



Eastop ERP System - Mechanical Engineering Industry Overview

Industry: Mechanical Engineering

Background: Mechanical engineering companies provide equipment sales, leasing, and maintenance services

Benefits after Implementation:

- System tracks product serial numbers throughout warehousing, delivery, maintenance, and repair processes
- Automatically generates maintenance invoices, eliminating repetitive renewal work

1. Mechanical Engineering Industry Background

As a mechanical engineering company, our business scope covers equipment sales, leasing, and maintenance services. We will use large-scale mechanical engineering companies as examples for illustration.

2. Industry Characteristics

Product Features in Mechanical Engineering

- Primarily large machinery with serial numbers that must be recorded on delivery notes, maintenance forms, repair orders, and work orders
- Large equipment is stored in specific warehouse locations, requiring system records of product details, receiving documents, and bin numbers
- Each major machine requires preset maintenance periods (in months) in product data

Business Operations in Mechanical Engineering

- Multiple workflows including maintenance, leasing, and repair processes with different document formats
- Maintenance & leasing: Post-sale services require integrated records of sales invoices and maintenance contracts. Serial numbers must be logged in maintenance/lease contracts with auto-generation of renewal contracts
- Repair process: Field engineers must complete service orders documenting repairs



Project Record Management

主功能表 工程記錄管理系統 x

工程記錄管理系統 Generate SC 自動產生發票

工程編號 PJ10-MAIN 啟用日期 11/10/2021 完成日期 / / 部門

客戶編號 0013 寶光電器有限公司

工程名稱 PJ10-MAIN - 銷售及保養計劃

分析碼(1) 年費 0 比率 2 金額 0

分析碼(2) 月費 0 輸入者

分析碼(3) 比率 0 批核者

備註(1) 備註(3)

備註(2) 備註(4)

工程詳情

行號	下張單日期	年費	月費	天數	總金額(A)	計算方程式	產品編號	發票前綴	起計日	補充說明	To Date	%	Org. Amount	Drg. Invoice No.	Last Invoice No.
1	1/10/2022	1	0	0	0.00		REPANTYSVC		11/10/2022	1240 器具維修費(1250)	01/01/9999		1,000.00	KM111003	

- Centralized documentation including POs, delivery notes, invoices, and accounts
- Simplified client receipt management with cross-reference capabilities
- Scheduled generation of renewal invoices by specifying year/month/day intervals
- "Auto-Generate Invoice" button creates subsequent maintenance invoices

Service Order System

主功能表 Job Schedule Maintenance 服務工單管理系統 x

服務工單管理系統 開發票 Upload SN

工單編號 S22000004 2022/01/24 部門

發票編號 營業員 公司參考 公司參考a 位置

客戶編號 HKS0004 輸入者 RAYMOND 客戶參考 客戶參考a Contact AABB

工程編號 批核者 服務性質 銷售 Phone 11223344

Job Type In-House

當家德有限公司(測試零件) 出貨倉 Main Warehouse Charged

聯絡人 Raymond Law 送貨地址

電話 24549938 傳真 24547298

領回日期 2022/01/24 11:51 工作日期 2022/02/24

估計工作時間 2022/01/24 11:51 工作時間

送貨詳情 工作地點 On-Site 工程師 ANDY

Level 2 預計時間 工作狀態 Complete 工作完成 / /

備註及其他條款 箱嘍

REMARK11111 紙皮箱嘍

SN	保養產品編號	產品編號	終止日期	Service Clas	Symptom	Reason	Action
		A008454	2022/01/25		damage	unknow	checking

- Tracks field engineers' work schedules, completion times, and job statuses
- Records equipment serial numbers
- Documents fault diagnoses for future reference

