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Industrial Services Provider ERP

Product Specification & Business Playbook

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Industrial Services Provider ERP — Product Specification & Business Playbook

Sector focus: Mechanical, Electrical & Civil service providers (industrial sites, factories, utilities).

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1. Executive Summary

This document outlines the capabilities of an end-to-end Enterprise Resource Planning system designed for industrial service providers. The system focuses on two outcomes: comprehensive traceability (who/what/when/where/cost) and actionable insights (reports and notifications) that reduce waste, improve margins, and accelerate growth.

The platform can be deployed in phased modules and configured per client. It supports English and Arabic, multiple branches, and standard industry practices for proposals→projects→closeout, inventory/assets with depreciation, HR & payroll, financials, and compliance documents.

2. Design Principles

- Business-first: everything is phrased in operational terms; modules mirror real teams and workflows.
- Right information, right time: dashboards and notifications surface exceptions rather than raw data dumps.
- One source of truth: modules and tabs are centrally defined; the interface adapts to your permissions.
- Progressive rollout: start with core operations, then add analytics and automation for greater ROI.
- UAE-ready: branches model, national holidays, and document expiries align with local operations.

3. System-wide Behaviors

- Role-based views: users see only the modules/tabs they have access to; parent permissions grant child capabilities.
- Soft vs hard delete with child-count preview; every module includes a Deactivated list view.
- Bulk import via guided templates for master data and transactional logs (with safe upsert).
- Document expiries: any entity can attach expirable documents, with reminder rules and escalation.
- Traceability: every issue/return/transfer/time log is tied to a person, a project, and a timestamp.
- Issue reporting: if a system error occurs, an issue ticket is captured with context for rapid resolution.

4. Operating Lifecycle (End-to-End)

Lead → Proposal

Sales assembles a proposal from the service catalog and templates; revises until client acceptance. Price lists and client-specific rules ensure consistency.

Proposal → Project

On acceptance, a project is created with baseline estimations (manpower/tools/equipment/materials/time).

Planning → Assignment

Project manager refines tasks and assigns resources considering availability and cost rates.

Execution → Consumption

Teams record labor time, issued items, tool usage (including days-of-usage). Actuals roll up to variance reports.

Variations & Risks

Changes are captured as variation orders; schedule risks flagged via alerts and calendars (incl. national holidays).

Closeout & Handover

Documentation, punch list closure, and client sign-off; lessons learned feed templates and service averages.

Billing & Collections

Milestone billing, AR monitoring, and dunning. Expenses and payroll journals integrate to financials.

5. Modules & Tabs (What You Get)

Users & Access

Tab Code	Tab Purpose
users	Users (manage accounts, branches, activation; quick actions: mask-as, reset password).
roles	Roles & Permissions with hierarchical tree (module → tab → section/action). Selecting a pare
profile	User Profile & Access (self-service). Edit personal info, picture, language, branch defaults.
audit	Audit Logs for user actions with filters (date, actor, module, action).
sessions	Active Sessions with last-seen and force-logout; inactive expiry policy.

Human Resources

Tab Code	Tab Purpose
employees	Employees master data, job/grade, branch, cost rates, documents.
attendance	Attendance/Timesheets; approvals; overtime thresholds.
leave	Leave, vacations & holidays; balances; carry-over rules.
payroll	Payroll generation from attendance; allowances/deductions; export to finance.
recruitment	Candidates, stages, interviews, outcomes; pipeline analytics.
documents	Employee documents; expiries; reminders.

Clients Management

Tab Code	Tab Purpose
clients	All clients with KPIs, quick links to proposals/projects.
branches	Client branches tied to geography.
sites	Sites under branches; map coordinates.
contacts	People and roles at client organization.
activity	Interaction history: meetings, calls, emails, files.

Proposals & Quotations

Tab Code	Tab Purpose
proposals	Proposals & revisions; lifecycle: draft → sent → accepted/rejected/revised; active revision hig
services	Services catalog (BOM & average consumption: manpower/tools/equipment/time).
templates	Proposal templates with variables/sections.
pricelists	Price lists & rules; date- and client-specific overrides.
pdf	PDF layouts library; client branding per proposal.

Projects & Delivery

Tab Code	Tab Purpose
projects	Projects board/list with health, budget, and schedule status.

planning	Estimations & planning derived from accepted proposal; baseline locked.
resources	Assignments: manpower, tools, equipment; calendars & availability.
consumption	Actuals for time, materials, tools; variance vs plan.
variations	Variation orders / change requests; approvals; budget impact.
closeout	Handover & closeout: punch list, docs, client sign-off.

Inventory, Assets & Stocktaking

Tab Code	Tab Purpose
stores	Stores/containers per branch; items belong to a store; inter-store transfers without altering life
items	Items & categories; barcode/QR support; condition state (excellent → bad → dead).
issue_return	Issue to projects and returns; auto track who/what/when/for which project.
transfers	Store-to-store transfers; approvals where required.
stocktaking	Stocktaking cycles; discrepancies and adjustments.
maintenance	Maintenance & calibration schedules; service history.
depreciation	Depreciation & cost/use: per-use and *Days of Usage* units; auto-charge to projects when as

Financials

Tab Code	Tab Purpose
invoices	Invoices & billing; link to projects/proposals.
expenses	Operational expenses by project/department; approvals.
payments	Receipts & payouts; reconciliation status.
ar	Accounts receivable aging, dunning letters.
ap	Accounts payable, vendor terms, due date alerts.
cost_centers	Cost centers & allocation rules.
salary_journal	Payroll journal from HR; review & post.

Reports & Analytics

Tab Code	Tab Purpose
dashboards	Executive dashboards: margin, utilization, WIP, cash.
ops_reports	Operations & projects reports (variance, productivity).
finance_reports	Financial statements and drilldowns.
hr_reports	HR & payroll analytics: overtime, absence, headcount.
inventory_reports	Inventory KPIs: turns, shrinkage, maintenance cost.
builder	Custom report builder for ad-hoc analysis.

Notifications

Tab Code	Tab Purpose
rules	Notification rules (event-driven/scheduled).
templates	Message templates with variables; localization.

channels	Email/SMS/Push channels; throttling & dedupe.
outbox	Outbox & queue monitoring; retry logic.
log	Delivery log with status and bounce reasons.

Documents

Tab Code	Tab Purpose
types	Document types with metadata & expiry flag.
documents	Central repository; link documents to any entity.
expiry	Expiry monitor: upcoming, overdue; escalation.

Superuser (Internal Admin)

Tab Code	Tab Purpose
tickets	System error tickets (from 500 capture); status & PR link.
modules	Master modules & tabs (lock/unlock/rename/reorder).
branches	Manage branches (incl. hidden ALL).
holidays	National holidays set; UAE seeded; edit flags.
settings	Global settings and brand assets.

6. Inventory, Assets & Depreciation — Business Rules

- Each physical store (container/warehouse/van) is tied to a branch. Items are stored in exactly one store at a time.
- Inter-store transfers preserve the item's lifetime metrics (usage counters, service history).
- Issue/Return records track who took what, for which project/task, when it left, and when it returned.
- Condition states (excellent/good/average/bad/dead) drive maintenance work orders and replacement planning.
- Depreciation modes: per-use (e.g., 50 AED ÷ 1000 uses) and *Days of Usage*. Both methods can be combined per item category.
- When an item is assigned to a project, cost accrues automatically based on the configured depreciation mode.
- Periodic stocktaking reconciles expected vs actual; discrepancies route to approvals and adjustments.

7. HR & Payroll — Business Rules

- Employees have branches, grades, cost rates, and document sets (with expiries).
- Attendance supports approvals and overtime thresholds; exceptions feed notifications.
- Leave balances, carry-over, and entitlement policies are configurable by grade and branch.
- Payroll is derived from approved timesheets and leave; journals are posted to Financials.
- Recruitment manages candidates, interview panels, outcomes, and conversion to employee records.

8. Projects — Control & Visibility

- Accepted proposals create projects with a locked baseline. Changes after baseline are tracked as variations.
- Assignments consider availability calendars (including national holidays) and cost rates.
- Actuals (labor, items, tools) are logged against tasks. Variance reports highlight cost/schedule drift.
- Closeout requires documents, punch items closure, asset returns, and client sign-off.

9. Notifications & Documents — Compliance without Friction

- Any record can carry documents. Mark a document type as expirable to enable reminders and escalations.
- Notification rules can be event-driven (e.g., item issued without calibration) or scheduled (weekly AR reminders).
- Channels include Email/SMS/Push with throttling and deduplication to avoid noise.

10. Extended Insights (The 20% that Multiplies ROI)

Beyond the core operational modules, the analytics and automation layer magnifies value. These capabilities can be enabled as a premium tier or phased later.

- Advanced analytics with anomaly detection (e.g., unusual material usage, timesheet outliers).
- Executive dashboards with predictive insights (profitability, capacity, cash).
- Smart notification orchestration (auto-grouping, throttling, time-window delivery).

11. Suggested Rollout Plan

- Phase 1 – Foundation: Users & Access, HR basics, Clients, Documents (expiries), Notifications skeleton.
- Phase 2 – Quote-to-Cash Core: Services catalog, Proposals (revisions/PDF), convert to Projects; Planning, Resources, Consumption.
- Phase 3 – Inventory & Assets: Stores, Items, Issue/Return, Transfers, Stocktaking, Maintenance, Depreciation.
- Phase 4 – Financials: Expenses, Invoices, Payments, AR/AP, Cost Centers, Payroll journal.
- Phase 5 – Reports & Analytics: Operations, Inventory, Financial, HR, plus custom builder.
- Phase 6 – Polish: audit log UI, importers, advanced notifications, performance, QA hardening.

12. KPIs & Success Metrics

- Proposal win rate; average time from lead to acceptance.
- Project gross margin; variance vs baseline; rework ratio.
- Tool utilization %, maintenance cost per asset, MTBF/MTTR.
- Inventory turns; stockout incidents; shrinkage %.
- Labor utilization %, overtime %, absence rate.
- DSO (days sales outstanding); AR aging buckets.
- On-time closeout rate; client satisfaction survey score.

13. How This ERP Saves and Makes Money

The following levers directly reduce cost or increase revenue. Most clients feel measurable impact in the first quarter after go-live; the remainder comes as the analytics layer is adopted.

- Reduce tool and asset loss through check-in/out, traceability, and stocktaking variance alerts.
- Lower maintenance costs via scheduled calibration and predictive maintenance patterns.
- Accurate project costing using per-use and days-of-usage depreciation charged to jobs.
- Prevent deadline penalties with proactive alerts (expiring permits, holidays, critical path).
- Increase win rate with proposal templates, service catalog, and revision tracking.
- Improve margins by comparing plan vs actuals in near real time; catch overruns early.
- Shorten cash cycle by linking project milestones to billing and reminding overdue AR.
- Cut purchasing waste through consumption analytics and stock level visibility.
- Boost labor productivity via attendance analytics, overtime policy enforcement, and utilization KPIs.
- Reduce compliance risk with document expiry monitoring and audit trails.
- Scale operations by standardizing services (BOM averages) and reusing best-practice templates.
- Enhance customer trust with transparent histories of work, materials, and maintenance.
- Decrease rework through better handover/closeout documentation and variation control.
- Streamline approvals and governance with role-based views and hierarchical permissions.
- Save administrative time with bulk imports, reusable templates, and automated reminders.

14. Next Steps

Select the initial modules to deploy based on your operational pain points, and set the targets for the KPIs above. From there, the platform grows with your business—standardizing services, preventing waste, and delivering the visibility needed to take on more projects with confidence.