

ERP IMPLEMENTATION PLAYBOOK · DIY
GUIDE

The ERPNext Readiness Checklist for Indian MSMEs

*Score your business in one hour, before you
spend on configuration*

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Edition 1.0 · October 2026

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The ERPNext Readiness Checklist for Indian MSMEs

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What is inside

· **Introduction**

01 Goals and Baseline

Do you know what success looks like, in numbers?

02 People and Ownership

Is there a team with authority and time?

03 Processes

Do you know how work really flows today?

04 Master Data

Is your data ready to be the foundation?

05 Systems, Security and Compliance

Can you run a business-critical system safely, and are your statutory obligations clear?

06 Your Score and What to Do Next

What your total means, and the first actions for each band.

· **Conclusion**

Introduction

Most ERP projects that struggle were in trouble before the first screen was configured: goals were vague, nobody owned the data, and the team had no time. This checklist helps you find those gaps in about an hour, while they are still cheap to fix.

How to use it

1. Sit with the person who will own the project and one person from finance and production.
2. Score each check honestly: **0** = not in place, **1** = partly, **2** = in place.
3. Add up each section, then the total. The last page tells you what your score means and what to do next.

Note: This is a readiness check, not an implementation plan. It tells you whether to start, and what to fix first.

Goals and Baseline

Do you know what success looks like, in numbers?

#	Check	0 / 1 / 2
1	We have written down the three business problems the ERP must solve.	
2	Each goal has a number and a date (for example: stock accuracy above an agreed target within three months of go-live).	
3	We have measured today's stock accuracy on a sample of items.	
4	We know today's month-end close time in working days.	
5	We know how often production or dispatch waits for material.	
6	The owner or a director has agreed these goals in writing.	

Section score: ____ / 12

If you cannot measure today, you cannot prove improvement later. Collect rough numbers now; rough is far better than none.

People and Ownership

Is there a team with authority and time?

#	Check	0 / 1 / 2
1	A director is the named sponsor and will attend a review every two weeks.	
2	One project owner has authority across departments and real time for the project.	
3	Each department (stores, production, quality, purchase, sales, accounts) has a named champion.	
4	Champions have agreed time each week, protected from daily firefighting.	
5	One or two respected supervisors will be trained first as super users.	
6	Someone is responsible for the server, backups and updates.	

Section score: ____ / 12

Projects handed to IT or a junior manager with no authority tend to stall. Ownership is the single biggest predictor in this checklist.

Processes

Do you know how work really flows today?

#	Check	0 / 1 / 2
1	We can describe, step by step, how one order moves from enquiry to dispatch.	
2	We know who records what, where, at each hand-over (registers, sheets, messages).	
3	The purchase approval limits are written down.	
4	Stores issue material only against a document, not on verbal requests.	
5	Quality checks at inward, in-process and final stages are defined.	
6	We have agreed to change habits that exist only because 'we always did it this way'.	

Section score: ____ / 12

Master Data

Is your data ready to be the foundation?

#	Check	0 / 1 / 2
1	We have one item list, even if it is messy, in a single spreadsheet.	
2	Each item has a unit of measure, and conversions (box, carton, kg) are known.	
3	Items have HSN or SAC codes.	
4	Duplicate items and suppliers have been identified.	
5	Bills of materials are written down for our main products.	
6	Customers and suppliers have valid GSTIN and PAN where applicable.	
7	Each master (items, suppliers, customers, BOMs) has a named owner.	
8	We know which old records we will not migrate.	

Section score: ____ / 16

Data is usually the most underestimated part of the project. Treat it as a workstream with an owner and a deadline.

Systems, Security and Compliance

Can you run a business-critical system safely, and are your statutory obligations clear?

#	Check	0 / 1 / 2
1	We have decided where ERPNext will run (cloud, our own server, or managed hosting).	
2	Backups will be automatic, stored off the server, and a restore will be tested.	
3	Users will have their own logins; no shared passwords.	
4	We know who will create and remove users when people join or leave.	
5	We know whether GST e-invoicing applies to us and when.	
6	We know our e-way bill and job-work obligations.	
7	Our Udyam (MSME) registration is current.	

Section score: ____ / 14

Note: Statutory limits change by notification. Confirm your obligations with your tax adviser.

Your Score and What to Do Next

What your total means, and the first actions for each band.

Total score: ____ / 66

Score	What it means	Do this next
0 to 30	Not ready yet. Starting now risks a stalled project	Name a sponsor and project owner, write your goals, and start cleaning the item list. Score again in a month
31 to 50	Ready to start with care. Gaps will slow you down	Fix the zeros first, especially ownership and master data. Plan a discovery phase before configuration
51 to 66	Well prepared. You can move to process design and data loading	Agree a phase plan with exit criteria, a pilot product line and a realistic go-live window

The five checks that matter most

If you can only fix five things, fix these:

1. A named sponsor and a project owner with authority.
2. Written goals with numbers.
3. One clean item list with units and HSN codes.
4. Champions with protected time.
5. Tested backups and individual user logins.

Where to go from here

- **Plan the full rollout:** The ERPNext Implementation Roadmap for Manufacturers covers nine phases, exit criteria, UAT scripts and a cutover runbook.
- **Setting up the server yourself?** Set Up ERPNext on Your Own VPS walks through it step by step.
- **Want help?** KhataVahi BI Solutions helps Indian MSMEs plan and implement ERPNext.

Conclusion

A good score does not guarantee success, and a low score is not a reason to give up. It tells you where to spend the first weeks. Fix the zeros first, then the ones, and score again in a month.

Khatavani BI Solutions LLP

Khatavani BI Solutions LLP is an ERP and business-intelligence consultancy based in Surat, India. The team implements ERPNext for manufacturers and distributors, from server setup and data migration to shop-floor rollout and compliance. This guide distils lessons from hands-on, on-site implementations.

Ready for the full plan? The ERPNext Implementation Roadmap for Manufacturers takes you through nine phases with exit criteria, templates and a cutover runbook. Find it at <https://explorewithjnk.com/>