

Executive Summary: Custom ERP Phase

1

Project: Custom ERP Development - Service Automation Phase

Client: KAILASH ELECTRONICS & MOBILES

Date: June 30, 2026

The Goal

To completely digitize and automate the service and repair workflow, giving management 100% remote visibility and control over shop operations, both in-store and out in the field.

Key Pain Points Solved in Phase 1

1. **The "Phone Tag" Problem:** Management can check the live status of *any* job (from yesterday or 6 months ago) instantly from their phone, eliminating the need to call shop staff or flip through paper ledgers while a customer is waiting.
2. **Abandoned Inventory:** New workflows enforce upfront advance payments and automated WhatsApp reminders to ensure customers pick up their devices, protecting your revenue and shelf space.
3. **Unverified Field Work:** Field technicians get clear digital dispatches, and customers provide verified sign-offs and feedback via WhatsApp OTP upon completion.

Core Modules Overview

- **1. Centralized Service Desk (Remote Intake):** The core system to create digital Job Cards, register assets, record advance payments, and instantly search past jobs. Includes your remote MD dashboard.
- **2. Workshop & Repair Operations:** Internal tracking for carry-in repairs. Assign jobs to specific technicians and log parts/actions taken to ensure accountability.
- **3. Field Service Management:** Dispatch on-site jobs (CCTV, UPS) to field technicians who can view and complete tasks via a mobile-friendly interface.
- **4. AMC & Contract Management:** Digital logs of maintenance contracts with automated reminders for upcoming scheduled service visits.
- **5. WhatsApp Customer Communication (Add-on):** Automated status updates (e.g., "Ready for Pickup"), automated reminders for uncollected devices, and secure OTP sign-off + feedback collection for completed field jobs.
- **6. Management Dashboards & Analytics:** Live visual reports on shop performance, including an "Aging Jobs" tracker to spot bottlenecks, technician efficiency, and daily revenue snapshots.

Out of Scope for Phase 1

Full inventory/stock deduction (Phase 1 will log parts used as text, but won't deduct from a live digital inventory database) and POS/Accounting for retail walk-ins.

Next Steps

Review this scope, provide any final feedback, and upon your approval, we will share the project timeline and cost estimate.