

Chapter 2: ERP Quick Start Guide

2.1 ERP at a Glance

An Enterprise Resource Planning (ERP) system integrates multiple business departments into a single platform. All departments share the same database, allowing information to flow automatically throughout the organization.

The key principle of an ERP system is:

Enter data once, use it everywhere.

This eliminates duplicate work, improves data accuracy, and increases operational efficiency.

2.2 How ERP Works

Each department performs different tasks, but every transaction is connected.

A typical business process follows this sequence:

Customer Inquiry → Quotation → Sales Order → Delivery Order → Outgoing Shipment → Sales Invoice → Payment → Financial Reports

Information entered in one module is automatically available to the next module without requiring manual re-entry.

2.3 Business Workflow

The following example illustrates a standard sales process:

1. Create a quotation for the customer.
 2. Convert the quotation into a Sales Order after customer confirmation.
 3. Prepare and ship the products through the warehouse.
 4. Update inventory automatically after shipment.
 5. Generate a Sales Invoice.
 6. Record customer payment.
 7. Update accounting records and management reports automatically.
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2.4 Core Modules

The ERP system consists of several integrated modules:

Module	Purpose
Sales	Manage quotations, orders, and invoices
Purchasing	Manage supplier purchases
Inventory	Track stock movements and inventory levels
Warehouse	Process picking, packing, and shipping
Accounting	Manage financial transactions and reports
CRM	Manage customer information
Dashboard	Display real-time business analytics

2.5 Common Documents

During daily operations, users will frequently encounter the following documents:

Document	Description
Quotation	Price proposal sent to a customer
Sales Order (SO)	Customer confirms the purchase
Delivery Order (DO)	Authorization to prepare and deliver goods
Sales Invoice	Official invoice requesting payment
Payment	Customer payment record

Each document is linked to the next stage of the workflow.

2.6 Before You Start

Before using the ERP system, remember these important guidelines:

- Complete business processes in the correct sequence.
- Verify customer, product, and pricing information before creating transactions.
- Avoid creating duplicate records.
- Do not delete completed transactions unless authorized.
- Ensure all required information is entered accurately before saving.

Following these guidelines helps maintain data consistency and ensures smooth operation across all integrated modules.

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