Senior ERPNext Functional Consultant - Job Description

Position Overview

We are seeking an experienced Senior ERPNext Functional Consultant to join our dynamic consulting team. This role is ideal for a seasoned ERP professional who specializes in ERPNext implementations for mid-sized to large retail organizations.

The successful candidate will play a crucial role in pre-sales activities including client demonstrations, solution presentations, and proposal development, while leading end-to-end ERPNext implementation projects from requirements gathering to go-live.

The position involves working closely with clients to transform their business processes and drive operational excellence, while also supporting our Product Marketing team with technical expertise and insights to enhance our go-to-market capabilities.

Industry Knowledge

- **Deep understanding of retail industry business processes** and operational workflows
- **Comprehensive knowledge of retail financial operations** including inventory valuation, cost of goods sold, and margin analysis
- **Experience with retail-specific accounting challenges** such as promotional accounting, markdown accounting, and seasonal adjustments
- **Understanding of supply chain management and inventory optimization** in retail environments
- **Knowledge of retail performance metrics** including same-store sales, inventory turnover, and gross margin analysis
- **Familiarity with retail regulatory compliance requirements** and industry-specific reporting standards, while also supporting our Product Marketing team with technical expertise and insights.

Key Responsibilities

Pre-Sales & Business Development

- Participate in pre-sales activities including solution demonstrations and proposal development
- Conduct initial client assessments to understand business requirements and technical landscape
- Collaborate with sales teams to develop compelling proposals and project estimates
- Lead discovery workshops to identify client needs and implementation scope

Requirements Analysis & Solution Design

- Facilitate detailed requirements gathering sessions with client stakeholders
- Analyze current business processes and identify opportunities for improvement
- Design comprehensive ERPNext solutions that align with client business objectives
- Create detailed functional specifications and system architecture documentation
- Develop implementation roadmaps and project timelines

ERPNext Configuration & Customization

- Configure ERPNext modules including Accounting, Sales, Purchase, Inventory, and Manufacturing
- Create and customize DocTypes to meet specific client requirements
- Develop server-side and client-side scripts for business process automation
- Design and implement custom reports, dashboards, charts, and number cards
- Configure workflows, permissions, and user roles based on organizational structure
- Set up integrations with third-party systems and applications

Financial & Accounting Configuration
- Design and implement comprehensive Chart of Accounts structures
- Configure complex accounting workflows including multi-currency transactions
- Set up cost center and profit center accounting for retail operations
- Implement financial reporting frameworks and statutory compliance requirements
- Configure automated journal entries and accounting integrations
- Design budgeting and financial planning modules
- Set up inter-company accounting and consolidation processes
- Configure tax structures, GST/VAT compliance, and regulatory reporting

Implementation & Project Management
- Lead full-lifecycle ERPNext implementation projects from initiation to go-live
- Coordinate with development teams for custom feature development
- Manage project timelines, deliverables, and client communications
- Conduct regular project status meetings and progress reviews
- Ensure adherence to project scope, budget, and quality standards

Product Marketing Support
- Assist and guide the Product Marketing team in developing comprehensive product documentation
- Provide technical expertise for creating certification question banks and examination materials
- Support the development of educational product videos and tutorial content
- Collaborate with marketing team on case studies and implementation success stories
- Contribute technical insights for competitive analysis and positioning materials
- Review and validate marketing collateral for technical accuracy
- Provide subject matter expertise for thought leadership content development
- Support the creation of training materials and certification curricula

Testing & Quality Assurance
- Oversee system integration testing with focus on financial data integrity
- Coordinate user acceptance testing activities
- Ensure compliance with accounting standards and regulatory requirements

Training & Knowledge Transfer
- Provide functional training to client teams on ERPNext modules
- Create essential documentation for system processes
- Support user adoption through targeted training sessions

Post-Go-Live Support
- Provide stabilization support during initial go-live period
- Address critical issues and system optimization needs
- Support periodic system health checks and performance reviews

Required Qualifications

Education & Experience
- Bachelor's degree in Accounting, Finance, Business Administration, or related field
- 10+ years of total ERP implementation experience
- Minimum 3 years of hands-on ERPNext implementation experience
- Proven track record of successful ERP project delivery

Technical Skills
- Expert-level knowledge of ERPNext module configuration (Accounting, Sales, Purchase, Inventory, Manufacturing)

- Deep understanding of DocTypes
- Strong experience with server-side and client-side scripting in ERPNext
- Expertise in creating custom reports, dashboards, charts, and number cards

Financial & Accounting Expertise
- **Advanced knowledge of accounting principles** including GAAP, IFRS, and local accounting standards
- **Strong understanding of financial processes** including Accounts Payable, Accounts Receivable, General Ledger, and Financial Reporting
- **Experience with complex accounting scenarios** such as multi-currency transactions, intercompany accounting, and consolidation
- **Knowledge of cost accounting principles** including standard costing, variance analysis, and activity-based costing
- **Understanding of financial controls and audit requirements** for retail organizations
- **Experience with statutory reporting and compliance** requirements in various jurisdictions
- **Proficiency in budgeting and financial planning** processes and systems
- **Knowledge of taxation structures** including GST/VAT, sales tax, and other regulatory requirements

Project Management & Client Relations
- Strong analytical and problem-solving abilities
- Proven client management and relationship building skills
- Ability to work effectively in cross-functional teams
- Strong project management capabilities
- Adaptability to changing client requirements and project scope
- Leadership skills for mentoring junior team members

Communication & Collaboration Skills
- **Excellent written and verbal communication skills** for client interaction and documentation
- **Ability to explain complex technical concepts** to non-technical stakeholders
- **Strong project management** capabilities
- **Strong presentation skills** for client meetings and training sessions
- **Collaborative approach** to working with cross-functional teams including marketing
- **Technical writing abilities** for supporting documentation and content development

Preferred Qualifications
- **Bachelor's degree in Accounting, Finance, Business Administration, or a related field.**
- **Advanced ERPNext certifications**
- **Knowledge of financial consolidation and reporting** across multiple entities
- **Experience with other ERP systems** (SAP FI/CO, Oracle Financials, Microsoft Dynamics)
- **Understanding of business intelligence and financial analytics** tools
- **Experience with cloud-based ERP implementations** and data migration
- **PMP or equivalent project management certification**
- **Experience in pre-sales and business development activities**
- **Previous experience supporting marketing teams** or product development initiatives

Travel Requirements
- Moderate travel required (approximately 25-40% of time)
- Willingness to travel to client sites for implementations and support

What We Offer
- Competitive salary and performance-based bonuses
- Comprehensive benefits package including health, dental, and vision insurance
- Professional development opportunities and training programs

- Flexible work arrangements and remote work options
- Opportunity to work with cutting-edge technology and innovative clients
- Career advancement opportunities within a growing organization
- Collaborative and supportive team environment
- Opportunity to shape product direction through client feedback and market insights
- Professional growth in both consulting and product marketing domains

Reporting Structure

This position reports to the Practice Manager and works closely with the delivery team, including developers, technical consultants, and project managers. The role involves regular interaction with C-level executives and senior management at client organizations, as well as close collaboration with the Product Marketing team for content development and marketing initiatives.

Application Process

Interested candidates should submit their resume along with a cover letter highlighting their ERPNext experience and relevant project achievements. Please include specific examples of successful ERPNext implementations and any relevant certifications.