align with your business goals.*

Data Analytics Activities

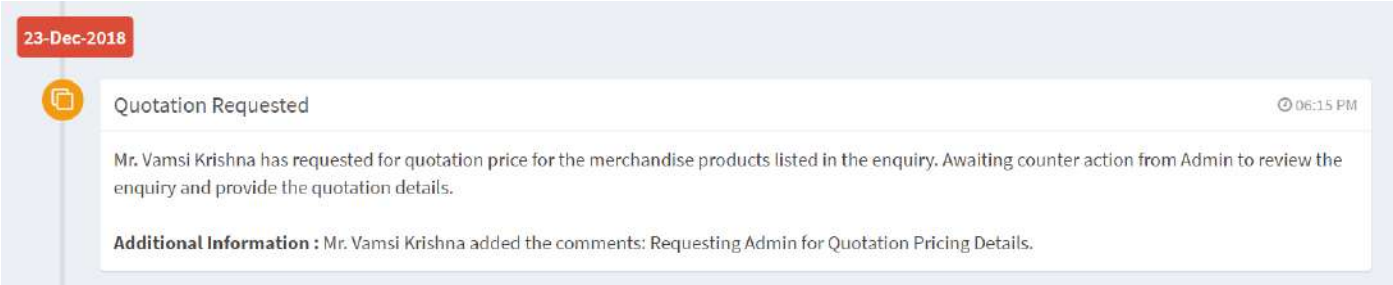
- *As data grows very frequently, we can use the data and perform analytics to get insights from the business and accordingly take business decisions.*
- *We need to come up with different areas where we want to analyze and come up with a plan on how we want to analyze and take business decisions.*
- *This is something to be done in the long run when we have enough data to perform statistics and analytics.*

Order Lifecycle Stages

Enquiry – IN PROGRESS

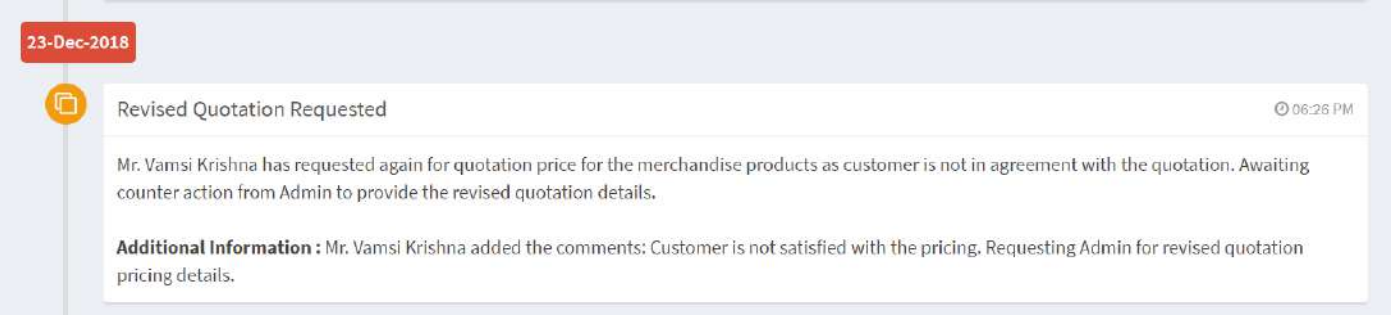


Enquiry – REQUEST FOR QUOTATION



Enquiry – QUOTATION GENERATED

Enquiry – REQUEST FOR REVISED QUOTATION



Enquiry – REVISED QUOTATION GENERATED

Enquiry – APPROVED

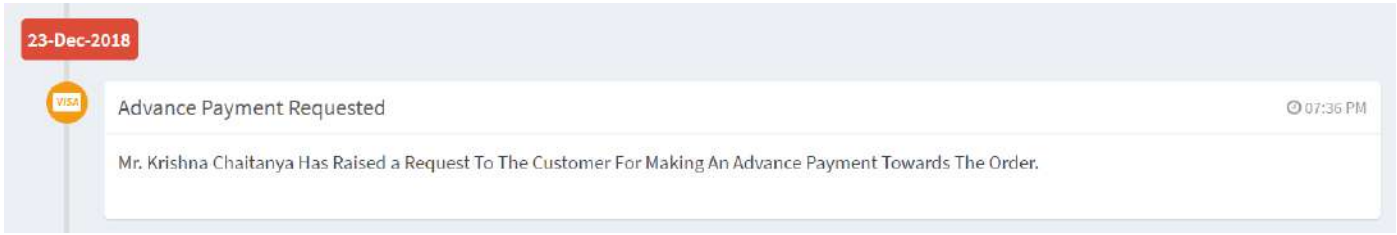
Order – REQUEST FOR ORDER CONFIRMATION

Order – ORDER CONFIRMED

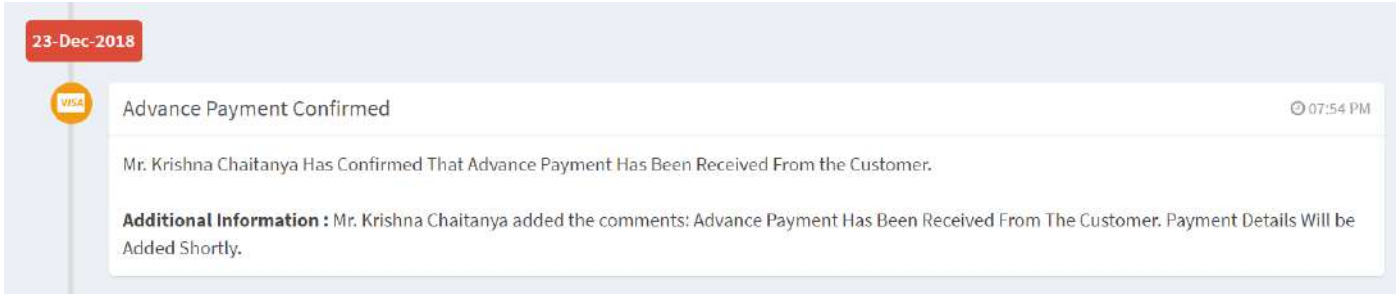
Order – PROFORMA INVOICE GENERATED

Order – TECH PACK GENERATED

Order – REQUEST FOR ADVANCE PAYMENT



Order – ADVANCE PAYMENT CONFIRMED



Order – ADVANCE PAYMENT RECEIPT GENERATED

Order – PURCHASE ORDER CREATED

Order – ORDER SENT TO PRODUCTION

Order – REQUEST FOR PRODUCTION SAMPLES

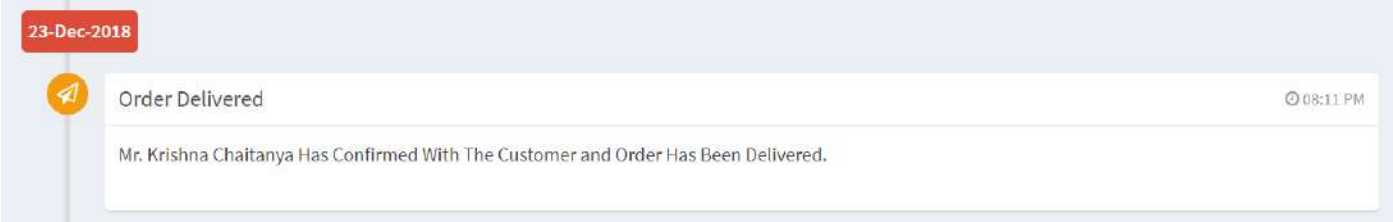
Order – REQUEST FOR REVISED PRODUCTION SAMPLES

Order – PRODUCTION BULK PRINTING CONFIRMED

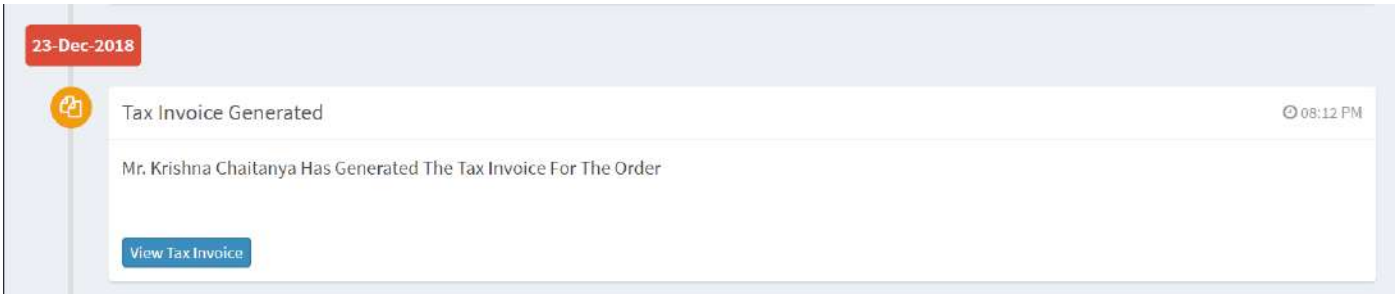
Order – ORDER SHIPPED

Order – DELIVERY CHALLAN GENERATED

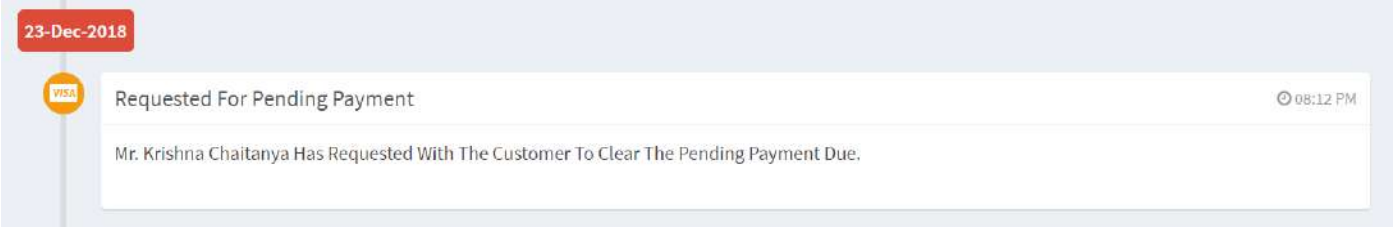
Order – ORDER DELIVERED



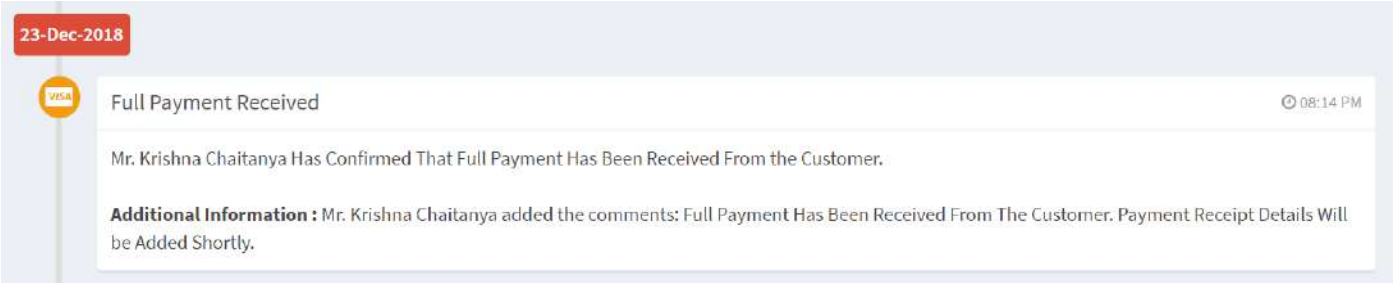
Order – TAX INVOICE GENERATED



Order – REQUEST FOR PENDING PAYMENT

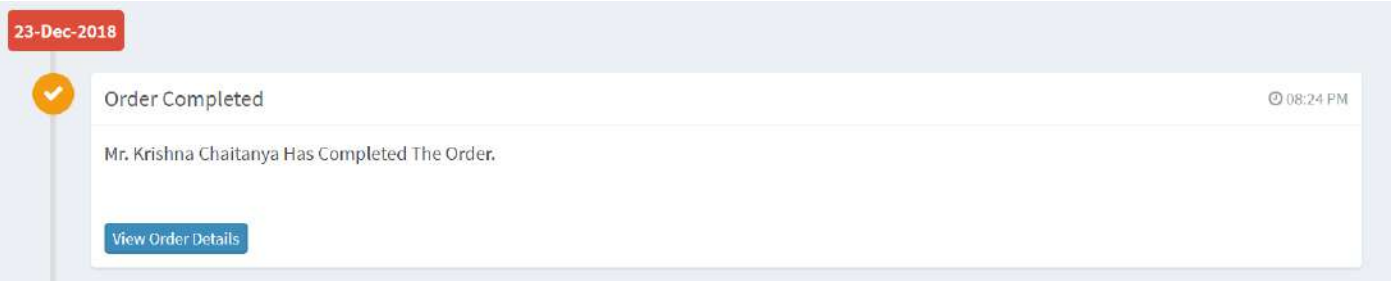


Order – FULL PAYMENT RECEIVED



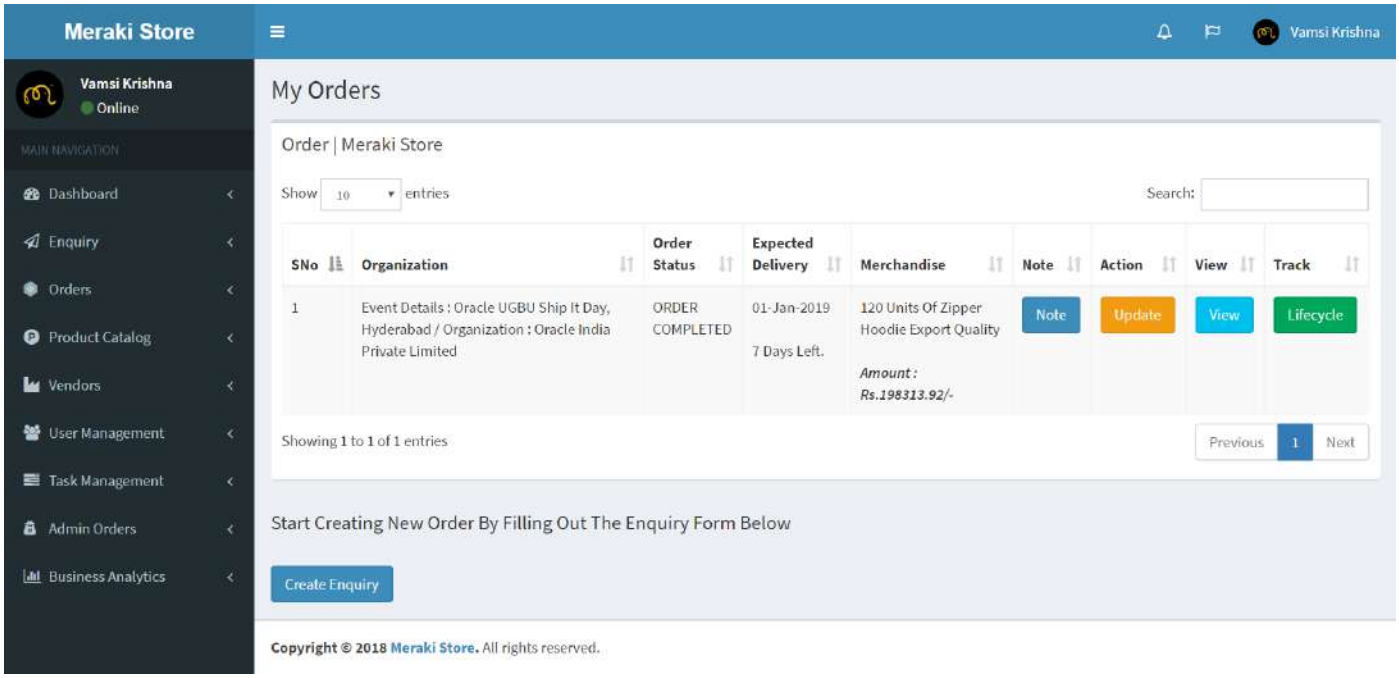
Order – FULL PAYMENT RECEIPT GENERATED

Order – ORDER COMPLETED

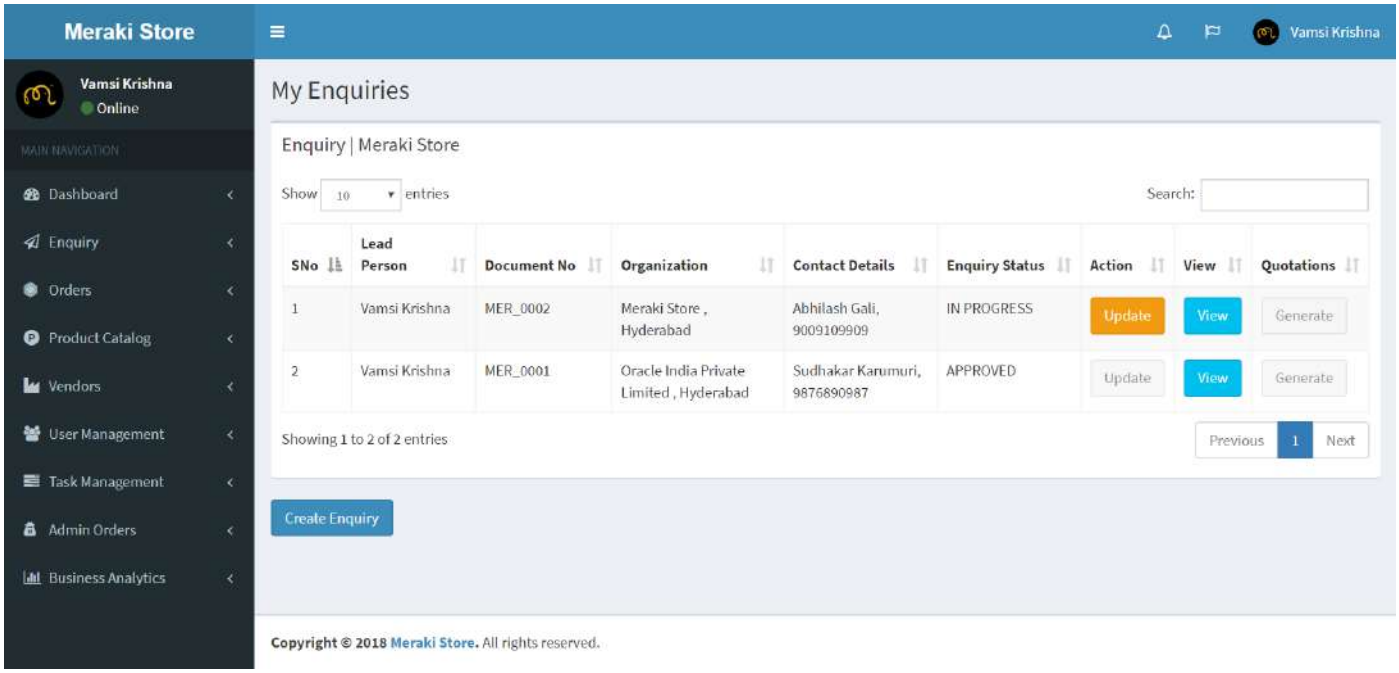


ERP Application Details & Screenshots

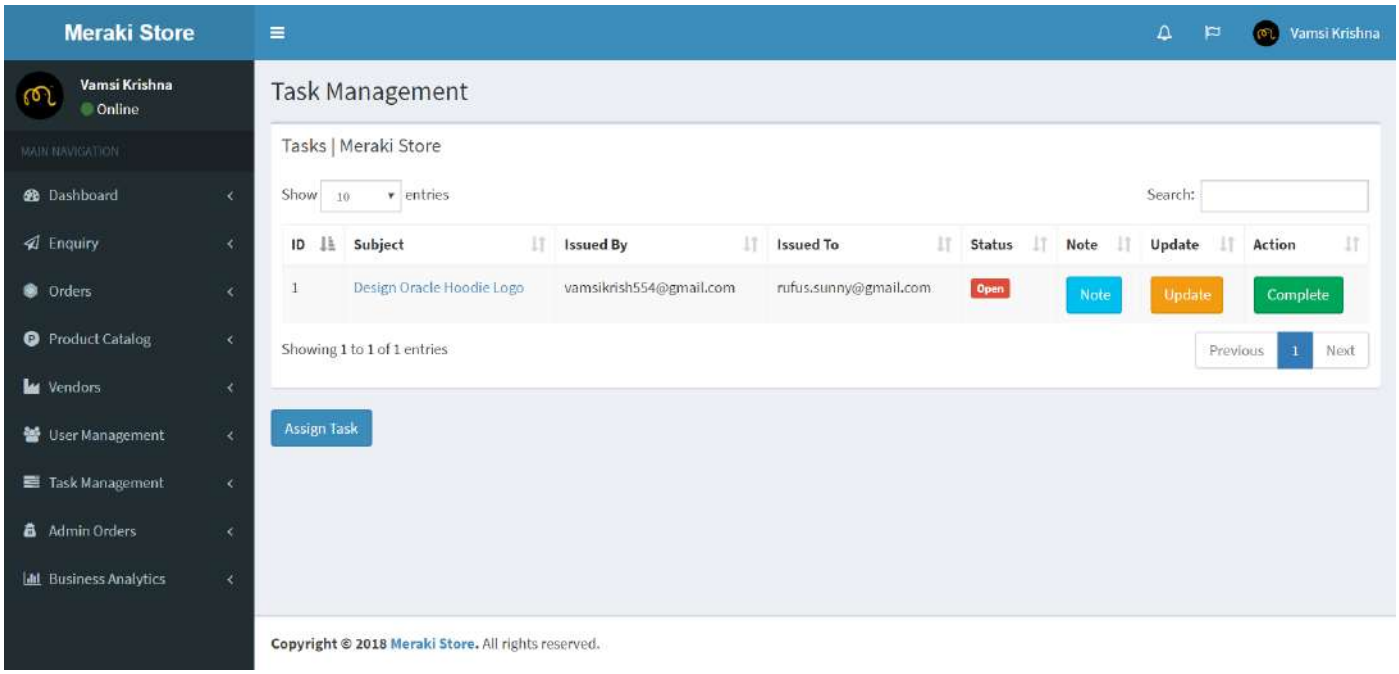
My Orders



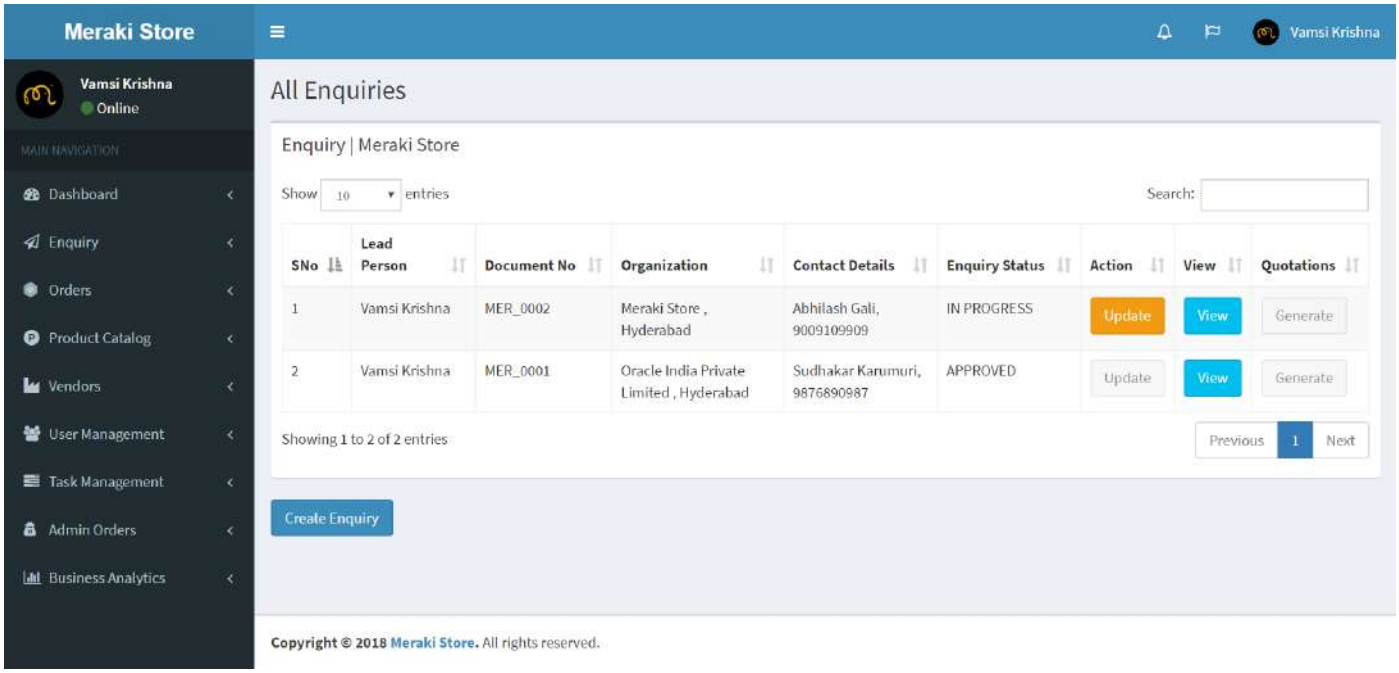
My Enquiries



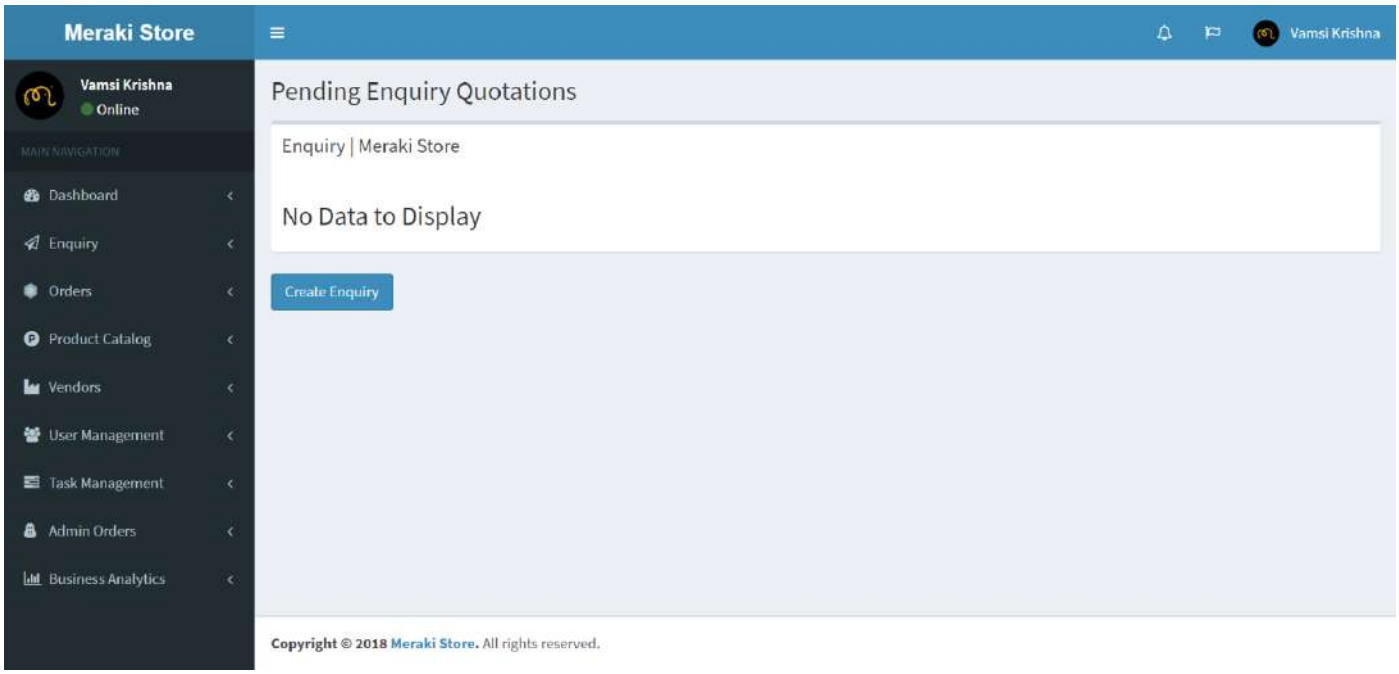
My Tasks



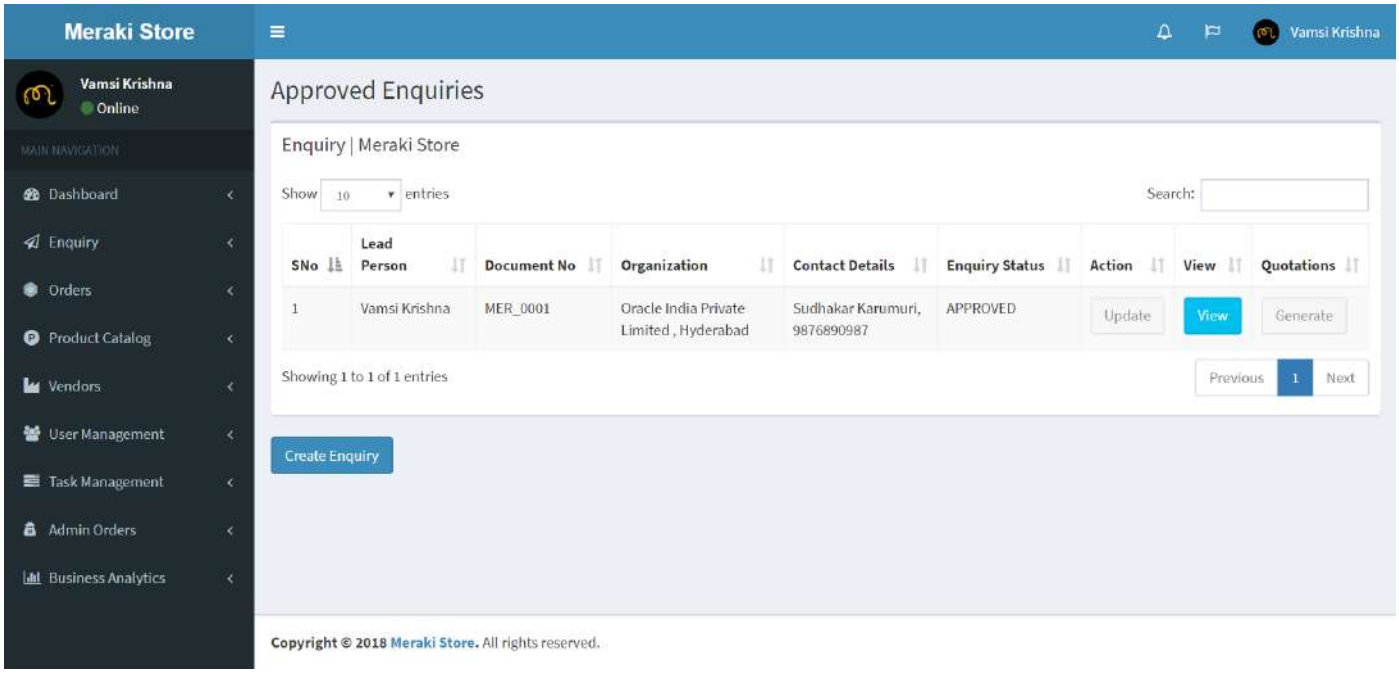
All Enquiries



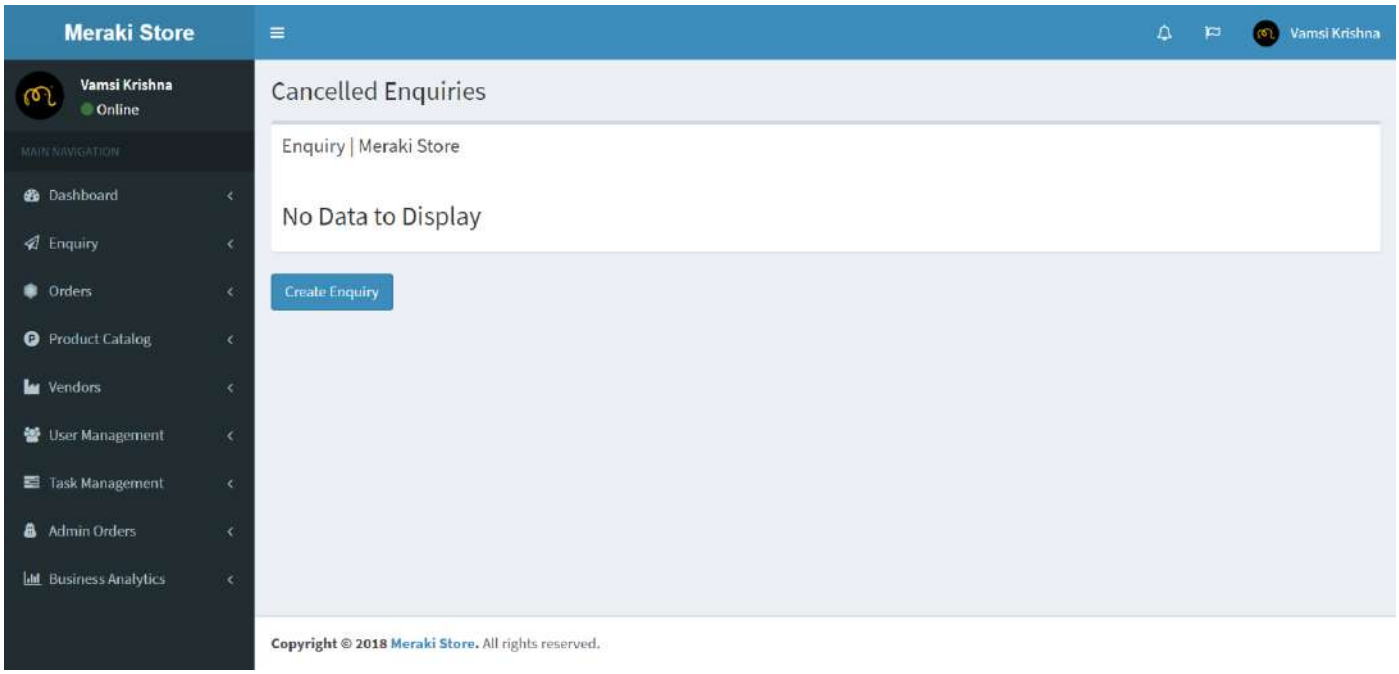
Pending Enquiry Quotations



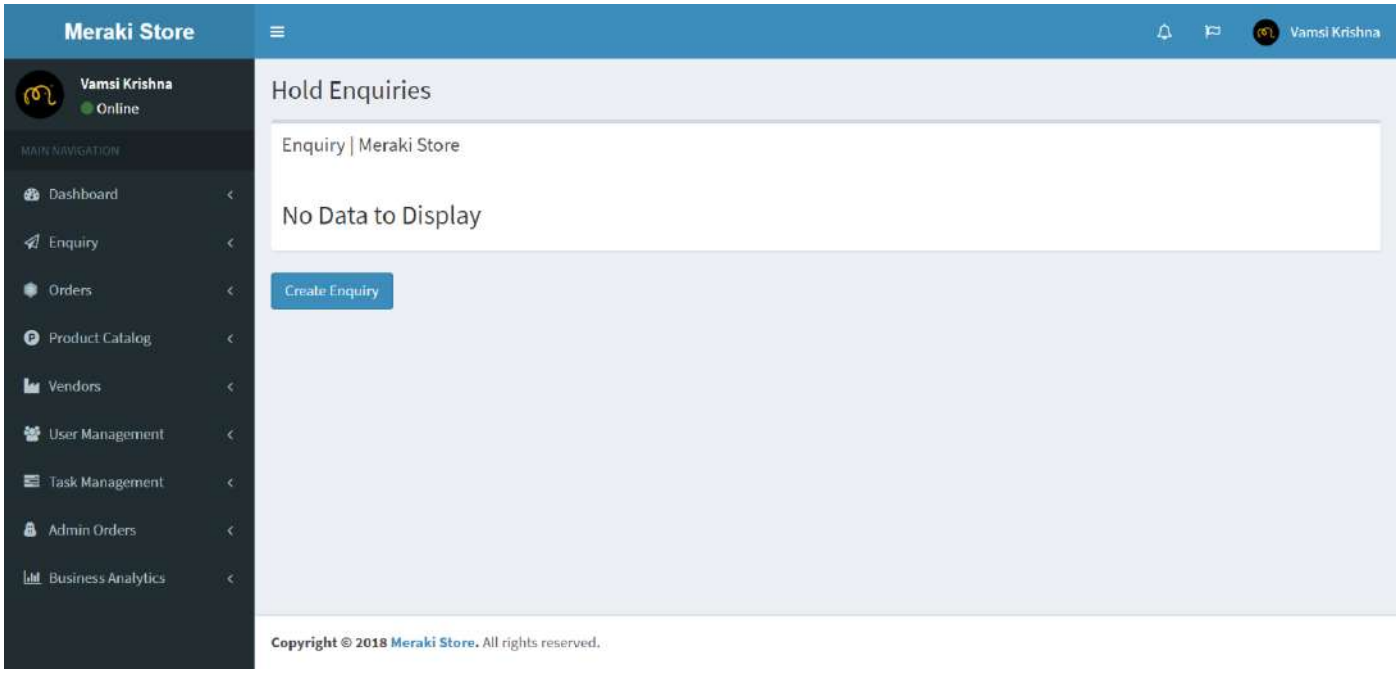
Approved Enquiries



Cancelled Enquiries



Hold Enquiries


Meraki Store
Vamsi Krishna
Online
MAIN NAVIGATION
Dashboard
Enquiry
Orders
Product Catalog
Vendors
User Management
Task Management
Admin Orders
Business Analytics
Vamsi Krishna
Hold Enquiries
Enquiry | Meraki Store
No Data to Display
Create Enquiry
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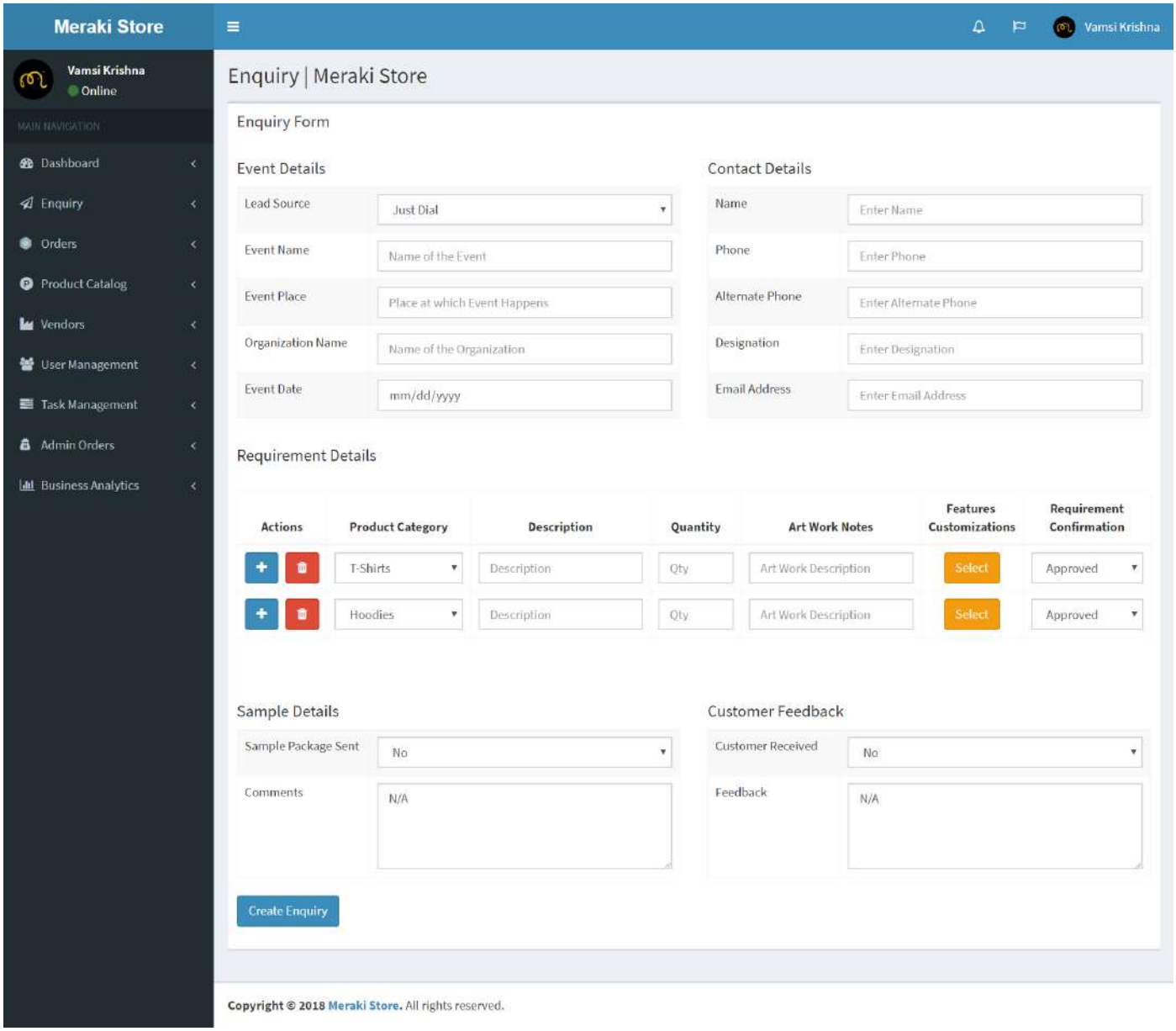
New Enquiry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MAIN NAVIGATION
Dashboard
Enquiry
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Business Analytics
Enquiry | Meraki Store
Enquiry Form
Event Details
Lead Source
Just Dial
Event Name
Name of the Event
Event Place
Place at which Event Happens
Organization Name
Name of the Organization
Event Date
mm/dd/yyyy
Contact Details
Name
Enter Name
Phone
Enter Phone
Alternate Phone
Enter Alternate Phone
Designation
Enter Designation
Email Address
Enter Email Address
Requirement Details
Actions
Product Category
Description
Quantity
Art Work Notes
Features Customizations
Requirement Confirmation
T-Shirts
Description
Qty
Art Work Description
Select
Approved
Hoodies
Description
Qty
Art Work Description
Select
Approved
Sample Details
Sample Package Sent
No
Comments
N/A
Customer Feedback
Customer Received
No
Feedback
N/A
Create Enquiry
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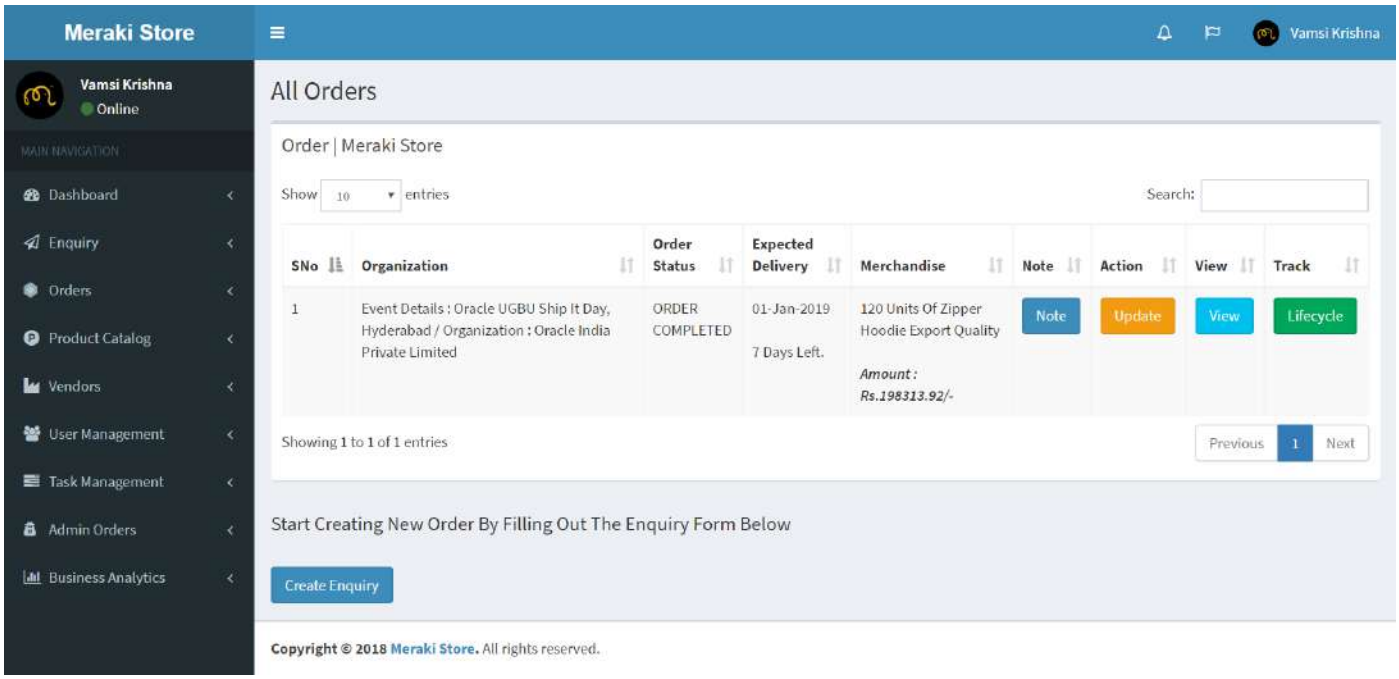
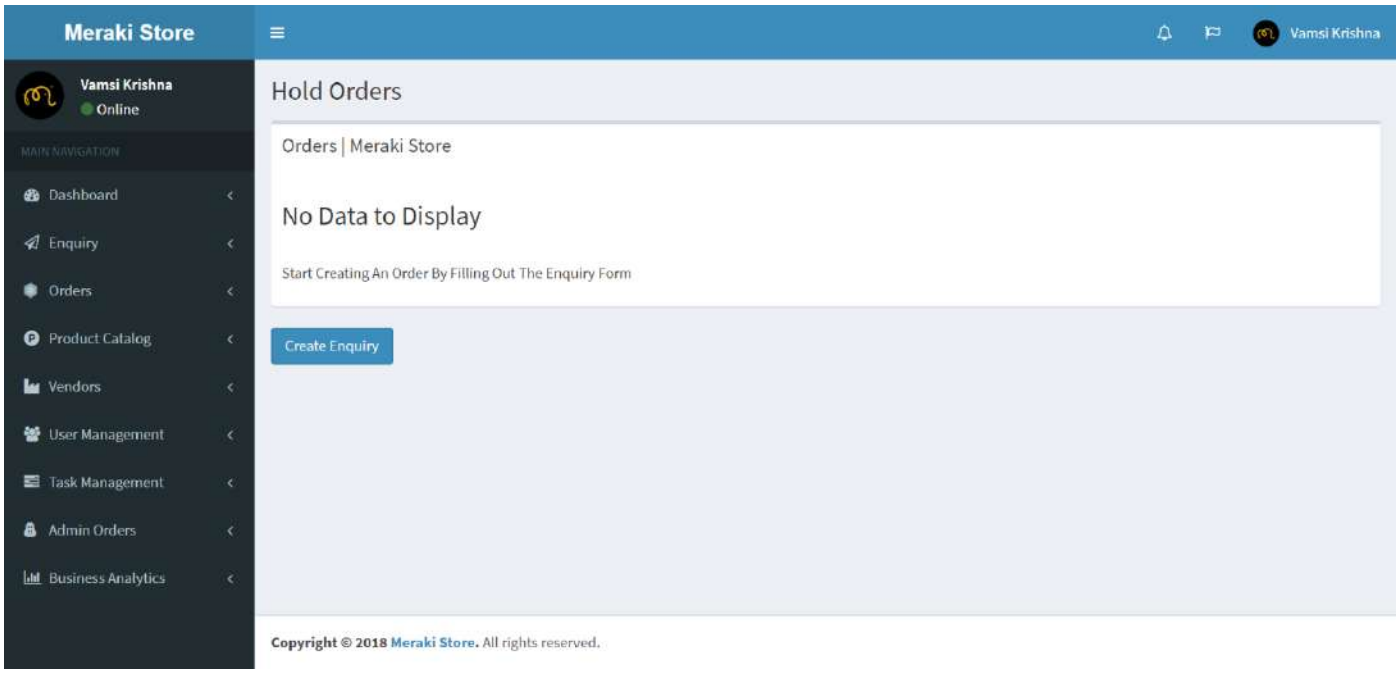
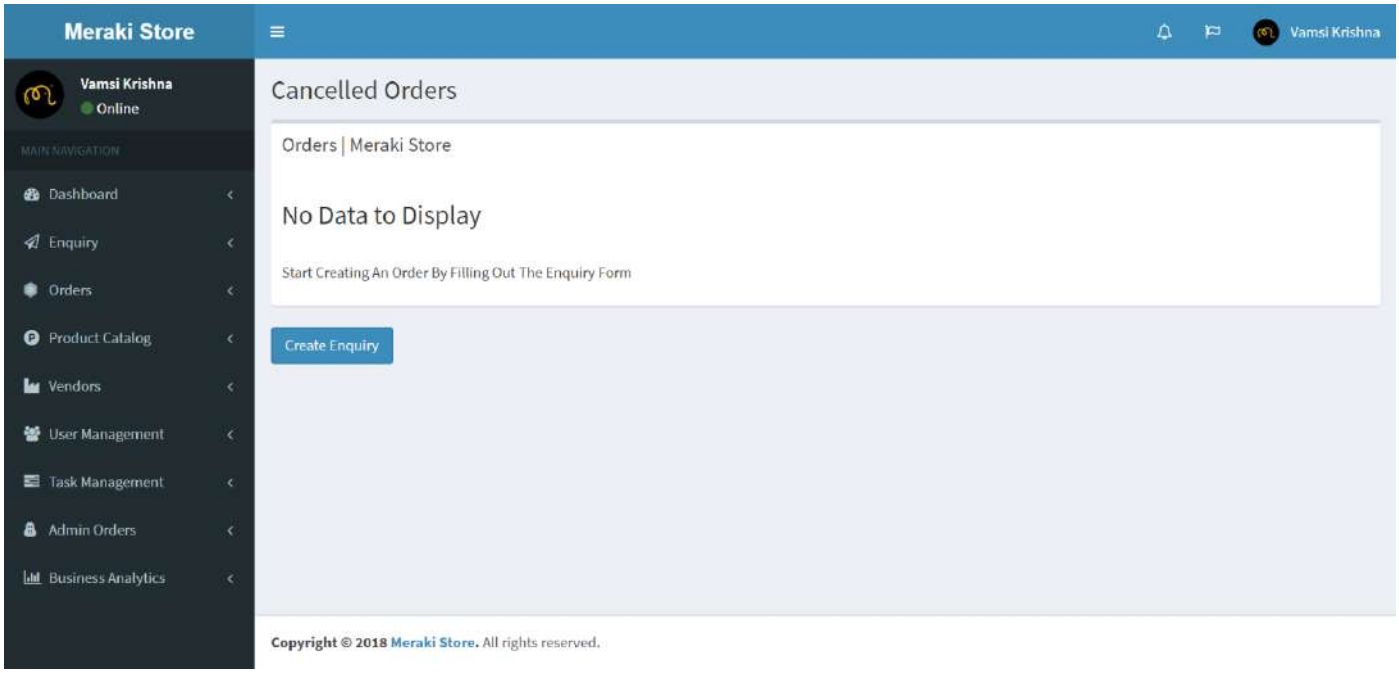
All Orders



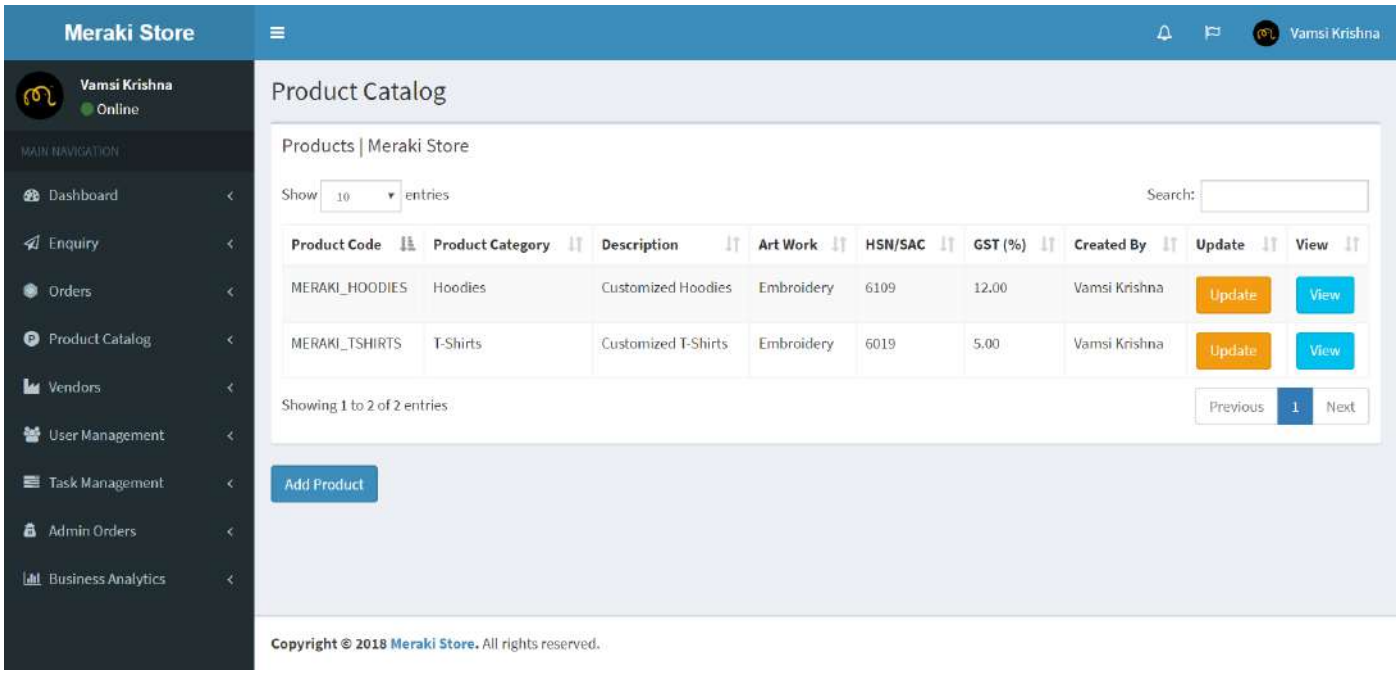
Hold Orders



Cancelled Orders



Product Catalog



New Product

Product Catalog | Meraki Store

Product Catalog Form

Product Details

Product Category	
Product Category Code	
Product Description	
Art Work	
HSN Code	
GST Tax (%)	

Product Features

Product Style

Feature Confirmation	Specification	Actions
Enable	N/A	Add Delete

Material

Feature Confirmation	Specification	Actions
Enable	N/A	Add Delete

Product Customizations

Colour

Feature Confirmation	Specification	Actions
Enable	N/A	Add Delete

Print Methods

Feature Confirmation	Specification	Actions
Enable	N/A	Add Delete

Conditions

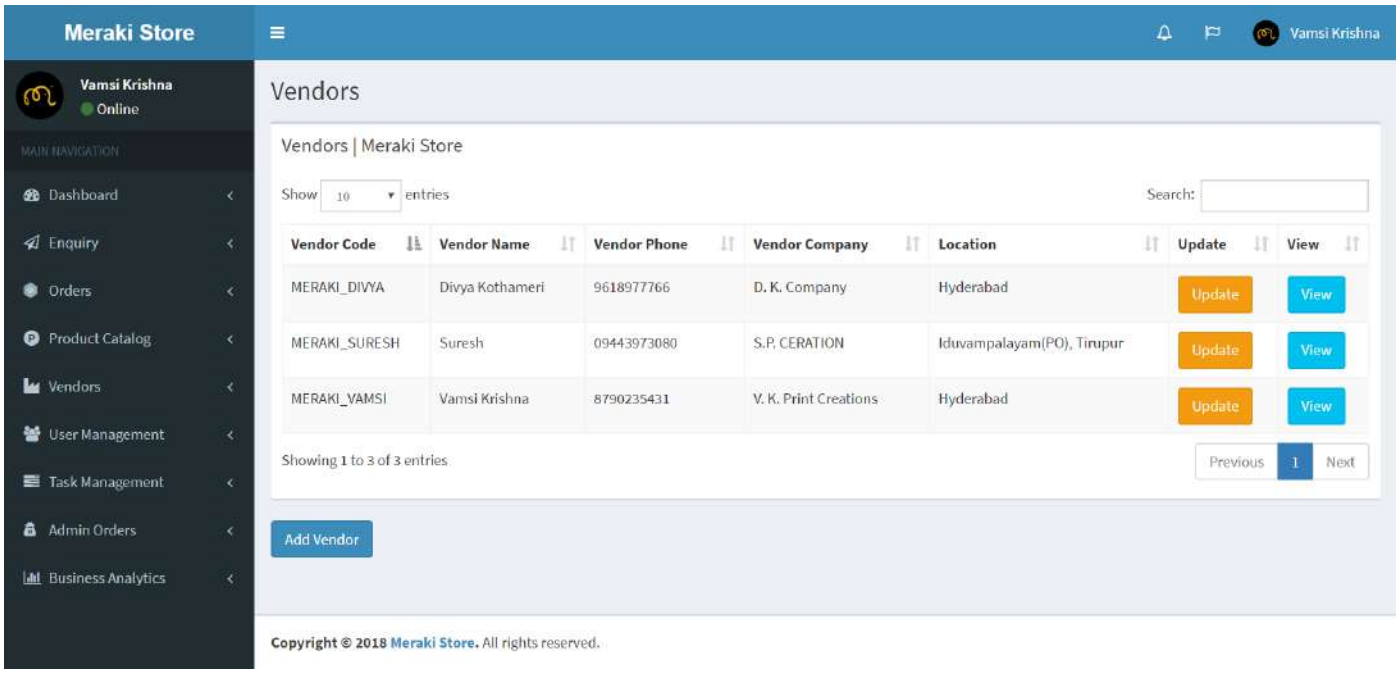
Finishing

Feature Confirmation	Specification	Actions
Enable	N/A	Add Delete

Packaging

Feature Confirmation	Specification	Actions
Enable	N/A	Add Delete

Vendors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Vendors
User Management
Task Management
Admin Orders
Business Analytics
Vamsi Krishna
Vendors
Vendors | Meraki Store
Show 10 entries
Search:
Vendor Code
Vendor Name
Vendor Phone
Vendor Company
Location
Update
View
MERAKI_DIVYA
Divya Kothameri
9618977766
D. K. Company
Hyderabad
Update
View
MERAKI_SURESH
Suresh
09443973080
S.P. CERATION
Iduvampalayam(PO), Tirupur
Update
View
MERAKI_VAMSI
Vamsi Krishna
8790235431
V. K. Print Creations
Hyderabad
Update
View
Showing 1 to 3 of 3 entries
Previous
1
Next
Add Vendor
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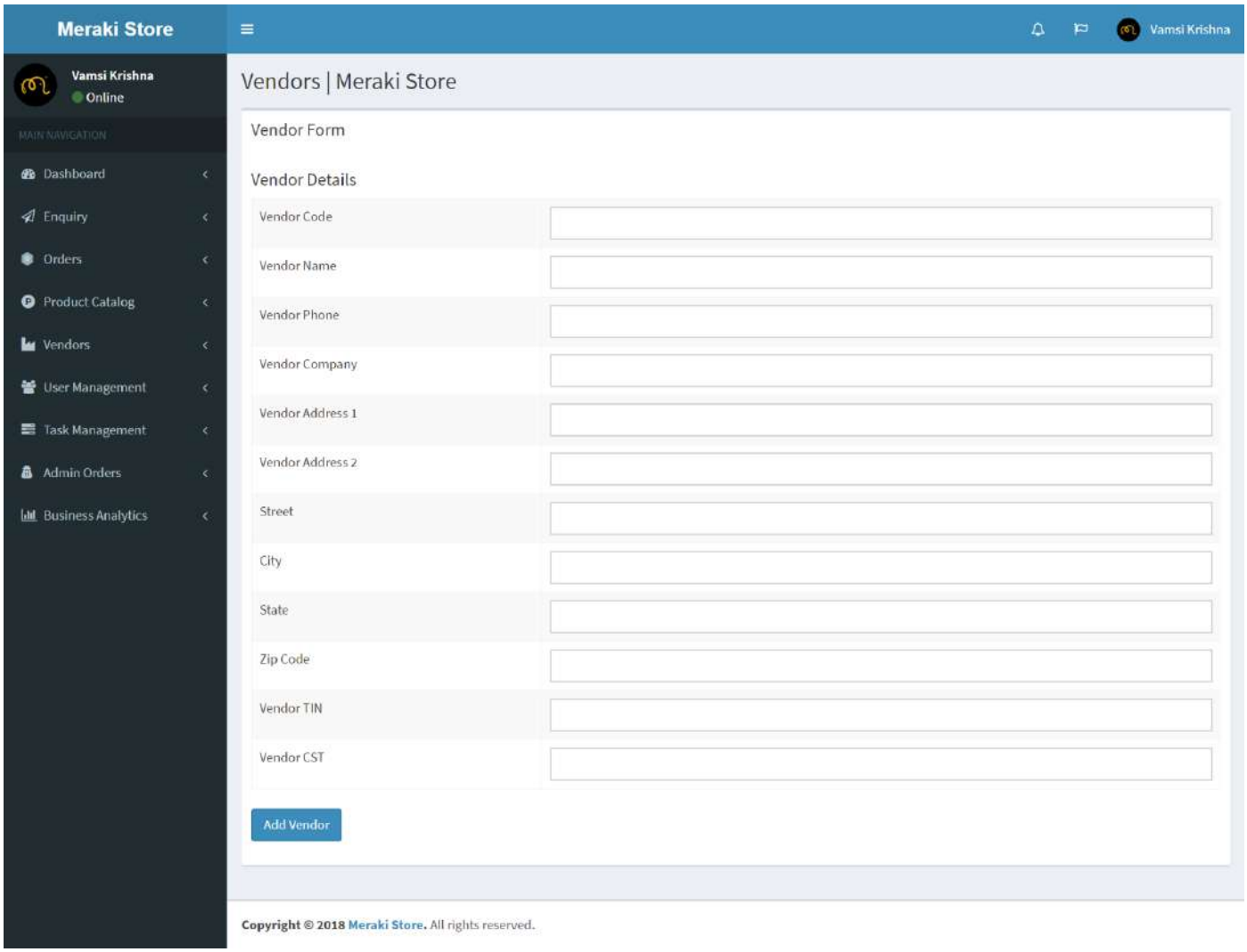
New Vendor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Vendors | Meraki Store
Vendor Form
Vendor Details
Vendor Code
Vendor Name
Vendor Phone
Vendor Company
Vendor Address 1
Vendor Address 2
Street
City
State
Zip Code
Vendor TIN
Vendor CST
Add Vendor
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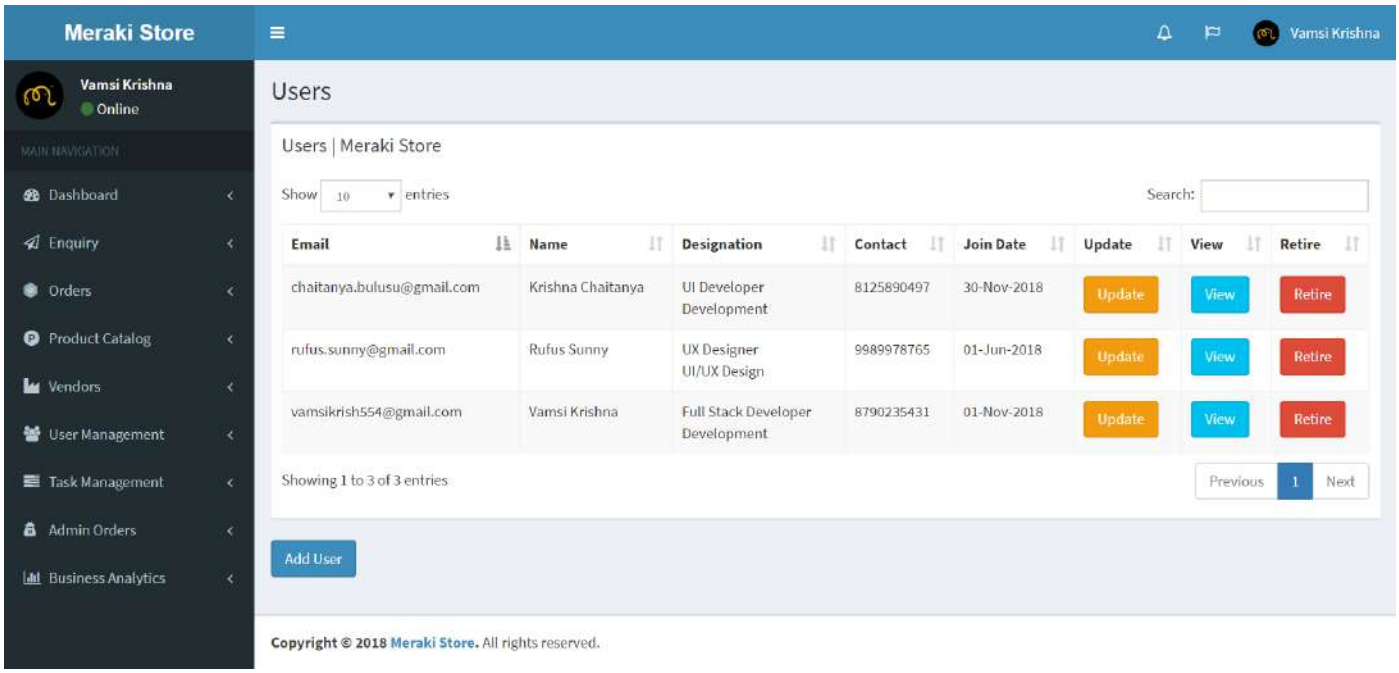
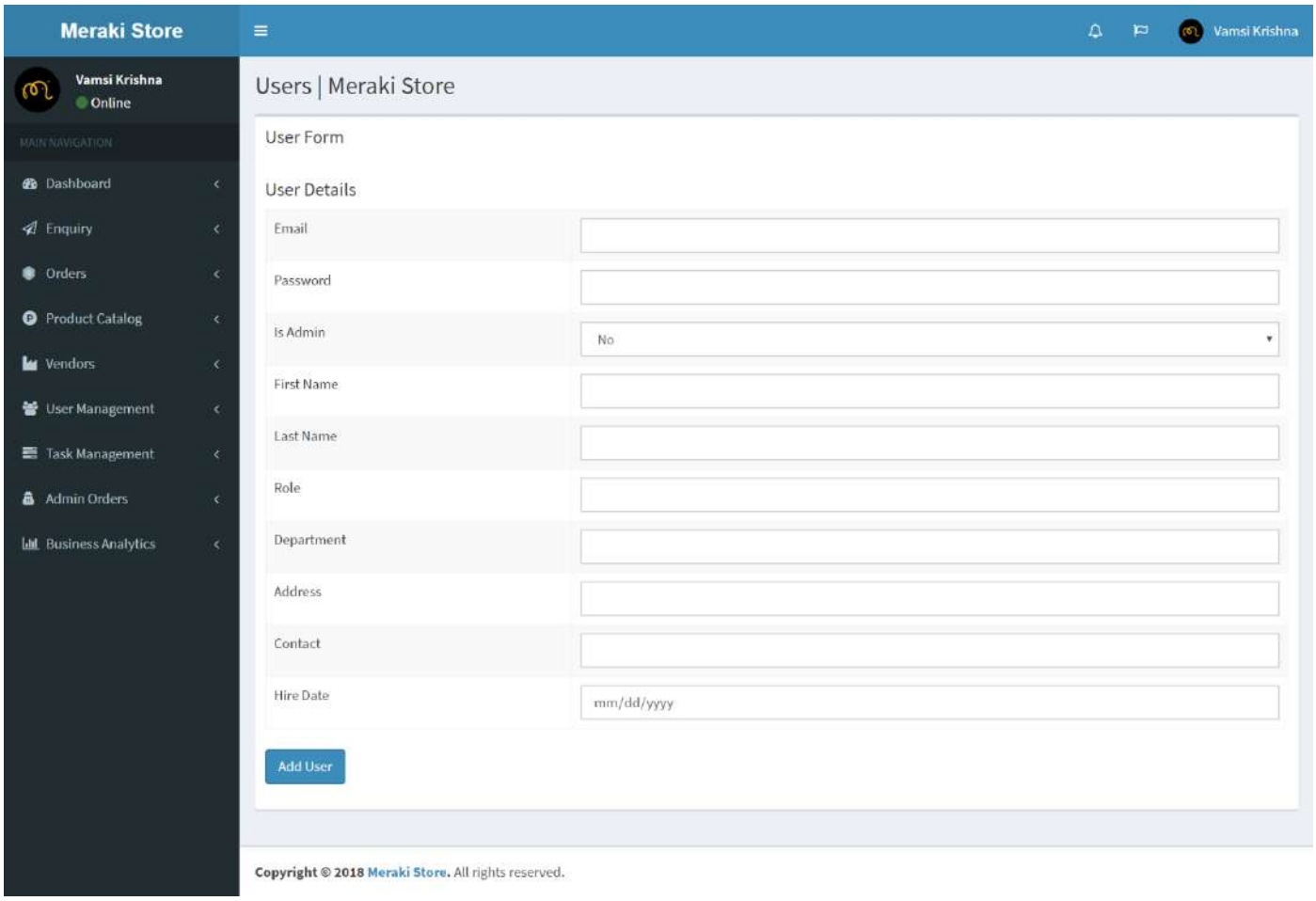
User Management



New User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Admin Orders
Business Analytics
Vamsi Krishna
Users | Meraki Store
User Form
User Details
Email
Password
Is Admin
No
First Name
Last Name
Role
Department
Address
Contact
Hire Date
mm/dd/yyyy
Add User
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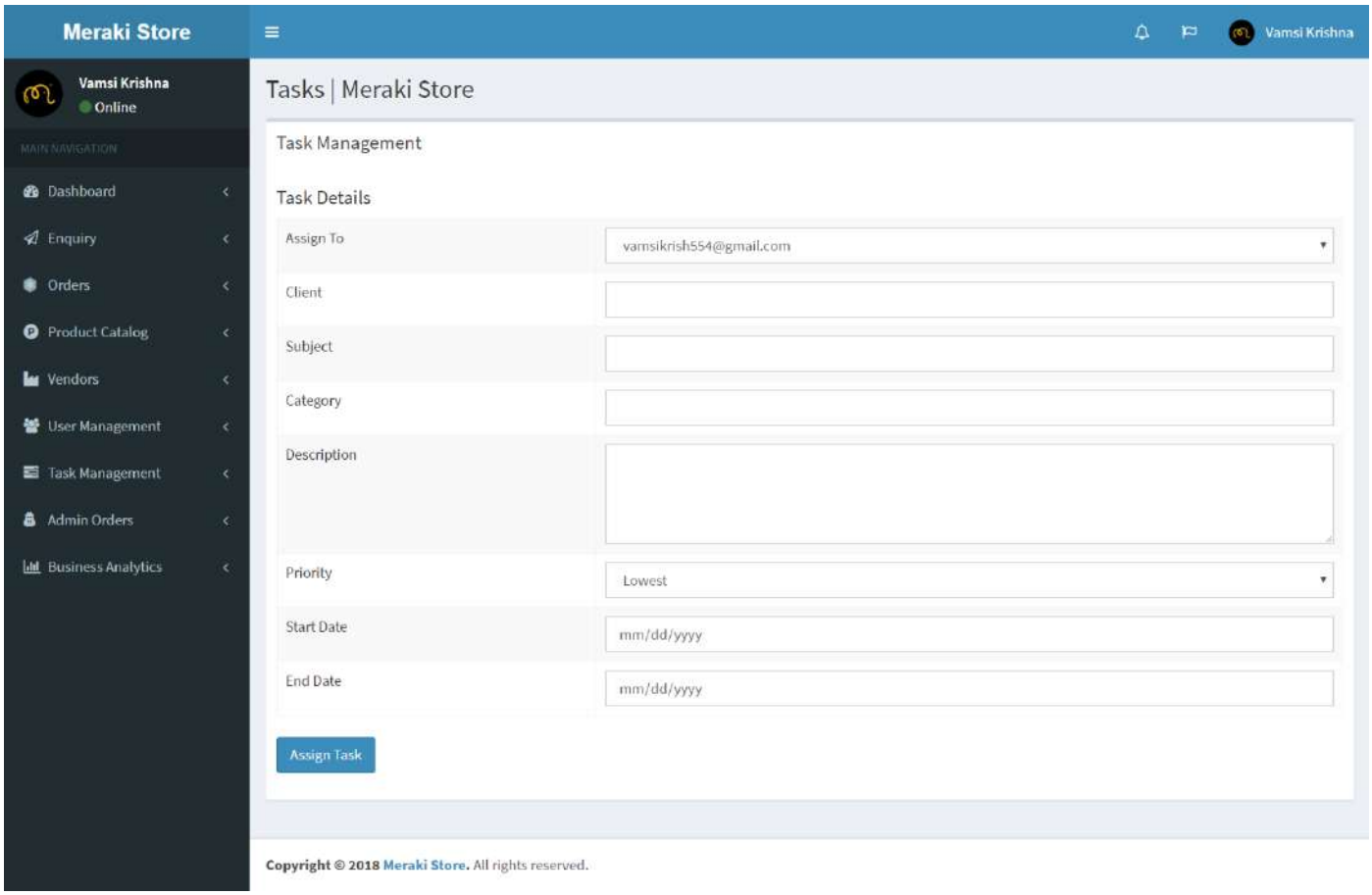
New Task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Dashboard
Enquiry
Orders
Product Catalog
Vendors
User Management
Task Management
Admin Orders
Business Analytics
Vamsi Krishna
Tasks | Meraki Store
Task Management
Task Details
Assign To
vamsikrish554@gmail.com
Client
Subject
Category
Description
Priority
Lowest
Start Date
mm/dd/yyyy
End Date
mm/dd/yyyy
Assign Task
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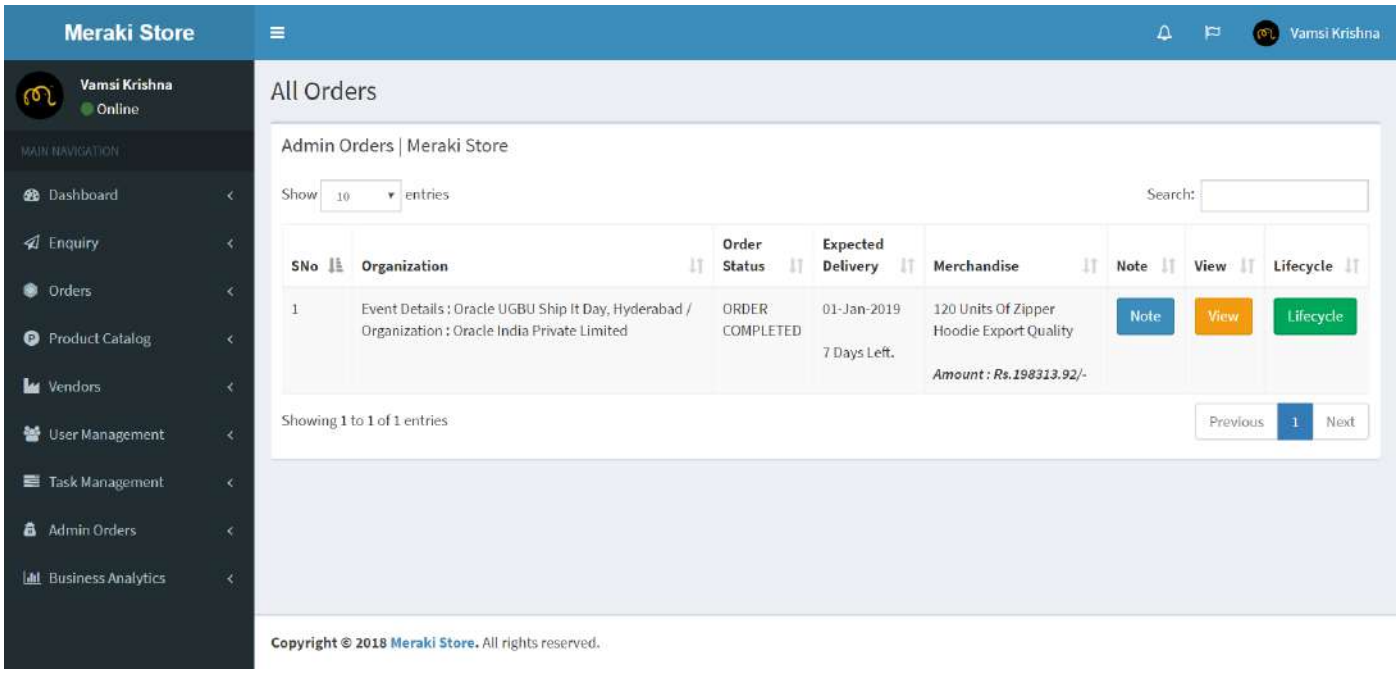
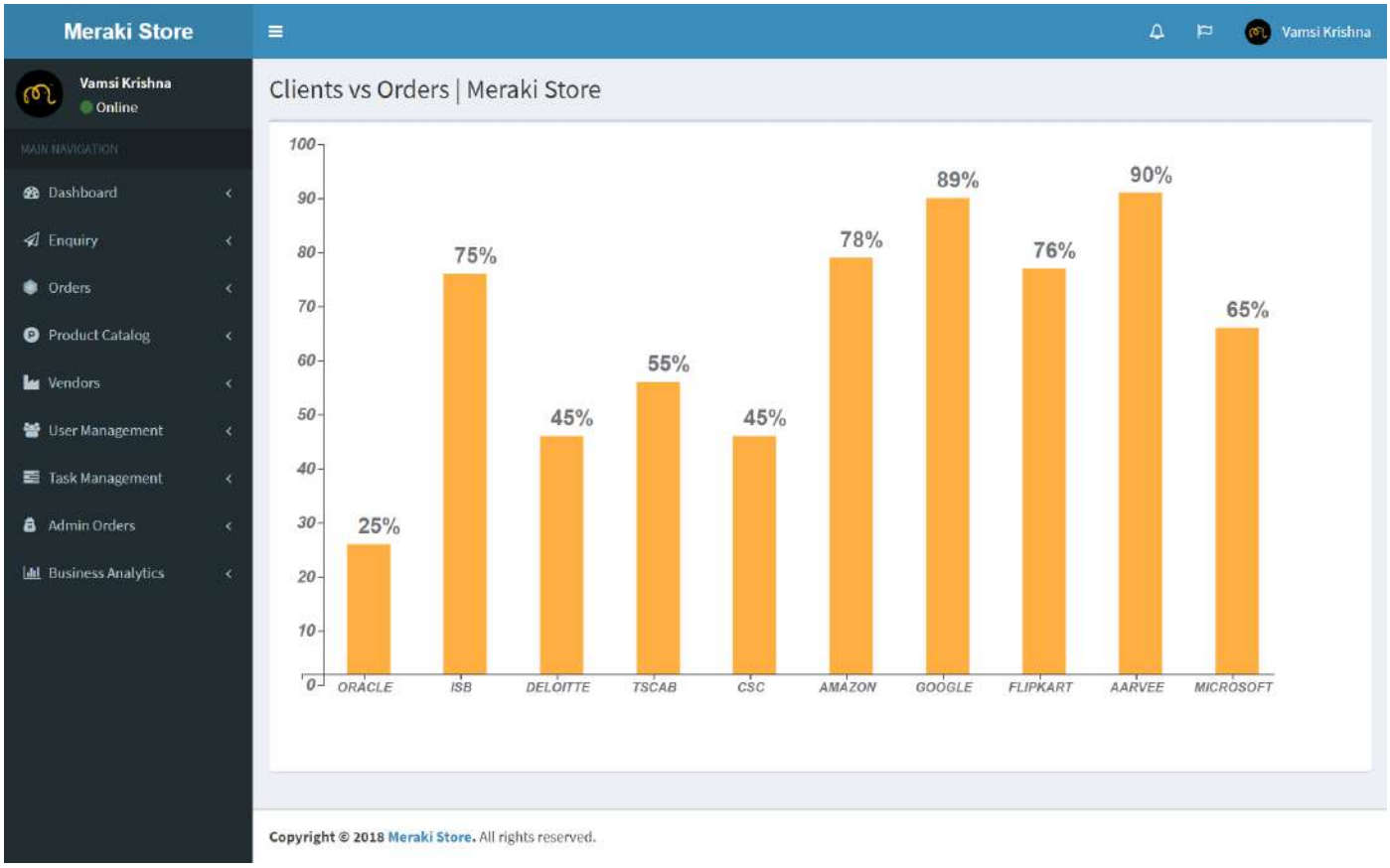
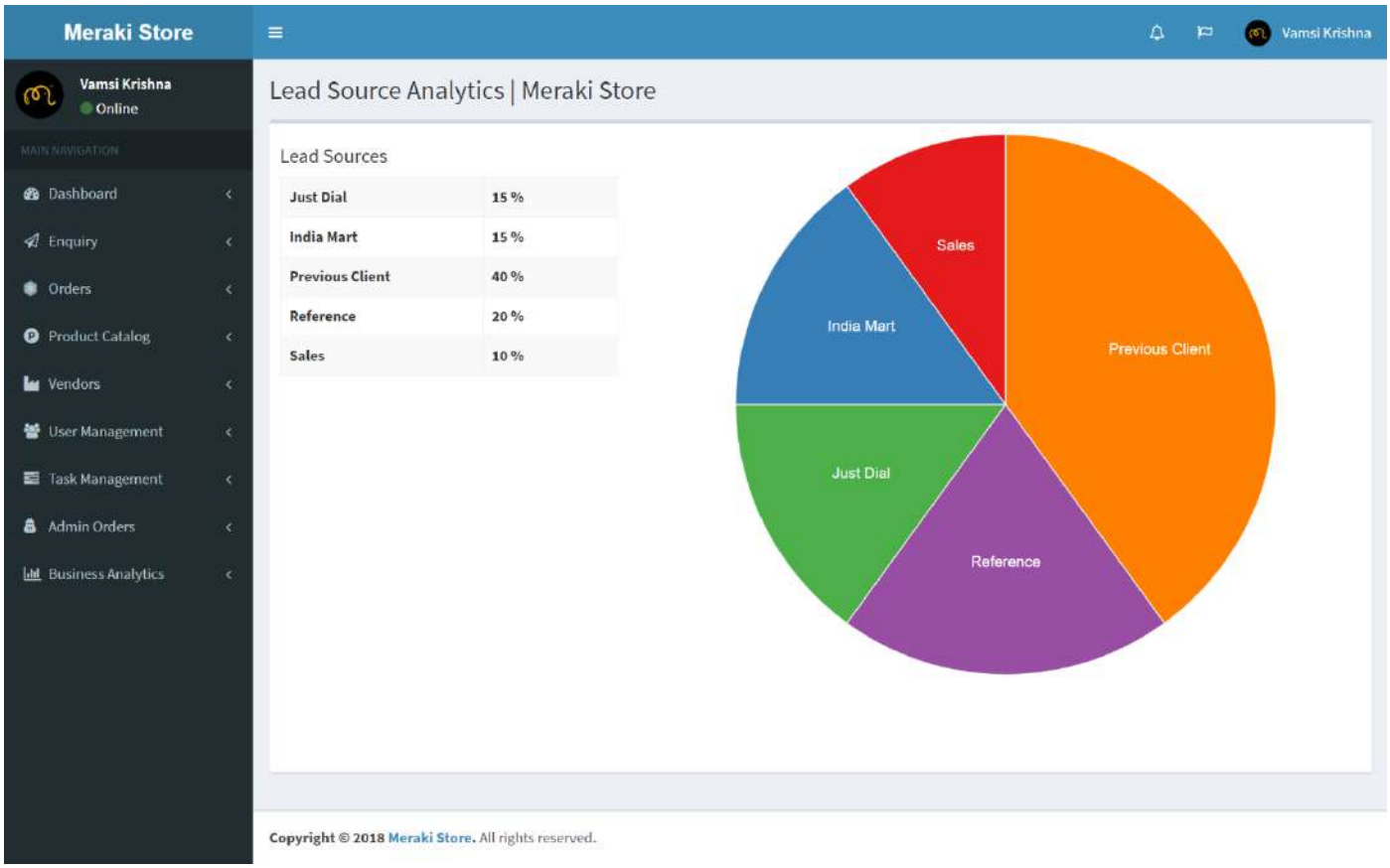
Admin Orders



Top Ten Orders vs Customers Analytics



Lead Source Analytics