# Dedicated Resource Plan

Finbyz Tech Pvt Ltd is pleased to offer our dedicated Developer/IT Consultant for ERP Implementation services. Our approach ensures that you receive the highest quality of service, tailored to your specific needs, while maintaining full transparency and accountability.

# Why Choose Finbyz Tech?

## 1. Proven Track Record

Finbyz Tech has a deep-rooted expertise in ERPNext, having successfully executed over 140+ projects across more than a decade. Our experience spans a wide array of industries, including Chemical, Pharmaceutical, Engineering, Oil and Gas, Agro Commodity, Textile, Ceramics, FMCG, Retail, and more. This diverse industry experience has equipped us with a nuanced understanding of the unique challenges and requirements that different sectors face. We don't just implement ERPNext—we tailor it to your specific industry needs, ensuring that the solutions we deliver are not only innovative but also highly effective and practical for your business context. Our proven track record is a testament to our commitment to excellence and our ability to consistently deliver projects that meet and exceed our clients' expectations.

## 2. Swap resource as required

We recognize that no two projects are the same and that different stages of a project may require different skill sets. At Finbyz Tech, we offer you the flexibility to swap resources as per your project's evolving needs. Our developers are specialists in various domains, such as Print Formats, JavaScript, Debugging, Web Development, Script Reporting, and more. We have consultants who are specialized skills for specific modules of ERP like Sales, Purchase, HR, Manufacturing or Accounting. This means that if a specific task arises that requires specialized expertise, you can easily swap your current resource with another who is more suited to the task at hand. This flexibility ensures that you are always getting the right expertise at the right time, allowing you to fully leverage our entire team's capabilities. When you partner with Finbyz Tech, you're not just hiring a single developer/consultant —you're gaining access to a versatile team of experts who are ready to help you maximize the value of your project.

## 3. Automated time tracking

Transparency and accountability are at the core of our service offering. Our advanced automated time tracking system ensures that you have complete visibility over the time and effort invested in your project. Every working hour is meticulously recorded, and you have real-time access to this data, allowing you to see exactly how many hours each resource is dedicating to your project daily. But we don't stop there—our system also provides detailed breakdowns of how time is spent, including the applications used, websites visited, and even random screenshots taken every five minutes. This level of detail ensures that you are getting full value for your investment, with 100% transparency on the activities of your outsourced resources. You can rest assured knowing that your project is progressing as planned, with complete accountability at every step.

# Scope of Services

For all opensource software technologies, implementation, support and maintenance is the key to making adoption of system successful. We offer package custom designed keeping in mind your needs for the implementation. The services which can be covered under this dedicated resource based implementation package are as below.

## 1. User Training

User training is crucial to make users adopt ERP effectively. Here we conduct module wise training for your company to implement ERP successfully. During training sessions we also note down required configuration for each module. These configuration can be carried out post training session to make ERP Suitable for your business.

a) The training session can be demo of specific module or for requirement gathering.
b) We can arrange training sessions for your internal project in charge or for team members.
c) The training session can also be required for any specific challenge you are facing in ERP.
d) In most cases there are some pre-checks on configuration for each module, the consultant needs to carry out before conducting user training sessions. So it's generally requested to be planned minimum 2 days in advance.

## 2. Functional Guidance

Given the large scope of ERP, to get maximum out of available features, users may need expert support to carry out operations smoothly.

e) We will provide needed handholding on technical doubts regarding ERP.
f) The doubts can be related to any new or existing features of ERP.
g) For non-technical training, the user will be guided to use existing documentation, support will be limited to clearing the doubts.
h) It is suggested your company must designate a maximum of 2-3 people to co-ordinate on user queries, all user queries should be routed through them, this will reduce your support cost as queries will be better filtered at your end.

## 3. Role permissions

The Access right management in ERP has been designed in two stages. First User roles (eg Sales User, Sales Manager, Stock Manager) are created. Then access rights to various documents (eg Customer/ Lead etc) given to user roles. Any new user can be assigned one or more User Roles will give him access to all the documents allowed to the assigned User Role. Further, you can restrict access of user to specific permitted documents through User Permissions.

a) Finbyz will provide needed guidance on creating User Roles and User Permissions.
b) The discussion can cover how to achieve decided objective of user permissions within the existing role permission framework structure.
c) Finbyz will also support you on changing the field permission levels to achieve desired results.

## 4. Workflow Design

With workflows you can rewrite how a particular document / transaction is approved in ERP. You can set multiple levels of approval for any specific document like purchase order, sales invoice, leave application etc. through workflows. Our support service will cover below points on this.

a) Guidance on creating workflows in ERPnext for the set objective.
b) Discussions on required roles and user permissions for managing workflow objectives.
c) Setting up email alerts for different workflow states though standard features.

## 5. Print Formats

Print formats of any document are the way any external or internal person is review that document. Erp allows you to build or configure multiple print formats for any document through Print format builder or custom print format.

a) Finbyz will provide needed hand-holding for changing print formats through print format builder.
b) Any minor changes to existing custom print formats can be done as per user request.
c) We can also design custom print format written in Jinja templating language for any document.

# 6. Notification Settings

You can configure various notifications for users, customers, suppliers etc. through Email, whatsapp (Subject to additional service) or system notifications. These notification can be triggered on various document events like save, submit or on specific method.
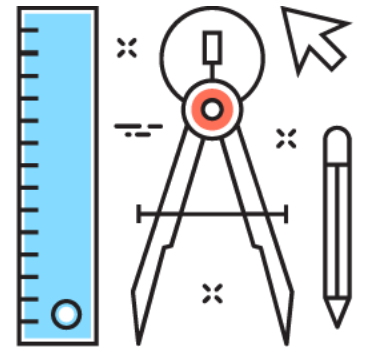
a) Finbyz will create required alerts with dynamic content. These will be designed in HTML templates with required jinja formatting by developer.

b) If whatsapp integrations is subscribed, we can also set approved templates with dynamic content as alerts for whatsapp messages.

c) We can trigger these alerts on various events allowed in ERP.

# 7. Report Configuration

ERP allows you to build custom reports using report builder functionality. Further you can also customize existing reports by adding related columns or removing related columns. Still user may require some hand holding for making these changes for desired data.

a) Finbyz can suggest you which report has most relevant data which you can customize to get your desired functionality.

b) Finbyz will support you in generating required reports with effective use of standard auto filter function.

c) We will also help you set up required auto email report functionality.

d) If totally new report to be developed we can also achieve it through custom script report or sql query.

# 8. Data Import

All the documents in ERP are importable through an excel file. However before importing any data, one must understand existing data structure of ERP, and convert the data provided in the format acceptable for ERP. This data cleaning and pre-processing is time consuming activity.

a) Finbyz will help you understand ERP's data structure to prepare required data import format in excel.

b) We can help you preprocess data to be imported in the system.

c) Add custom fields as per data provided to capture full information in ERP.

d) Create multiple import files as per ERP format to import data in related linked doctypes to import the main file.

e) We can import data in ERP and highlight the errors along with data which was not imported.

## 9. Server Support

Even though we recommend frappe cloud hosting for ERP, which makes dev-ops very easily manageable. But we respect the freedom of hosting the open source ERP at any hosting of your choice. This also requires us to maintain your server.

a) Finbyz will ensure Linux system us updated time to time.
b) ERP updates also require some dependencies to be updated or added to the server before upgrade, finbyz will ensure the same.
c) There are possible server related Tickets, which can also hinder performance of ERP Software finbyz will try to find and resolve these Tickets.

## 10. ERP Updates

ERP is constantly updating system, where minor versions keep releasing every week, and one major version with many new features getting released every year. Finbyz can update your system to latest version at no additional cost in support contract.

a) Finbyz will update the system on client request for any relevant feature or bug fix which has been launched in the recent update.
b) Finbyz will upgrade the ERP to latest major version on mutually agreed date once it's stable.
c) Upgrades can create some issues with existing custom functionality, Finbyz will resolve these challenges to make sure smooth experience after upgrade.

## 11. ERP Maintenance

Given dynamic nature of ERP and ever evolving system through updates, there is always a possibility of some minor bugs. These bugs require us to study latest code, find possible reasons, try various possible solutions to give resolution to the client.

a) Finbyz will resolve all bugs reported which are created by an update or upgrade.
b) Requests related to critical business requirements will be given prioritized to provide faster resolution.

# 12. Customizations

Users may require few minor customizations like adding fields, validations at various forms, fetching data from one form to another through link fields, adding some filters to data, etc. Or there might by a major functionality which needs to be developed from scratch. Finbyz will honour these user requirements as part of this package.

    a) Desired functionality requirement will understood and possible ways of achieving the functionality will be suggested.

    b) Finbyz will develop the solution and provide first cut for customer feedback.

    c) On successful testing and user feedback the solution will be deployed on live site.

# 13. Website

You can build website on top of ERP, making your ERP as content management system for your website. This also allows you to you list items directly from ERP to your website and enable ecommerce for the same. We can help you create or maintain your website built on ERPNext.

    a) Develop aesthetically pleasing website through website builder of frappe.

    b) Resolve any Tickets highlighted by user on website.

    c) Ensure all built functionalities are working without any flaws after

    d) Help users to generate desired pages from items and webpage.

# Benefits of Dedicated Resource

## 1. Faster Implementation Process

By having a dedicated resource work consistently for a fixed number of hours each day, the ERP implementation process accelerates. Unlike a traditional setup where attention may be divided between multiple projects, the focused approach ensures that timelines are met more efficiently, reducing the overall implementation time.

## 2. Increased Transparency

Dedicated resources offer unparalleled transparency. The client gains a direct line of sight into day-to-day activities, progress, and challenges. This approach allows for more seamless communication and immediate adjustments if required, resulting in better alignment between the client's expectations and the actual implementation.

## 3. Resource Supported by Hierarchy

When you work with Finbyz Tech, you don't just hire a consultant/ developer—you gain access to a whole ecosystem of support. Each of our resources is backed by a team of senior professionals who provide ongoing mentorship, guidance, and support. This hierarchical structure ensures that any challenges or roadblocks encountered by your resource are quickly addressed with the help of more experienced senior team members. This approach minimizes project delays and ensures that even the most complex issues are resolved efficiently.

## 4. Continuous Support and Guidance

Since the dedicated resource is fully immersed in the project, they can provide real-time support to the client's team. This ensures quicker troubleshooting, on-the-spot training, and guidance whenever required, which enhances the overall user experience during and after the implementation.

## 5. Long-Term Trust Building

By working closely with a single resource throughout the ERP implementation journey, the client develops a long-term working relationship. This not only builds trust but also allows the resource to become a valuable extension of the client's team, facilitating better collaboration and a sense of partnership.

# Pricing Structure

Our pricing model is transparent and designed to provide value while maintaining the highest service standards.

## Resource based Pricing

- Full-Time Dedicated
- Part-Time (Half Day)
- Part-Time (Quarter Day)

## Onsite Deployment Terms

If the project requires the resource to be available onsite for a certain number of days, Finbyz Tech is committed to providing this flexibility. The following terms will apply:

### Resource Availability Onsite:

The resource will be made available onsite at your location as per the project's specific needs. The minimum notice period required for scheduling onsite deployment is 10 days. The duration of onsite deployment will be limited to maximum 15 days per visit.

### Client-Responsibility for Major Expenses:

The client will be responsible for covering or reimbursing all major expenses associated with the onsite deployment. These include, but are not limited to, the following:

- **Travel Expenses:** Airfare, train, or other transportation costs to and from the client's location.
- **Lodging:** Accommodation expenses for the duration of the onsite stay.
- **Meals:** Daily meal expenses beyond what is covered by the per diem.
- **Local Transportation:** Transportation costs incurred while the resource is onsite, including taxis, ride-shares, or car rentals as necessary.

### Per Diem Cost:

A per diem charges for per day/per resource will apply for each day the resource is onsite. This per diem is intended to cover incidental expenses such as local travel, minor meals, and other day-to-day expenditures that the resource might incur. This amount is in addition to the standard monthly rate of resource and major expenses mentioned before.

This ensures that the resource can focus on delivering high-quality work without being concerned about out-of-pocket expenses for minor daily needs. The per diem allows for smooth and efficient operations while onsite, ensuring that the resource remains productive and fully dedicated to your project.

# Payment Terms

### Initial Advance Payment:

For no commitment contract, there is no initial advance payment required. The client can choose to start the service at full price without any discount.

For contracts with a 3-month commitment, an advance payment equivalent to the first month's billing is required upon signing the contract.

For contracts with a 6-month commitment, an advance payment equivalent to 1.5 months of billing is required upon signing the contract.

### Monthly Payments:

Whichever contract you choose, each month billing will be done at beginning of the service period and will be due within 7 days.

Please note this billing is in addition to advance collected for commitment period.

### Advance Adjustment:

The advance payment will be adjusted against the final month(s) of the contract. For a 3-month contract, the advance will cover the last month. For a 12-month contract, the advance will be spread across the last 1.5 months of billing.

### Onsite Deployment Charges:

All onsite deployment expense either should incurred by client or should be paid in advance. Per diem charges for selected tenure should be paid before travel date.

# Penalty-Free Exit Clause

If the client decides to terminate the contract before the agreed commitment period, they can do so by providing a **30-days** (For 3 month Contract) **and 45-Days** (For 12 Month Contract) written notice.

The advance payment will be non-refundable, but will be adjusted against the service provided in the notice period. There will be no additional penalties imposed. This clause reassures the client that they have flexibility while reinforcing the importance of the advance payment.