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# ERP Analysis Questionnaire & Information Gathering

## (Sample Only)

### Content

1.	General Information	2
2.	Product & Inventory Management	2
3.	Sales Management & CRM	2
4.	Point of Sale (POS)	3
5.	Distribution & Store Ordering	3
6.	Fleet & Driver Management	3
7.	Accounting & Finance	4
8.	Purchasing	4
9.	Manufacturing	4
10.	Human Resources	5
11.	Website	5
12.	eCommerce	5

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13.	Store Portal & Mobile Ordering	6
14.	Project Management	6
15.	Helpdesk & Repair	6
16.	Reporting & Dashboards	6
17.	Integration & Customization	7
18.	Data Migration & Security	7
19.	Scalability & Performance	7
20.	Implementation Preferences	7



GLOBAL SOLUTIONS

## 1. General Information

- 1) What are the primary pain points in your current processes or systems?
- 2) Are there any current active system/s in use? Please clarify.
- 3) What are the key deliverables or outcomes you expect from the ERP implementation?
- 4) Who will be the primary users of the system, and what are their roles, departments?
- 5) Do you have existing documentation on your processes, workflows, or systems?
- 6) Are there seasonal or cyclical variations in your business processes (e.g., sales peaks)?
- 7) What are the must-have features, and which can be deferred or phased?

## 2. Product & Inventory Management

- 8) What product types do you produce (e.g., fresh milk, yogurt, cheese)?
- 9) Do you track inventory by warehouse, locations, zone, vehicle...?
- 10) Are there packaging types (e.g., cartons, crates) that are used in receiving, production, or delivery?
- 11) Do you need alerts for low stock, expiry nearing, or replenishment rules?
- 12) How do you currently manage inventory across warehouses?
- 13) Are there products with expiration dates or lot (Batch) tracking requirements?
- 14) Are there any products managed in bundles or kits?
- 15) How do you handle inventory transfers between locations (middle-mile)?
- 16) What is your process for stock reconciliation and cycle (physical) count?
- 17) Are there any regulatory requirements for inventory management (e.g., for pharmaceuticals or food)?
- 18) Do you need automated alerts for low stock levels or reorder points?

## 3. Sales Management & CRM

- 19) How are sales leads currently generated and managed?
- 20) Do you have multiple sales channels (e.g., direct, wholesale, online)?
- 21) Please explain your typical sales process, from lead generation to order fulfillment.
- 22) How is pricing managed (fixed price list, customer-specific, promotions)?

- 23) Are there volume-based discounts or rebates?
- 24) Do you have programs to manage customers' loyalty?
- 25) How do you track sales commissions and performance for sales reps?
- 26) How do you handle sales returns, cancellations, or refunds?
- 27) Do you allow returns or replacements for expired/damaged goods?
- 28) Are there any recurring sales (subscriptions, standing orders)?
- 29) Do you require integration with external tools (e.g., e-commerce, payment gateways)?
- 30) How do you classify and segment your customers (e.g., by region, volume)?
- 31) Do you require customer activity tracking (calls, meetings, emails)?
- 32) How do you track the lifecycle of a lead, from generation to conversion?
- 33) Are there automated marketing workflows required (e.g., email campaigns)?

#### 4. Point of Sale (POS)

- 34) Do you have physical retail stores or require a POS system?
- 35) What are your key requirements for a POS system?
- 36) How do you currently manage sales and inventory at your retail locations?

#### 5. Distribution & Store Ordering

- 37) How are deliveries scheduled and assigned to delivery vehicles?
- 38) Is cash collection performed during delivery (COD)? If so, how is it tracked?
- 39) Do delivery vehicles act as mobile stock points?
- 40) What is the typical delivery frequency to stores or clients?
- 41) Do stores or customers have access to a portal or mobile app for placing orders?

#### 6. Fleet & Driver Management

- 42) How many vehicles are in your distribution fleet?
- 43) Do you assign specific drivers to specific delivery zones or customers?
- 44) Do you track vehicle maintenance schedules, fuel consumption, and insurance status?
- 45) Do drivers need mobile access to confirm deliveries, receive routes, or report issues?

## 7. Accounting & Finance

- 46) What are the financial statements and reports you are using in your business (e.g., P&L, Balance Sheet, Cash Flow Statement...)?
- 47) How are accounts receivable and payable currently managed?
- 48) Do you follow specific accounting standards (other than IFRS)?
- 49) Will your ERP cover more than one legal entity or branch?
- 50) Are there inter-company transactions?
- 51) How are budgets set, tracked, and managed?
- 52) Are there recurring invoices or subscription billing requirements?
- 53) How do you handle foreign exchange and multi-currency transactions?

## 8. Purchasing

- 54) How are purchase requests created and approved internally?
- 55) Do you control the purchase requests/orders by the available budget?
- 56) Do you have preferred/restricted vendors for certain items (e.g., raw materials)?
- 57) How do you manage vendor contracts and delivery agreements?
- 58) Do you evaluate vendor performance (e.g., delivery time, pricing accuracy, quality)?
- 59) Do you use blanket orders or long-term purchasing agreements?
- 60) Do you need to process a call-for-tenders?

## 9. Manufacturing

- 61) What are the key inputs and outputs of your manufacturing processes?
- 62) What is your factory structure and work centers (production lines)?
- 63) How do you manage Bills of Materials (BoM) and variants?
- 64) Do you manage BOM version updates?
- 65) How do you plan and schedule for production?
- 66) How do you track production costs (materials, labor, overhead)?
- 67) Are there specific quality control procedures (quality gates) at different production stages?

- 68) How do you handle machine or equipment maintenance schedules?
- 69) Are there custom workflows for subcontracting or outsourcing parts of production?

## 10. Human Resources

- 70) How do you manage employee records and documentation?
- 71) Do you have a performance appraisal or review system?
- 72) How do you track attendance, shifts, and overtime?
- 73) Are there regional payroll compliance requirements (e.g., tax calculations, penalties, and rewards labor law)?
- 74) How do you manage and compute employees' payslips?
- 75) How do you manage recruitment workflows (job postings, applications, interviews)?
- 76) Do you require training and certification tracking for employees?
- 77) Are there employee self-service requirements (e.g., for leave requests, loans, Payslip review)?

## 11. Website

- 78) Do you require a website for your business?
- 79) What is the website structure (Site Map, Pages...)?
- 80) Will the customers have access to the website (submit tickets, review orders and invoices...)?
- 81) Will the website integrate with the internal CRM (collect leads and visitors' messages)?

## 12. eCommerce

- 82) What platforms are you using for online sales currently, if any?
- 83) How do you manage product pricing, descriptions, and categories?
- 84) What payment methods are required (credit cards, PayPal, etc.)?
- 85) Do you handle drop shipping or direct fulfillment from suppliers?
- 86) How do you manage customer reviews and feedback on products?
- 87) Are there any custom rules for shipping, taxes, or discounts?

88) Do you require integration with marketing tools for upselling or cross-selling?

### 13. Store Portal & Mobile Ordering

89) What actions should a store be able to do through the portal/app? (e.g., place order, check balance, download invoice)?

90) Should order placement be limited by quotas or outstanding financial balance?

91) Should the portal/app support multi-languages (e.g., Arabic, English)?

92) Do stores need access to their order history, pending deliveries, and payment status?

### 14. Project Management

93) How do you currently track project tasks and milestones?

94) How do you manage project budgets and costs?

95) Are there any dependencies or workflows between tasks in different departments?

96) Do you track time spent on projects (e.g., for billing)?

97) Do you handle external vendors or contractors in projects?

98) Do you have outside contractors (freelancers) who need limited access to their tasks?

### 15. Helpdesk & Repair

99) How do you currently manage customer support requests or service tickets?

100) If you offer repair services, briefly describe your repair process.

101) Do you need to track service level agreements (SLAs) or repair turnaround times?

102) What are your main challenges in customer support or repair management?

### 16. Reporting & Dashboards

103) What are the most important KPIs for your business?

104) Do different roles (e.g., sales, logistics, finance) need role-specific dashboards?

105) How do you currently handle reporting (Excel, manual, or via systems)?

106) Do you need integration with other reporting tools (e.g., Power BI)?

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## 17. Integration & Customization

- 107) Are there third-party systems you'd like to integrate with (e.g., HRMS, CRM)?
- 108) How frequently should data synchronize between systems (real-time, hourly, daily)?
- 109) Are there specific reports, workflows, or fields you would like customized?
- 110) Do you require any automated business rules or approvals based on thresholds?
- 111) Do you require integration with WhatsApp, SMS, or OTP service?

## 18. Data Migration & Security

- 112) What data will need to be migrated (e.g., customers, invoices, stock)?
- 113) Are there known issues with data quality (duplicates, outdated records)?
- 114) Do you have historical data that should be accessible in the system?

## 19. Scalability & Performance

- 115) How many users will need system access initially? What is the expected growth?
- 116) Do you anticipate high transaction volume (e.g., daily orders, stock movements)?
- 117) Are there specific system performance expectations or uptime requirements?

## 20. Implementation Preferences

- 118) Do you have internal IT resources who will be involved in the implementation?
- 119) How would you like to approach training for your team (Online / Onsite)?
- 120) What would you consider a successful implementation?