



ERPNext Implementation Checklist for Manufacturers

52 checkpoints, from business readiness to go-live. Tick each one before you move to the next phase.

How to use it: work through the sections in order with your implementation partner. Any unticked item in a section is a risk to carry into the next phase, so agree an owner and a date for it.

Business Readiness

- ☐ Executive sponsor identified and committed (not delegated to IT alone)
- ☐ Implementation team formed: module owners for Finance, Production, Stores, Purchase, and Sales
- ☐ Existing processes documented (purchase workflow, production flow, dispatch process)
- ☐ Go-live date set and frozen - mid-year financial year changes avoided
- ☐ Data ownership assigned: who cleans and validates each data set

Infrastructure Readiness

- ☐ Server provisioned (Hetzner / AWS / Frappe Cloud) with adequate RAM (minimum 8GB for production)
- ☐ SSL certificate configured for your domain
- ☐ Daily automated backup configured and tested with a restore drill
- ☐ Internet connectivity at factory floor confirmed (minimum 10 Mbps stable)
- ☐ Email / SMTP configured for system notifications

Chart of Accounts & Finance

- ☐ Chart of Accounts imported and mapped to correct account types (Asset / Liability / Income / Expense)
- ☐ GST tax accounts created and linked to correct tax templates
- ☐ TDS accounts configured for applicable sections (194C, 194J, 194Q)
- ☐ Bank accounts created and linked to correct GL accounts
- ☐ Cost Centers created (Factory, Admin, Sales) for department-wise P&L
- ☐ Fiscal year configured and opening period unlocked

Item & BOM Master

- ☐ All finished goods, raw materials, and packing materials created with correct Item Group and UOM
- ☐ HSN codes assigned to every item (mandatory for GST e-invoicing)
- ☐ Default Supplier and default buying price list linked to raw material items
- ☐ Bill of Materials (BOM) created for every finished good - reviewed and approved by production head
- ☐ Multi-level BOM tested for correct material explosion
- ☐ Operations and Workstations defined if using routing
- ☐ Item valuation method set (FIFO or Moving Average) - cannot be changed after stock entries are posted

Warehouse & Supplier / Customer Masters

- ☐ Warehouses created for Raw Material, WIP, Finished Goods, and Rejection stores
 - ☐ All suppliers imported with GSTIN, PAN, TDS applicability, and payment terms
 - ☐ All customers imported with GSTIN, billing/shipping addresses, and credit limits
 - ☐ Price lists created for domestic and export customers
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Opening Balances

- ☐ Opening stock entered for all warehouses with correct valuation rates
 - ☐ Opening accounts payable posted (supplier-wise pending bills)
 - ☐ Opening accounts receivable posted (customer-wise outstanding invoices)
 - ☐ Bank opening balances posted and reconciled against bank statements
 - ☐ Trial Balance in ERPNext matches Tally / previous system as of go-live date
 - ☐ Fixed assets entered with purchase date, value, and depreciation schedule
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India Compliance App Setup

- ☐ Company GSTIN entered and verified in India Compliance settings
 - ☐ E-invoicing enabled and NIC portal API credentials configured (if turnover > threshold)
 - ☐ E-Way Bill integration configured for goods movement above ₹50,000
 - ☐ GST tax templates created for IGST, CGST+SGST, and applicable exempt categories
 - ☐ Sample sales invoice tested: IRN generated, QR code printed, e-Way Bill created
 - ☐ GSTR-1 and GSTR-3B report validated with sample transactions
 - ☐ TDS deduction tested on a sample purchase invoice for applicable vendor
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Training & User Acceptance Testing

- ☐ Role-based user profiles created: Store Manager, Production Supervisor, Accountant, Purchase Officer, Sales Executive
 - ☐ Permissions tested: users can only access their module's documents
 - ☐ Module-wise training conducted with hands-on exercises (minimum 4 hours per module)
 - ☐ Full end-to-end transaction cycle tested: Purchase Order → GRN → Material Issue → Work Order → Production → Delivery → Invoice → Payment
 - ☐ UAT sign-off obtained from module owners before go-live
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Go-Live Day Verification

- ☐ All opening balances locked / accounting periods for pre-go-live months closed
 - ☐ First live purchase order raised, approved, and GRN posted successfully
 - ☐ First live sales invoice raised with valid IRN generated
 - ☐ First work order created from BOM and production entry posted
 - ☐ Backup confirmed running on schedule after go-live
 - ☐ Implementation partner on-call for first 2 weeks post go-live
 - ☐ Week 1 parallel reconciliation: stock report and P&L vs previous system
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Want this checklist run on your plant? Call **+91 77780 25099**, write to sales@exalixtech.com or visit exalixtech.com/contact.