

SOP – ERP Implementation, Training, Maintenance & Support

Organization: Balgopal Food Products Pvt. Ltd.

Sub-Function: ERP Implementation, Training, Maintenance & Support

Function: Information Technology (IT)

1. Purpose

To define standardized procedures for **implementing, training, maintaining, and supporting ERP systems** within Balgopal Food Products Pvt. Ltd.

This ensures a consistent, secure, and efficient ERP environment aligned with business processes and organizational goals under *Sankalp 2.0*.

2. Scope

Applies to:

- All ERP modules under **AIKYA ERP, Zoho Creator, Zoho Books, Tally Prime**, and integrated systems such as **HRMS, Biometric, Weighbridge, and Production Data**.
 - All departments using ERP (Production, HR, Finance, SCM, Marketing, Purchase, Admin, etc.).
 - ERP implementation, user onboarding, training, configuration, troubleshooting, vendor coordination, and data audit activities.
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3. Responsibilities

Role	Key Responsibilities
ERP Support Executive	ERP configuration, module testing, data validation, user support, ticket resolution.
IT Head	Approve configurations, manage implementation roadmap, review performance reports, vendor liaison.
ERP Vendor / Consultant	Implement modules, execute updates, handle escalations, and support integrations.
Department Process Owners	Define functional requirements, validate data, participate in testing, ensure adherence.
End Users	Report issues through Helpdesk, use ERP responsibly, attend trainings.

4. Procedure

A. ERP Implementation Phase

1. Planning & Requirement Gathering

- Collect process requirements from each department through structured forms and meetings.
- Document workflows, approval hierarchies, and reporting needs.
- Finalize module list, features, and integration scope.
- Prepare **ERP Implementation Plan** with milestones, responsibilities, and timelines.

2. System Design & Configuration

- Configure modules as per approved business process flow.
- Set up master data (customers, items, vendors, employees, machines, etc.).
- Create role-based user access and approval matrices.
- Validate integration with existing systems (Tally, HRMS, Weighbridge, Biometric).

3. Testing & Validation

- Conduct **UAT (User Acceptance Testing)** with department users.
- Record issues in **UAT Log** with module, issue type, resolution responsibility, and target date.
- Final approval for “Go-Live” from IT Head and department heads.

4. Go-Live & Rollout

- Migrate finalized master and transactional data post-validation.
 - Implement live environment module-wise or phase-wise.
 - Ensure backup and rollback readiness during transition.
 - Communicate “Go-Live Announcement” to all stakeholders.
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B. ERP Training & Onboarding

1. Training Planning

- Prepare annual and project-based training calendar.
- Classify training into:
 - *Basic User Training* – daily operations, form entries, reports.
 - *Advanced Training* – process audits, module-specific configurations.
 - *Admin Training* – access management, data control, report customization.

2. Training Execution

- Conduct departmental training (in-person/online) using SOP-based presentations and demo data.
- Record attendance and feedback.
- Maintain **ERP Training Register** with date, topic, trainer, and participants.

3. Post-Training Evaluation

- Conduct short assessments or practical checks to confirm understanding.
 - Identify retraining needs and schedule refresher sessions quarterly.
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C. ERP Maintenance & Support

1. Daily Monitoring

- Monitor ERP uptime, module response time, and server connectivity.
- Ensure daily backups are completed successfully.
- Maintain **ERP System Health Log**.

2. Ticket Management

- Record all ERP issues in **ERP Ticket Register** via Helpdesk system.
- Categorize:
 - *Critical (System Down)* – Resolve or escalate within 2 hrs.
 - *Major (Functional Error)* – Resolve within 1 working day.
 - *Minor (User Query)* – Resolve within 2 working days.
- Track ticket closure rate and SLA compliance weekly.

3. Change & Configuration Management

- All new configurations, reports, or module changes require **Change Request Form** approval.
- Maintain **ERP Change Log** with version control and validation notes.
- Test changes in sandbox environment before live deployment.

4. Data Integrity & Validation

- Weekly data audit for missing, duplicate, or incorrect entries.
- Monthly reconciliation between ERP, Tally, and operational data.
- Maintain **Data Validation Checklist** signed by department heads.

5. Patch Updates & Version Upgrades

- Monitor vendor patch releases and apply updates after testing.
- Conduct updates during off-peak hours (post-shift or holidays).
- Record changes and impact analysis in Change Log.

6. Vendor & AMC Management

- Maintain ERP AMC/Support Contract File with SLA and renewal dates.
 - Hold monthly review calls with vendor on open issues and new feature roadmaps.
 - Log vendor visits and remote sessions in **Vendor Support Tracker**.
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D. Reporting & Audit

- Monthly ERP performance report covering uptime, ticket summary, training conducted, and audit findings.
 - Quarterly ERP audit to review:
 - Data accuracy and access compliance.
 - Configuration change logs.
 - License utilization.
 - User satisfaction survey results.
 - Submit report to IT Head and Management for review.
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5. Records and Documents

Record Name	Description	Frequency	Maintained By
ERP Implementation Plan	Phase-wise project schedule	Once per project	IT Head
UAT Log	Module-wise testing and issues	During testing	ERP Support Exec
ERP Ticket Register	User issue log and resolution status	Ongoing	Helpdesk/IT
ERP Change Log	Record of changes and approvals	Ongoing	ERP Support Exec
ERP System Health Log	Uptime and backup record	Daily	ERP Support Exec
ERP Training Register	Record of sessions and attendance	Monthly	IT Dept
ERP Audit Report	Data and access audit report	Quarterly	IT Head
Vendor Support Tracker	Vendor interactions and AMC terms	Monthly	ERP Support Exec

6. Compliance & Review

- SOP to be reviewed **annually** or whenever major ERP changes occur (version upgrades, new module launch, or process redesign).
- Non-compliance (unlogged changes, unresolved tickets, data inaccuracies) must be reported to IT Head and Management within 24 hrs.
- Continuous improvement suggestions to be reviewed quarterly with the ERP vendor and key users.

- This SOP integrates all essential group activities** — implementation, user training, maintenance, and ongoing support — ensuring ERP operations are consistent, auditable, and business-aligned.
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Would you like me to now:

1. **Format this SOP** into your organization's standard Word template (`BGFP_IT_SOP_ERP_Implementation_v1.0_YYYYMMDD.docx`),
2. and include proper **headers, footers, and file naming details** per your IT File Naming Policy?