

Software Requirements & Feature Specification

Project: Custom ERP Development - Phase 1 (Service Automation)

Client: KAILASH ELECTRONICS & MOBILES

Date: June 30, 2026

1. Project Overview & Objective

KAILASH ELECTRONICS & MOBILES is a trusted, multi-brand sales and service center handling a diverse range of products from mobile phones and LED TVs to complex Solar CCTV and Car Audio installations.

To support continued growth and ensure complete customer satisfaction, this project aims to develop a Custom Enterprise Resource Planning (ERP) system. The project will be executed in multiple phases.

Phase 1 Objective: To completely digitalize, streamline, and automate the **Service and Repair Workflows**, encompassing both in-shop (carry-in) repairs and on-site field services.

Solving Core Challenges: A primary goal of Phase 1 is to provide management with **real-time, remote visibility** into all shop operations. This will completely eliminate the dependency on manual ledger checks and staff phone calls when responding to customer status inquiries, even for jobs submitted months ago. Additionally, the system will introduce structured workflows to reduce the frequency of abandoned devices and streamline payment collection.

2. Proposed System Modules (Phase 1)

Based on our analysis of your service delivery models and operational requirements, the Phase 1 system will be built around the following core modules:

Module 1: Centralized Service Desk & Remote Intake

The core engine for managing all incoming service requests, designed to provide instant answers to customers, whether the MD is in the shop or on the road.

What this solves: Eliminates the chaotic "phone tag" between the MD and shop staff, instantly ends reliance on manual paper ledgers, and provides clear financial protection against abandoned inventory.

- **Cloud-Based Remote Access (MD Dashboard):** Management can access the system securely from a mobile browser anywhere, instantly viewing the real-time status of any job without needing to call the shop floor.

- **Smart Search & History Archive:** Instantly look up any current or past job card (even from months ago) using a customer's phone number, name, or asset serial number. Eliminates tedious ledger flipping while the customer is on the phone.
- **Customer & Asset Registration with Visual Proof:** Capture customer details and register equipment. Crucially, staff can **attach photos or videos** of the device's condition at the time of intake.
 - *Benefit:* Protects the business from claims that "the screen was fine when I gave it to you."
- **Job Card Creation & Advance Payments:** Generate a unique digital Job Card for every request. Crucially, this step includes the ability to **record upfront advance payments** to secure customer commitment and reduce the rate of abandoned devices.
- **Abandoned/Unclaimed Device Management:** Specialized status tags to organize and filter out devices that have been sitting beyond the collection window, keeping the active dashboard clean while maintaining the records.

Module 2: Workshop & Repair Operations

Designed for carry-in items requiring component-level or module-replacement services.

What this solves: Removes ambiguity about who worked on a device and what was done to it, establishing clear accountability and ensuring quality checks happen before the customer is notified.

- **Technician Assignment:** Route specific Job Cards to internal technicians based on complexity and workload.
- **Repair Logging:** Technicians can securely log diagnostic notes, actions taken, and basic text details of parts consumed during the repair.
- **Quality Control (QC) Checkpoint:** An optional workflow step to verify repair quality before notifying the customer.

Module 3: Field Service Management

Optimized for On-Site Services like CCTV, UPS, and Car Accessory installations.

What this solves: Replaces disorganized WhatsApp messages or phone calls for dispatching, giving field techs clear digital instructions and giving the MD instant confirmation the moment an off-site job is finished.

- **Field Dispatch:** Assign on-site jobs to specific field technicians with scheduled dates and times.
- **Technician Mobile View:** A mobile-friendly interface for technicians to view assigned jobs, customer addresses, and job requirements while on the road.
- **Visual Proof of Completion:** Field technicians can **upload photos/videos** of the completed installation (e.g., CCTV camera angle, clean wiring) directly via their mobile interface.
- **Job Completion Trigger:** Technicians can mark an on-site job complete from their mobile

view, instantly updating the MD's dashboard and seamlessly triggering the WhatsApp sign-off module.

Module 4: AMC & Contract Management

To proactively manage Lifecycle Maintenance and Annual Maintenance Contracts.

What this solves: Prevents missed preventative maintenance visits, ensuring contract compliance, avoiding angry customers, and protecting recurring revenue streams.

- **Contract Logging:** Record AMC details, including start/end dates, specific equipment covered, and service level terms.
- **Preventive Maintenance (PM) Reminders:** Automated dashboard alerts for upcoming scheduled service visits.

Module 5: Customer Communication (Optional Add-on)

To enhance the customer experience through proactive, interactive updates and solve the "abandoned device" problem.

What this solves: Drastically reduces the number of incoming customer calls asking for status updates, proactively clears out finished inventory from your shelves, and secures verified proof of delivery.

- **Automated Status Alerts:** Notifications sent to the customer's WhatsApp for key events.
- **"Drip" Reminder System for Pickups:** Automated follow-up messages sent to customers if their device has been marked "Ready for Delivery" but remains uncollected (e.g., 3 days, 7 days, 15 days).
- **Secure OTP & Direct Feedback (Highlighted Benefit):** When field technicians complete a job, send a secure OTP via WhatsApp for customers to verify the delivery. Crucially, allow the customer to submit their **satisfaction rating directly within the WhatsApp chat**. This highly convenient method guarantees a much higher response rate for feedback and ensures verified, fraud-free service delivery.

(Note: This module requires discussion regarding third-party WhatsApp API costs and client preference).

Module 6: Management Dashboards & Analytics

Visualizing shop performance to give the MD total control and insight at a glance.

What this solves: Replaces end-of-month guesswork with instant, actionable insights. Allows management to easily spot bottlenecks, track revenue, and monitor staff efficiency without micromanaging.

- **The "Aging Jobs" Report:** Highlights jobs open for an unusual amount of time, allowing management to instantly identify and resolve bottlenecks.
- **Service Throughput (Intake vs. Dispatch):** A visual comparison of daily/weekly incoming devices versus completed deliveries.

- **Technician Workload & Output:** Metrics showing jobs assigned and completed per technician.
- **Revenue Summary (Service vs. Advances):** A quick snapshot of daily advance payments collected at the front desk versus final settlement amounts.

3. Out of Scope for Phase 1

- **Comprehensive Inventory Management:** (Stock levels, supplier management, barcode scanning, and automated stock deduction). *Note: Phase 1 will allow text-based logging of parts used, but will not deduct from a live digital inventory.*
- **Accounting & POS:** Full financial accounting, payroll, and point-of-sale billing for retail walk-ins.

4. Next Steps

1. **Review & Refine:** Review the proposed features and provide feedback.
2. **Approval:** Formal sign-off on the Phase 1 feature list.
3. **Timeline & Commercials:** Upon approval of this scope, a detailed development timeline and cost proposal will be provided.