

# ERPNext: Self-Drive Starter Pack

Ideal for SMBs in Trading, Distribution, and Manufacturing



## 1. Overview

The Self-Drive Starter Pack is designed to enable rapid configuration and migration to ERPNext and/or Frappe HR. This pack is ideal for SMBs in trading, distribution, and manufacturing seeking a quick and structured transition using out-of-the-box features.

- **By an official Frappe Partner - Havara Technologies Pvt. Ltd.**
- Hosted on Frappe Cloud (Just ₹2,050 Per Month - No Per User Licence Cost)
- **Focused on master setup and core configurations only**

## 2. Pack Options & Commercials (One-Time Cost)

Pack	Scope	Hours	Validity	Price *
<b>Core ERPNext</b>	Accounting, Selling, Buying, Inventory	40 hrs	30 Days	₹80,000
<b>Core + Manufacturing</b>	Above + Manufacturing	70 hrs	60 Days	₹1,40,000
<b>Frappe HR</b>	HRMS / Payroll	30 hrs	30 Days	₹60,000
<b>Frappe CRM</b>	CRM	15 hrs	15 Days	₹30,000
<b>Frappe Helpdesk</b>	Helpdesk	15 hrs	15 Days	₹30,000

GST (18%) applicable extra \*

## 3. Detailed Scope

### 3.1 Core ERPNext Modules

#### A. Accounting

- Masters: Chart of Accounts, Fiscal Year, Financial Book, Accounting Period, Mode of Payment, GST - India compliance/ Tax Withholding Category
- Transactions: Payment / Receipt, Journal Voucher, Debit / Credit Note, Inter Bank, Bank Reconciliation, Payment Reconciliation

- Reports: Balance Sheet, Trial Balance, Profit & Loss, Outstanding Receivable / Payable (Detailed & Summary), General Ledger, TDS Summary, Cash Flow
- Settings: Accounts Settings and GST Settings
- Exclusions: Multiple Entities, Cost Centers, Budgeting, Multi-currency, etc.

## B. Selling

- Masters: Customer List (Address & Contacts), Item Master, Price List, Territory
- Transactions: Quotation, Sales Order (with Sales Team & Partner), Delivery Note, Sales Invoice, Accounting & Inventory Impact
- Reports: Sales Analytics, Sales Order Trends, Inactive Customers, Item-wise Sales History, Pending SO Items, GSTR1, GST Registers
- Settings: Selling Settings
- Exclusions: Loyalty Programs, E-commerce Integrations, etc.

## C. Buying

- Masters: Supplier Master (Address & Contacts), Terms & Conditions, Payment Terms
- Transactions: Material Request, RFQ, Supplier Quotation (Manual/Portal), Purchase Order, Purchase Receipt, Purchase Invoice, Import Purchase, Landed Cost Voucher
- Reports: Purchase Analytics, Supplier Reports, Item Purchase History, GST Purchase Registers, Reconciliation Tools
- Workflow: Single-Level Purchase Order Approval
- Exclusions: Multi-level Approval Workflows, Supplier Portal Setup, etc.

## D. Inventory

- Masters: Item Setup, Item Group, Warehouse, UOM, Batch, Serial No., Brand
- Transactions: Stock Entry, Stock Reconciliation
- Reports: Stock Ledger, Stock Balance, Reorder Level Report, Batch Expiry Status
- Settings: Stock Settings

## 3.2. Manufacturing

- Masters: BOM, Operations, Workstation
- Transactions: Work Orders (Single & Multi-Level BOM), Job Card, Production Stock Entries

- Reports: Work Order Summary, BOM Stock Report, Production Analytics, Job Card Summary, Work Order Stock Reports
- Settings: Manufacturing Settings
- Exclusions: Capacity Planning, Production Forecasting, Custom Planning Algorithms, PLC / Machinery Integrations, etc.

### 3.3 Frappe HR

#### A. HRMS

- Configuration: Employee Master, Leave Management, Attendance/Shifts, Leave Policies, Expense Claims, Standard Approval Workflows
- Customisation (Basic - up to 10 Fields without any validation logic): Adding Fields to HRMS DocTypes (Skills, Certifications etc.)
- Exclusions: Advanced KPI Frameworks, Third-party Integrations

#### B. Payroll

- Setup: Salary Structures, Payroll Cycle, Standard Tax Configuration (India), Salary Slip Format
- Exclusions: Multi-country Payroll, Advanced Scripted Calculations

### 3.4 Frappe CRM

- Masters: Lead Source, Industry, Territory
- Transactions: Leads, Deals, Contacts, Organizations, Note, Tasks
- Exclusions: SLA Configuration, Auto Assignment, Email Automation, Integrations, etc.

## 4. Included in the Starter Pack

- ERPNext installation on Frappe Cloud
- Standard user roles
- One SMTP setup - Up to 5 Email Notifications
- Standard module-wise dashboards
- Core system configuration
- Data Import one session
- Naming series one session

- Opening balances
- User Training One Session
- Product Documentation from Frappe

## 5. Excluded | Out of Scope (Available as Add-ons)

The following items are excluded from the starter pack. However, all are available as add-ons and require additional hours (per unit), which can be purchased separately.

- Custom Print Format - Basic: 8 hrs / Advanced: 25 hrs
- Custom Scripting (Python / server scripts) - Effort will be estimated based on complexity
- API Integrations (Biometric / Bank / Payment Gateway / Communication) - Effort will be estimated based on complexity
- Data Cleaning and Data Import/Migration (customer must provide clean Excel/CSV data) - Effort will be estimated based on complexity
- Additional Training Sessions - Billed hourly (Minimum: 2 hrs)
- Additional Form (up to 10 Fields) - 8 hrs
- Additional Data Points (Set of 10 Fields) - 8 hrs
- Custom Workspace / Dashboard - 5 hrs
- Custom Workflow - Basic: 5 hrs / Advanced: 20 hrs
- Notification Automation - Basic: 5 hrs / Advanced: 20 hrs
- Post go-live support beyond Day 1 (Under AMC)
  - AMC-36: ₹50,000 | 1-year validity | 36 tickets | SLA: 24 hrs
  - AMC-12: ₹20,000 | 1-year validity | 12 tickets | SLA: 24 hrs
  - Complex tickets requiring more than 24 hours will be charged based on actual effort (in multiples of tickets)
  - New customizations and enhancements are not covered under AMC
- Custom Query Report - Basic: 8 hrs / Advanced: 25 hrs
- Custom Roles & Permission (Set of 5 roles) - 8 hrs
- UAT Testing Cycle

- Includes UAT demo, Testing Environment Setup, Use Case Documentation, 15 days of Testing Support, and UAT sign-off - 15 Days: ₹50,000 / 30 Days: ₹75,000

## 6. Commercial Terms

- 100% advance payment required
- 18% GST extra
- Refunds are not provided once work has commenced or after project start date
- Scope strictly limited to items listed in this document
- Applicable for customers with < 50 users (SMBs)
- Additional hours | Add-ons : ₹2,000 per hour + GST

## 7. Important Terms

- Frappe Cloud subscription is billed separately (Just ₹2,050 Per Month - No Per User Licence Cost)
- Product warranty available only on Frappe Cloud plans above ₹4,100 + GST/month
- Any deviation requires a formal change request and more hours; validity starts from the project start date of the hours covered in the starter plan.
- The pack covers only the number of hours specified. If additional hours are needed, you must purchase a new pack.
- Implementations are conducted remotely only.

## 8. Customer Responsibilities

To ensure successful implementation, the customer must:

- Adhere strictly to the scope
- Nominate a Project Champion
- Ensure data readiness
- Ensure timely internal approvals
- Ensure user availability for training