ERP & Business Management System

How the System Actually Works

This is a full breakdown of the ERP & Business Management system, prepared by Basira, covering how a business's core operations connect: finance, sales, purchasing, inventory, manufacturing, projects, and more — all in one place.

Subject	ERP & Business Management Platform — Full Solution Detail
Scope	Accounting, procurement, sales & CRM, inventory, manufacturing, projects, assets, POS, quality, support, re
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INTRODUCTION

What This System Is

This is an Enterprise Resource Planning (ERP) platform that brings a company's core operations — finance, sales, purchasing, inventory, manufacturing, and projects — into a single connected system with one shared database. Instead of running separate tools for accounting, a CRM, an inventory tracker, and a task manager, every department works off the same records.

The system is hosted and managed by Basira, so the client doesn't need their own infrastructure or technical team to keep it running — setup, hosting, updates, and support are handled as part of the service.

Accounting & Finance	General ledger, invoicing, payments, budgets, multi-currency, financial statements.
Procurement (Buying)	Supplier management, purchase orders, purchase receipts, supplier scorecards.
Sales & CRM	Leads, opportunities, quotations, sales orders, customer tracking.
Inventory & Stock	Real-time stock across multiple warehouses, batch/serial tracking, stock transfers.
Manufacturing	Bills of materials, work orders, job cards, production planning, subcontracting.
Projects	Task planning, timesheets, budgets vs. actuals, billing by project.
Assets	Asset lifecycle from purchase to disposal, depreciation, maintenance scheduling.
Point of Sale	In-person billing that syncs instantly with inventory and accounting.
Quality Management	Quality inspections and standards compliance checks.
Support / Helpdesk	Ticketing, resolution tracking, customer communication.
Website & E-commerce	An online store connected directly to inventory and accounting.
Reports & Analytics	Built-in financial, sales, inventory, and operational dashboards.

CORE FLOW

How a Transaction Flows Through the System

The core value of an ERP system is that departments stop working off disconnected copies of the same information. A typical order moves like this.

1

Lead & Opportunity (CRM)

A prospective customer starts as a Lead, tracked with contact details and source. As the conversation progresses, it becomes an Opportunity, giving the sales team a pipeline view of deals in progress rather than scattered notes or spreadsheets.

2

Quotation & Sales Order

Once terms are agreed, a Quotation is issued, and on acceptance it converts into a Sales Order — the confirmed commitment to deliver goods or services at a set price.

3

Stock & Delivery

The Sales Order automatically reserves or checks stock availability. A Delivery Note is generated when goods ship, which updates warehouse stock levels in real time — no separate inventory spreadsheet to reconcile afterward.

4

Invoicing & Payment

A Sales Invoice is raised from the Sales Order (or delivery), and once payment is received, a Payment Entry reconciles it against the invoice. The general ledger updates automatically — accounting doesn't re-enter what sales already recorded.

5

Purchasing Mirrors the Same Flow

On the buying side, a Material Request (raised manually or auto-generated when stock runs low) becomes a Purchase Order, then a Purchase Receipt when goods arrive, then a Purchase Invoice for payment — with supplier performance (on-time delivery, quality) tracked over time.

FINANCE

Accounting & Finance in Detail

Chart of Accounts & General Ledger

A configurable Chart of Accounts reflects how the business actually categorizes income, expenses, assets, and liabilities. Every transaction across the system — a sale, a purchase, a payroll run, an asset purchase — posts to the general ledger automatically, giving one true source for the company's financial position.

Accounts Receivable & Payable

Outstanding customer invoices and supplier bills are tracked with aging reports, so it's clear at a glance what's overdue on either side, and payment reminders can be automated.

Multi-Currency & Multi-Company

Transactions can be recorded in a currency other than the base reporting currency, with exchange rate handling built in. Organizations with more than one legal entity can run them as separate companies within the same system while still consolidating reports where needed.

Budgeting & Financial Statements

Budgets can be set per cost center or project and compared against actuals. Standard financial statements — profit and loss, balance sheet, cash flow — are generated directly from live data rather than compiled manually at month-end.

Bank Reconciliation

Bank transactions can be imported and matched against recorded entries, reducing the manual work of confirming that the books match what actually happened in the bank account.

BUYING

Procurement & Supplier Management

Requests & Purchase Orders

A Material Request can be raised manually by any department or generated automatically when stock falls below a reorder threshold. Once approved, it becomes a Purchase Order sent to a chosen supplier.

Supplier Comparison & Scorecards

Where multiple suppliers quote on the same request, a Supplier Quotation comparison makes it easy to pick the best offer. Over time, a Supplier Scorecard tracks delivery reliability, quality, and pricing consistency, which matters for renegotiating terms or deciding who to keep using.

Receiving & Invoicing

Goods received are logged as a Purchase Receipt, checked against what was ordered, and a Purchase Invoice is raised for payment — with any discrepancies (short shipment, damaged goods) flagged before payment goes out.

REVENUE

Sales & Customer Relationship Management

Pipeline Management

Leads and Opportunities give the sales team a structured pipeline instead of relying on memory or a spreadsheet — what stage each deal is at, what it's worth, and what the next action is.

Quotations & Orders

Quotations can include custom pricing, discounts, and terms, and convert directly into Sales Orders without re-entering the same information.

Customer & Contact Management

Every customer has a single record covering contact details, order history, outstanding balance, and communication log, so any team member can see the full relationship at a glance rather than digging through email threads.

Territory & Sales Team Tracking

Sales can be organized by territory or assigned salesperson, with performance reports showing who's closing what, useful for commission calculations or coaching.

STOCK

Inventory & Warehouse Management

Multi-Warehouse Stock Tracking

Stock levels are tracked in real time across as many warehouses or storage locations as the business operates, with visibility into what's where at any moment.

Batch & Serial Number Tracking

Products that need traceability (expiry dates, warranty tracking, recalls) can be tracked by batch or individual serial number, linking a specific unit back to its purchase and sale history.

Stock Transfers & Adjustments

Moving stock between warehouses, or adjusting for damage, loss, or physical count discrepancies, is logged as a formal transaction — keeping the recorded stock level accurate and auditable rather than adjusted informally.

Reorder Automation

Reorder levels and quantities can be set per item, automatically triggering a material request when stock runs low, so purchasing isn't relying on someone noticing a shelf is empty.

PRODUCTION

Manufacturing

Bills of Materials (BOM)

A BOM defines exactly what raw materials and operations go into producing a finished item, including multi-level BOMs where a sub-assembly is itself built from other components.

Production Planning & Work Orders

Based on sales orders or forecasted demand, a Production Plan calculates what needs to be manufactured and when. This generates Work Orders, which reserve the necessary raw materials and schedule the production run.

Job Cards & Shop Floor Tracking

Individual production steps are tracked as Job Cards, capturing actual time and materials used at each stage — useful for spotting bottlenecks or comparing planned vs. actual production cost.

Subcontracting

Where part of production is outsourced to a third party, subcontracted Work Orders track materials sent out and finished goods received back, keeping that portion of the process visible in the same system rather than off the books.

Quality Inspections

Quality checks can be required at incoming (raw material), in-process, or outgoing (finished goods) stages, with pass/fail criteria and rejection tracking built into the production flow.

DELIVERY

Projects & Timesheets

Task & Milestone Planning

Projects break down into tasks with assigned owners, dependencies, and deadlines, giving a clear view of what's on track and what's slipping.

Timesheets & Billing

Team members log time against specific projects or tasks. For client-billed work, that time converts directly into a Sales Invoice, so billing doesn't require a separate manual reconciliation between timesheets and invoices.

Budget vs. Actual Tracking

Each project can carry its own budget, with actual costs (labor, materials, expenses) tracked against it in real time — surfacing cost overruns while there's still time to act, rather than at project close.

EQUIPMENT

Asset Management

Asset Lifecycle

From purchase to disposal, each asset (equipment, vehicles, IT hardware) has a record tracking its acquisition cost, location, assigned custodian, and current status.

Depreciation & Value Adjustment

Depreciation is calculated automatically according to the method and schedule configured for each asset category, feeding directly into the accounting records without a separate spreadsheet calculation.

Maintenance Scheduling

Recurring maintenance can be scheduled per asset, with reminders before service is due — useful for equipment where downtime from a missed service is costly.

FRONTLINE OPERATIONS

Point of Sale, Quality & Support

Point of Sale

For businesses with in-person retail transactions, a Point of Sale interface handles fast billing — scanning or selecting items, applying discounts, accepting multiple payment types, and issuing receipts — while syncing stock and accounting in the background automatically. It works online or offline, syncing once connectivity is back, so a temporary internet outage doesn't stop sales.

Quality Management

Quality Inspection templates define what's being checked and against what standard, whether that's incoming raw materials, in-process production, or finished goods before shipment. Results are logged per inspection, with rejected items flagged before they move further down the process — catching problems before they reach a customer rather than after.

Support & Helpdesk

Customer issues are logged as Tickets, routed to the right team, and tracked through to resolution with a visible history of communication. Response-time and resolution-time reporting makes it possible to see where support is falling behind before it becomes a customer complaint pattern.

Website & E-Commerce

An online store can be built directly on top of the same product and inventory data already in the system — no separate e-commerce platform to keep in sync. Orders placed online post directly as Sales Orders, stock updates automatically, and payment reconciliation follows the same flow as any other sale.

VISIBILITY

Reports & Analytics

Financial Reports

Profit and loss, balance sheet, cash flow, accounts receivable/payable aging, and budget-vs-actual reports are generated directly from live transaction data.

Operational Reports

Stock ageing, reorder reports, production efficiency, project profitability, and sales/purchase trend analysis are available out of the box, without building custom dashboards from scratch.

Custom Dashboards

Where the built-in reports don't cover a specific need, custom reports and dashboards can be configured around the organization's own metrics.

BEFORE ADOPTING

Access, Security & Localization

A few practical points worth knowing before rolling this out to a team.

Role-Based Access

Every user only sees and acts on what their role permits — a salesperson can't approve their own discount beyond a threshold, a warehouse clerk can't see payroll data, an accountant can't edit a sales order after invoicing. Permissions are configured per role, not per person, so managing access as the team grows stays manageable.

Multi-Company & Multi-Currency

Organizations operating more than one legal entity, or transacting in more than one currency, are supported natively — each company's books stay separate while still allowing consolidated reporting where needed.

Hosting, Backups & Data Ownership

Basira hosts and manages the system on the client's behalf, including regular backups, so there's no infrastructure for the client to set up or maintain. All financial, operational, and customer data remains the client's own — it isn't shared with or accessible to unrelated third parties.

Works With Any Country's Tax & Compliance Rules

Tax templates, invoice formats, and statutory reporting are all configurable, so the system gets set up to match whichever country's tax rules (VAT, sales tax, or otherwise) and compliance requirements actually apply to the organization, rather than being built around one country's rules by default.

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