

ERPNext Success Pack scope

Scope Overview

The Success Pack is designed to provide essential configuration, training, and support for ERPNext implementation with predefined features, services, and limited customizations.

Customization / Consulting Hours

Usage:

- Hours specific to the plan are to be utilized within 2 months from the start of the contract.

Inclusions:

- Designing and implementing only **2 custom print formats** based on your requirements.
- Adding **custom fields** to existing DocTypes to suit your business needs.
- Creating **simple custom DocTypes**, if required.

Exclusions:

- This scope excludes heavy customizations such as extensive modifications to ERPNext's core functionalities or workflows.

Focus:

- Minor adjustments and enhancements to ensure compatibility with ERPNext's standard features while addressing specific requirements.

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Training

- Training will be delivered remotely via Google Meet.
- Training sessions and interactive guides will be recorded and shared.
- Training hours are **not** counted within consulting hours.

Defaults

- **Print Formats:** Up to 2 custom formats.
- **Custom Fields:** Up to 30 custom fields.
- **Custom Objects:** No custom DocTypes unless covered under simple customization.
- **Workflows:** Standard Maker-Checker workflow.
- **Chart of Accounts:** Standard COA will be implemented.
- **Email Integration:** Default email sending only.
- **Email Templates:** For standard use cases.
- **Notifications:** Configured for predefined use cases (annexure TBD).

Data Imports

- Up to **3,000 customers/suppliers** (in specified format).
- Up to **500 items** in the Item Master.
- **Opening/Closing Balances:** Standard imports only, no backdated data.

Support Process and Ticketing

- All tickets are to be raised via the Partner's Support Portal.
- Tickets will be categorized as OEM or Implementation issues, with priority and classification shared.

Support Hours

- Monday to Friday (working hours only)
- Email support through the respective Partner.
- Weekend support for critical issues only.
- After-hours calls are routed to the designated consultant (for clients with Priority & Phone Support).

Module Scope

Inclusions

- Custom fields for existing DocTypes.
- Simple custom DocTypes (if required).
- Basic setup for **Sales, Purchases, Inventory, and Accounting**.
- Initial data import for up to **3 modules** (e.g., Customers, Items, Suppliers).

Exclusions

- Core modifications, third-party integrations, advanced automation/scripts.

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Sales

Inclusions:

- Set up for Quotations, Sales Orders, and Invoices.
- Custom print formats (up to 2).
- Customer master and pricing rule setup.
- Email templates & auto-acknowledgment.

Exclusions:

- Sales forecasting or advanced pipeline reporting.
- Third-party integrations (e.g., Shopify).

Purchase

Inclusions:

- Supplier Quotations, Purchase Orders, Receipts.
- Supplier master setup with tax.
- Standard approval workflows.

Exclusions:

- Automated procurement planning.
- Vendor portal integrations.

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Inventory

Inclusions:

- Item, Warehouse, Stock Ledger.
- Valuation methods: FIFO, Moving Average.
- Stock Entries: Transfer, Issue, Receipt.
- Barcode field and stock aging.

Exclusions:

- RFID or warehouse automation.
- Serial/batch customization beyond standard.

CRM

Inclusions:

- Lead & Opportunity tracking.
- Territory and sales stage setup.
- Assignment rules, auto-email alerts.

Exclusions:

- Lead scoring, CRM integrations.
- Deal pipeline analytics.

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Accounting

Inclusions:

- Standard Chart of Accounts.
- Sales/Purchase Invoice setup.
- Journal & Payment Entry, Bank Reconciliation.
- Profit & Loss, Balance Sheet reports.

Exclusions:

- Multi-currency consolidation.
- Custom financial reports or integrations.

Manufacturing

Inclusions:

- BOM, Work Orders, Production Planning tools.
- Custom fields in Manufacturing DocTypes.
- Custom print formats (e.g., BOM sheet).
- Production tracking reports.

Exclusions:

- Custom algorithms or workflows.
- Machinery/PLC integration.

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HRMS

Inclusions:

- Employee records, leave, and attendance tracking.
- Custom leave policies, approvals.
- HR-specific print formats.
- Additional HRMS fields (e.g., Skills, Certifications).

Exclusions:

- Advanced performance workflows/KPIs.
- Third-party HRMS integrations.

Payroll

Inclusions:

- Payroll setup: Salary Structure, Payslip.
- Custom Payroll fields (Deductions, Benefits).
- Payslip print formats.
- Standard tax configuration.

Exclusions:

- Multi-country tax rules.
- Custom payroll scripts or external integrations.