CLOUD ERP FOR UK FABRICATION

One platform for the whole fabrication business.

Twelve connected modules covering enquiries and quotations, purchasing and steel stock, fabrication projects, site installation, accounting, payroll and people — running securely in the cloud, on one shared set of data.

- Real-time dashboards
- Rule-based insights
- Role-based access
- UK hosted

Zentra ERP SUITE

ZENTRASUITE.COM

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A module-by-module walkthrough of Zentra ERP Suite for fabrication businesses, followed by how it is implemented, secured and supported.

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INTRODUCTION

Software that follows the job from enquiry to installation

Fabrication businesses rarely lose money on the steel. They lose it in the gaps — the enquiry that never got quoted, the section bought twice because nobody trusted the rack, the drawing revision that reached the shop floor late, the site hours that arrived after payroll had closed.

Zentra ERP Suite was built to close those gaps. It is a single cloud platform where estimating, buying, the workshop, site teams and the office all work on the same records: enquiries, quotations, purchase orders, steel and consumable stock, fabrication projects, site allocation, accounts, payroll, people, messaging and drawings. Nothing is re-keyed, nothing is exported to be reconciled later.

Every screen is designed around a decision rather than a form. Dashboards open with the numbers a manager would ask for first, rule-based insights flag what needs attention today, and role-based access keeps each team focused on their own work while directors keep a complete view.

This guide walks through the platform module by module in a fabrication context, then explains how a rollout works in practice — from data migration and training to support once you are live.

The Zentra Suite team
United Kingdom

12

Connected modules, licensed together or in stages as you grow.

One

Shared database, so a change in one module is visible everywhere instantly.

DESIGNED FOR

Structural steel fabricators, sheet metal and plate shops, architectural metalwork, mezzanine, racking and platform installers, engineering workshops, and multi-site fabrication groups working across the UK.

THE PROBLEM

What disconnected systems quietly cost you

Separate tools rarely announce a problem. The cost shows up as delay, duplication and doubt — and it grows with every new customer, site and employee.

01

The same data, entered three times

A take-off is priced in a spreadsheet, retyped into the order book, then retyped again into the accounts package. Each copy is a chance to quote the wrong tonnage.

02

Month-end as an investigation

Reporting becomes archaeology: exporting, matching and chasing before anyone can say what the month actually looked like.

03

Stock nobody trusts

When issues, offcuts and workshop requisitions live outside the system, buyers order sections already in the rack and estimators promise material the yard cannot supply.

04

Decisions made on last week

By the time a report is compiled, the situation has moved. Managers act on the version of the business they can see, not the one they have.

05

Knowledge in personal inboxes

Approved drawings, revision histories, mill certificates and RAMS sit in individual mailboxes and local drives. When one person is off site, the job waits.

06

Growth that costs more than it earns

Every extra contract, workshop or installation crew adds administration rather than absorbing it, because the process depends on people remembering the workaround.

> The alternative is not more software. It is fewer systems, sharing one record of the truth — which is precisely what the following pages describe.

THE PLATFORM

One platform, twelve connected modules

Start with the modules you need today and switch on the rest as you grow. Because they share one database, each addition makes the others more useful rather than more work.

01

Sales

Customers, quotations, orders, delivery notes, invoices, revenue.

02

Purchase

Suppliers, requisitions, purchase orders, payables, spend trends.

03

Inventory

Stock, warehouses, movements, reorder alerts, assets, requisitions.

04

Accounting

Ledgers, cash flow, balance sheet, P&L, VAT-ready reporting.

05

Payroll

Pay runs, allowances, deductions, loans and advances, payslips.

06

HRMS

Employees, departments, attendance, leave, requests, events.

07

Recruitment

Vacancies, public job links, candidates, interviews, offers.

08

Project Management

Enquiries, progress, approvals, production stages, invoicing.

09

Job Allocation

Live site map, resource allocation, schedules, portfolio value.

10

Chat & Communication

Channels per job, direct messages, linked ERP records, files.

11

Document Storage

Company drive, folders, sharing, versions, ERP attachments.

12

Email Management

Shared mailboxes, templates, threads attached to records.

WHY ZENTRA

Four things that change how the day runs

INSIGHTS

Alerts on every screen

Rule-based insight panels read your live thresholds and trends, then say what deserves attention — low-stock pressure, pending approvals, unpaid runs, collection risk — with a suggested action.

ANALYTICS

Live KPIs, not monthly packs

Every module opens on a dashboard with period and branch filters, trend charts and drill-down tables, so the answer to "how are we doing" is one click rather than one week.

INTEGRATED

One record, end to end

An enquiry becomes a quotation, an order, a job, a delivery note and an invoice without leaving the platform — and the ledger, stock and payroll update themselves as it moves.

CLOUD

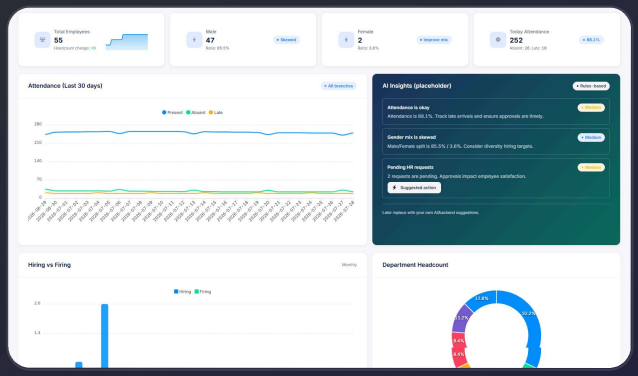
Any device, controlled access

Office, factory floor or site visit — the same platform in a browser, with role-based permissions deciding exactly what each person can see, edit and approve.

IN PRACTICE

Managers stop assembling numbers and start acting on them.

Dashboards are built around the questions that get asked in meetings, so the same screen serves the daily stand-up, the weekly review and the board pack.

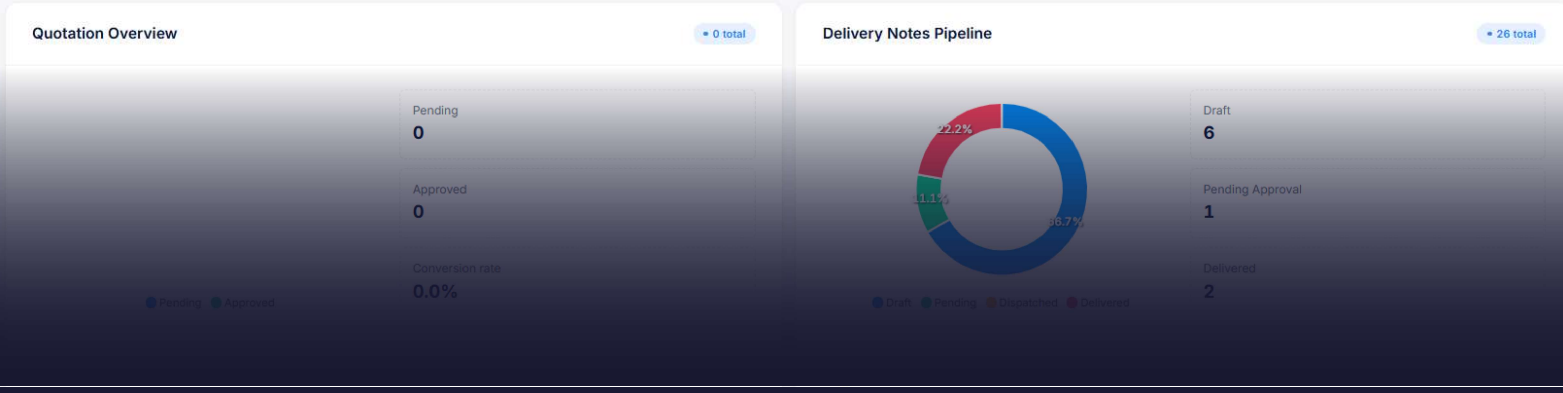


PART TWO

The modules, one by one

Each of the next twelve pages covers one module: what it manages, what the dashboard shows, and what it removes from the working week.

12	1	0
Modules	Shared database	Re-keying between them



From first enquiry to cash collected

The Sales module holds the whole revenue chain in one place — customers, enquiries, quotations for fabricated and supplied items, orders, delivery notes and invoices — with conversion and collection tracked as the work moves, not reconstructed at month-end.

Customer records

Contacts, sites, terms, credit limits and full transaction history on one screen.

Quotations

Build, revise and send quotes; track pending, approved and conversion rate.

Sales orders

Approved quotes become orders with one action, reserving stock as they go.

Delivery notes

A live pipeline of draft, pending approval, dispatched and delivered consignments.

Invoicing & receivables

Invoice from the order, then watch outstanding balance, overdue and collection risk.

Revenue analytics

Revenue and order trends, average ticket, gross margin and top customers by value.

WHAT IT REMOVES Re-typing quotes into orders, chasing which invoice was raised, and building a revenue report by hand.



Control what you commit to spend

Purchasing runs on the same records as stock and accounts. Workshop requisitions become orders on your steel stockholders, fixings suppliers and subcontractors; orders become receipts, receipts become payables — with supplier performance and spend visible throughout.

Supplier management

Vendor records, contacts, agreed terms and complete purchase history.

Requisition to order

Internal requests are approved and raised as purchase orders against a budget.

Goods receipt

Receive full or partial deliveries; stock and valuation update on confirmation.

Purchase invoices

Match invoices to orders and receipts, then post straight to the ledger.

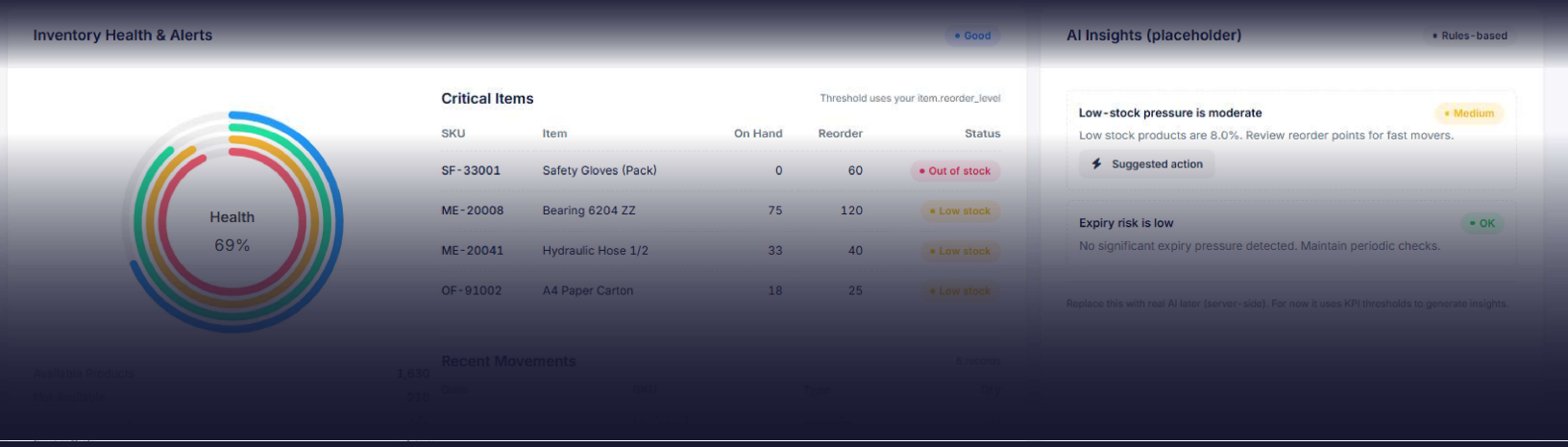
Payables summary

What is owed, to whom and when — with ageing and upcoming commitments.

Spend trends

Purchasing by period, category and supplier, so negotiation starts from evidence.

WHAT IT REMOVES Duplicate ordering, invoices approved without a matching receipt, and month-end surprises in payables.



Know exactly what you hold, and what it is worth

Inventory keeps stock, value and movement in step across the yard, the racking and the workshop stores — sections, plate, fixings and consumables — with reorder alerts and asset tracking so shortages are found before a site crew finds them.

Stock & valuation

Quantity on hand, unit cost and total value by SKU, category and warehouse.

Low-stock alerts

Reorder levels per item drive critical-item and out-of-stock warnings automatically.

Material movement

Every in, out, transfer and adjustment logged with date, quantity and reason.

Material requests

Site and workshop requisitions raised, approved and issued against live stock.

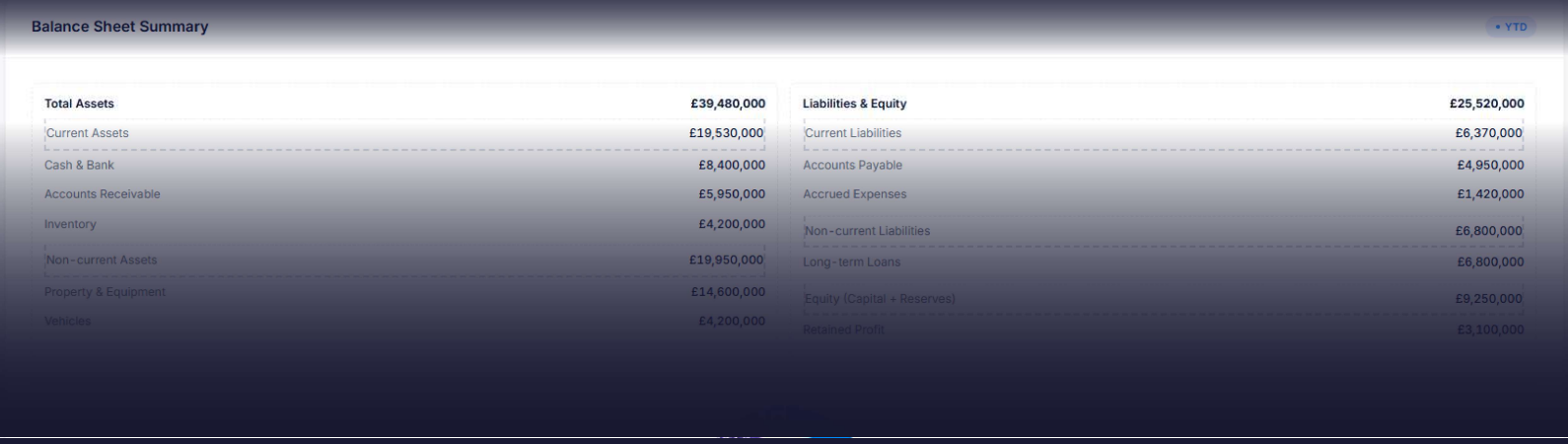
Assets register

Tools, plant, IT and equipment with available, assigned and category breakdowns.

Inventory health

A single health score covering availability, expiry risk and slow-moving value.

WHAT IT REMOVES Stock counts that disagree with the books, emergency purchases, and materials issued with no record of where they went.



The financial position, always current

Because sales, purchasing, stock and payroll post directly to the ledger, the accounts are a live view of the business rather than a monthly rebuild. Revenue, expense, profit and cash flow are on one screen.

Revenue & expense

Year-to-date totals with period comparison and margin tracked against target.

Cash flow & runway

Net movement, cash at bank and cover in months, updated as payments clear.

Balance sheet summary

Current and non-current assets, liabilities and equity, reconciled continuously.

Chart of accounts

Your own account structure, with top accounts ranked by movement and balance.

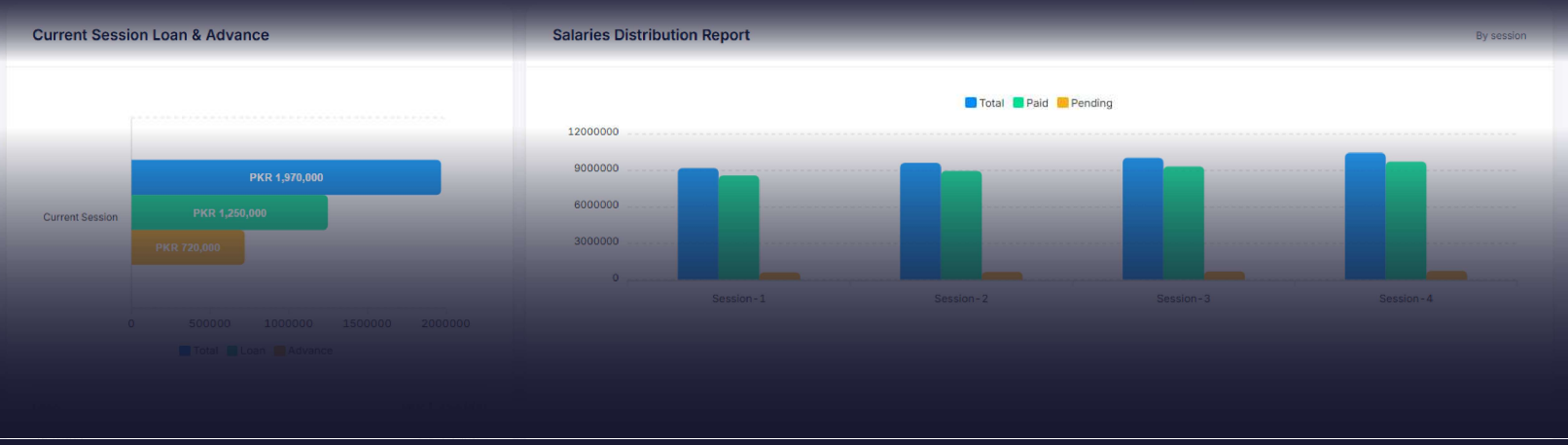
Receivables & payables

Both sides of the ledger fed straight from sales and purchase documents.

Reports & export

Profit and loss, trial balance and account statements, exportable for your accountant.

WHAT IT REMOVES Journals typed twice, a management pack that arrives three weeks late, and disagreement about what the numbers are.



Pay runs that close without a scramble

Payroll draws on the attendance, overtime and contract data already held in HRMS. Each session shows what is payable, what is paid, what is deducted and every exception still blocking sign-off.

Pay sessions

Weekly, fortnightly or monthly runs with processed, pending and paid counts.

Allowances & adjustments

Bonuses, arrears, overtime, stipends and final settlements broken out by month.

Deductions

Statutory and company deductions applied by rule, with the effective rate shown.

Loans & advances

Balances, recovery schedules and outstanding amounts per employee.

Exception handling

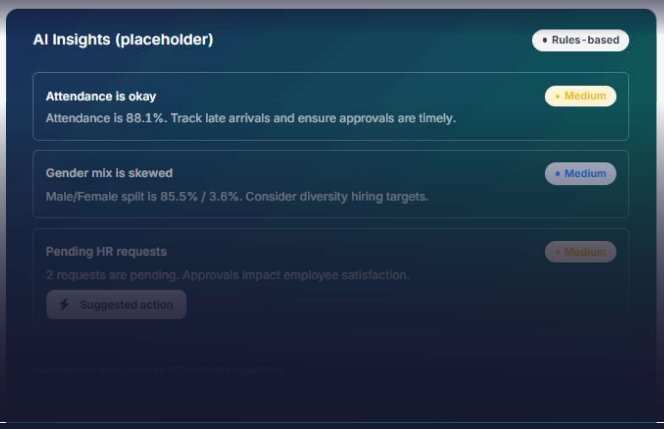
Missing bank details, overtime mismatches and unapplied allowances flagged before payment.

Cost by department

Gross, deductions and net by team, posted to the ledger automatically.

WHAT IT REMOVES Spreadsheet pay runs, timesheets chased by email, and corrections discovered after payday.





Your workforce, on the record

HRMS is the single employee record the rest of the platform relies on — headcount, departments, attendance and requests — so payroll, projects and job allocation all work from the same team data.

Employee records

Contracts, roles, documents, qualifications and start dates in one profile.

Departments & branches

Headcount distribution across teams and sites, with reporting lines.

Attendance

Present, absent and late tracked daily, with a 30-day trend per branch.

Requests & approvals

Leave, loan, overtime and shift changes routed with status and priority.

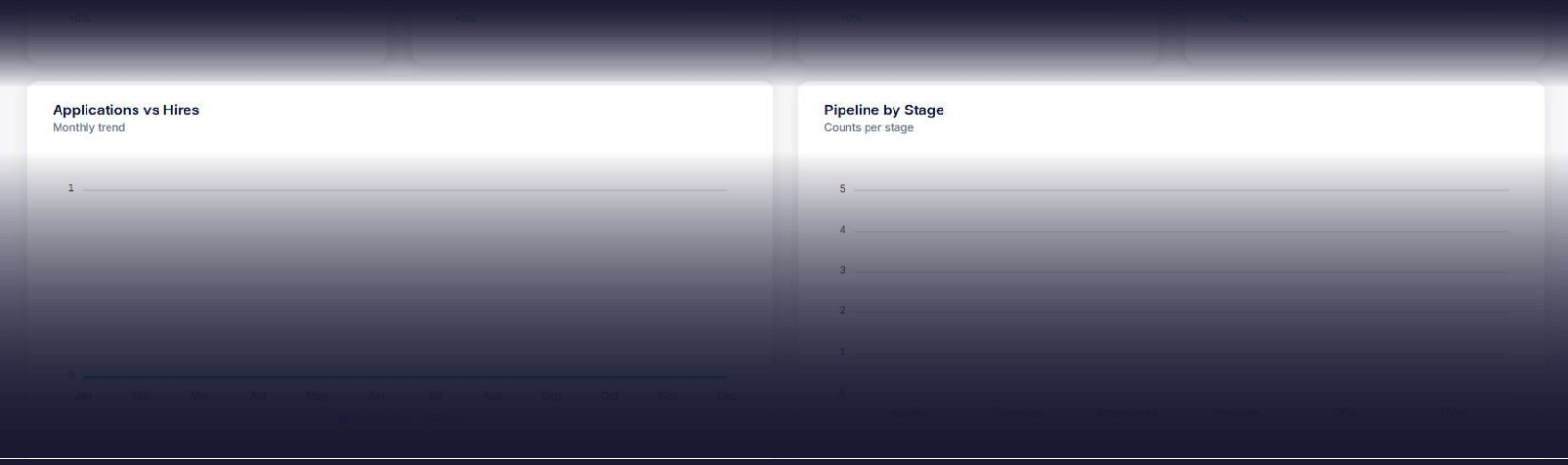
Events calendar

Birthdays, anniversaries, probation reviews and contract end dates ahead of time.

Workforce analytics

Joiners against leavers, attendance rate and headcount change over the year.

WHAT IT REMOVES Attendance sheets on paper, leave approved over the phone, and contract dates nobody noticed.



Hire without losing the thread

Recruitment carries a vacancy from approval to first day: publish the role, collect applications through a public link, move candidates through stages, and hand the accepted offer straight to HRMS.

Open positions

Vacancies by department, location and job type, with approval status.

Public job links

A shareable application page per role; submissions arrive as candidate records.

Candidate pipeline

Applied, screening, assessment, interview, offer and hired — counts per stage.

Interview scheduling

Panels, dates and outcomes recorded against the candidate, not in an inbox.

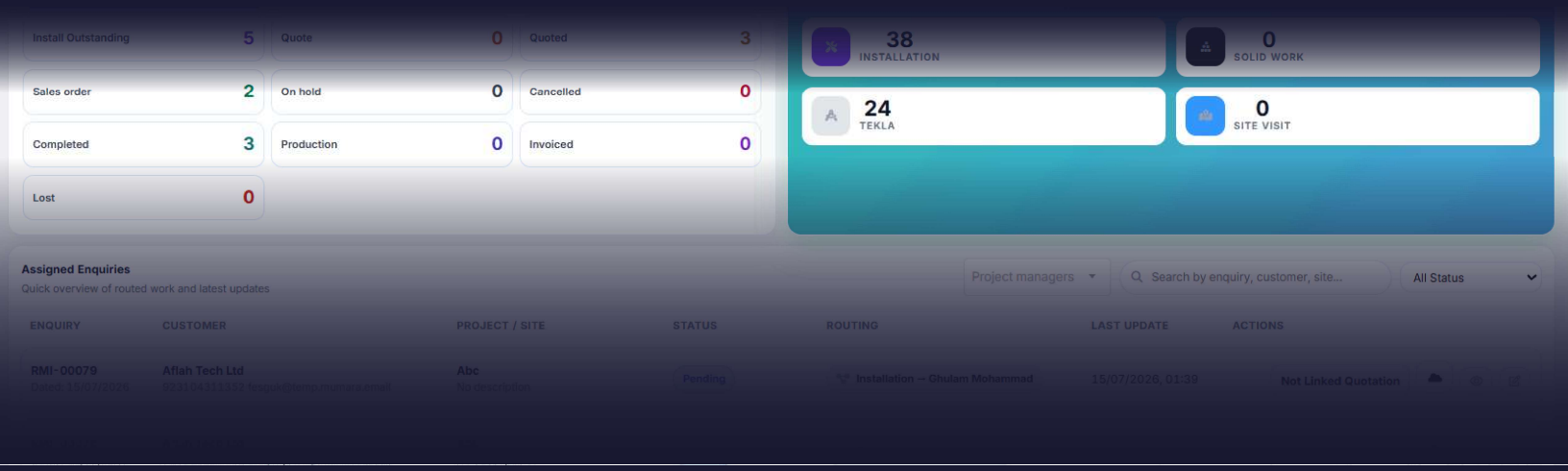
Source performance

Which channels actually produce hires, and at what acceptance rate.

Time to hire

Days spent at each stage, by department, so bottlenecks are visible.

WHAT IT REMOVES CVs forwarded between mailboxes, candidates who go quiet unnoticed, and re-entering a new starter's details.



Every enquiry accounted for, every stage owned

Project managers see the work routed to them and nothing else: assigned enquiries, whether each is in detailing, production, installation or awaiting sign-off, which need a quote approved, and which are ready to invoice.

Enquiry summary

Assigned, pending, quoted, on hold, in production, completed, invoiced and lost.

Routing & ownership

Each enquiry routed to a named manager and work type, with the last update logged.

Quote approvals

See instantly which enquiries have a linked quotation and which are still waiting.

Service activity

Current distribution across installation, site visits, detailing and workshop work.

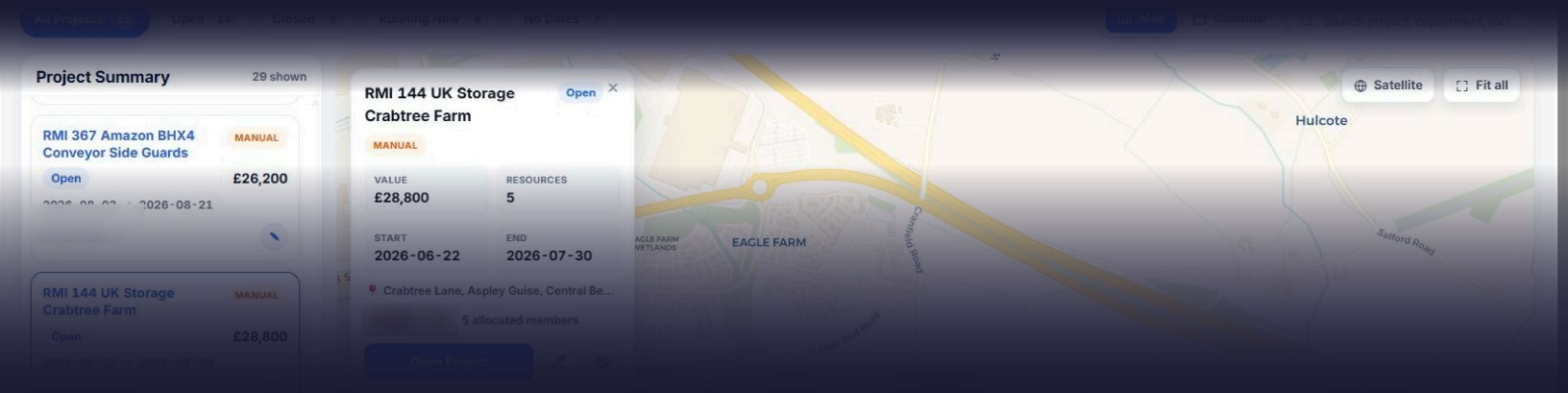
Progress updates

Update status, attach documents and close approvals from the same list view.

Handover to invoicing

Completed work flows to sales for invoicing with no separate handover note.

WHAT IT REMOVES The weekly status meeting spent establishing status, and jobs finished but never invoiced.



Who is on site, where, and for how long

Allocation puts every live contract on a map and a calendar. Each job carries its value, dates, site location and allocated installation crew, so promises about attendance are made against the fitters and dates genuinely available.



Live project map

Pinned and geofenced sites, with satellite view and fit-to-portfolio.

Team allocation

Assign members to a job and see who is committed where before promising dates.

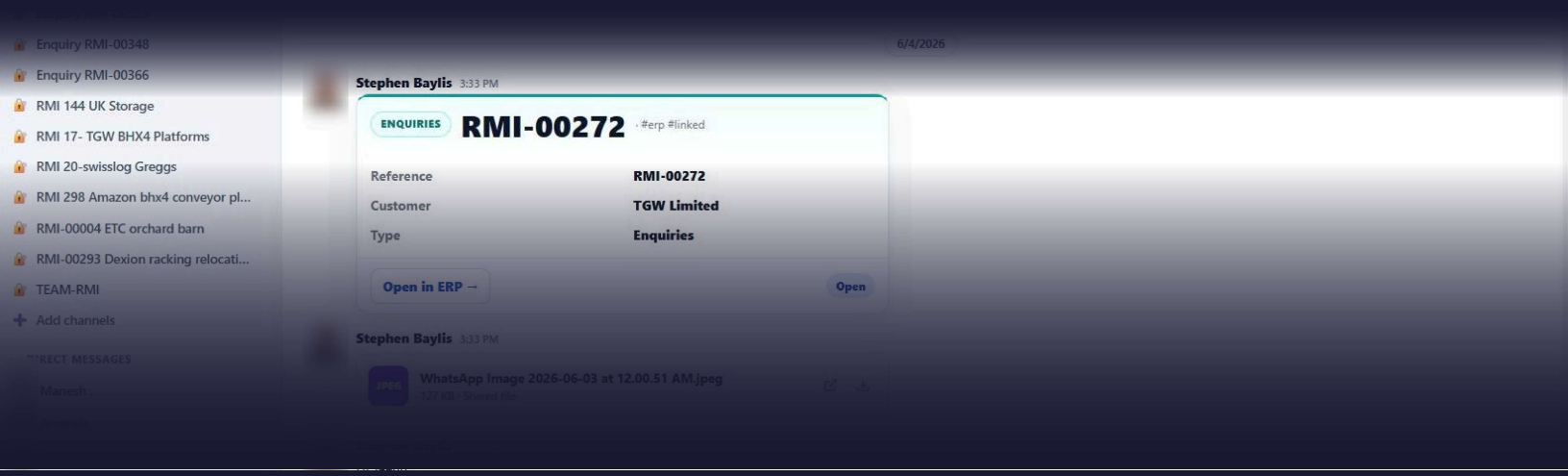
Timeline & calendar

Month, week and agenda views with start and end dates per project, and undated work separated.

Portfolio value

The financial weight of open work, filterable by status, department and location.

WHAT IT REMOVES The whiteboard schedule, double-booked engineers, and travel planned without knowing what else is nearby.



Conversation attached to the job it is about

Internal messaging sits inside the ERP, so a channel can belong to an enquiry, a project or a team. Records can be shared into a conversation as a live card that opens the original in one click.

Channels per job

A private channel per enquiry, project or team, so history stays with the work.

Linked ERP records

Share an enquiry, quote or invoice as a card with an "open in ERP" action.

Direct messages

One-to-one and small-group conversations with presence and read state.

Files & pinned items

Every attachment collected per channel, with decisions pinned to the top.

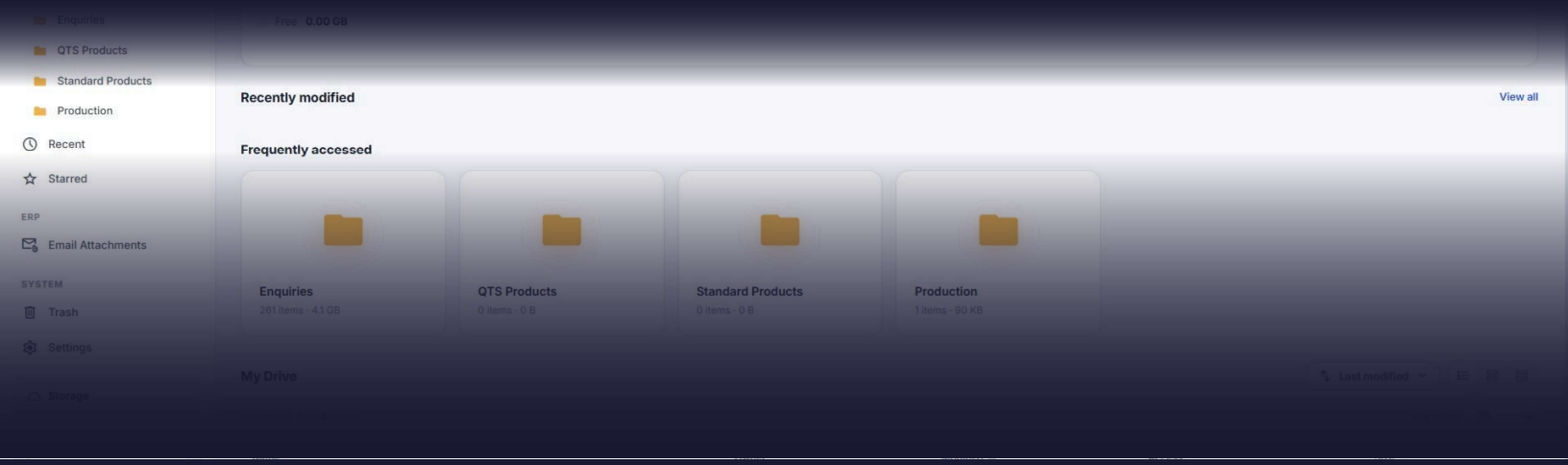
Search across history

Jump to a channel, file or message without leaving the platform.

Rich formatting

Lists, quotes, code and mentions for instructions that need to be precise.

WHAT IT REMOVES Job decisions buried in personal messaging apps, and context lost when someone leaves the company.



A company drive that knows your records

General arrangement and fabrication drawings, mill certificates, weld procedures, RAMS and site photographs live in a familiar drive interface — but inside the ERP, where folders mirror your enquiries and email attachments are filed automatically.

Personal & shared drives

My Drive for individual work, shared folders for the team, with clear ownership.

Folders that match the ERP

Structure by enquiry, product line or production stage so nothing is hunted for.

Email attachments, filed

Incoming attachments land in the drive against the record they belong to.

Access control

Private, shared or company-wide per folder, following the same ERP roles.

Recent, starred, trash

Familiar navigation, plus search across file names and folders.

Storage management

Usage per drive and per folder, so growth is planned rather than discovered.

WHAT IT REMOVES Drawings on a local machine, three versions of the same certificate, and a separate file-sharing subscription.

Customer email, kept with the customer

Shared mailboxes such as sales@ and accounts@ are handled inside the ERP. Threads are attached to the enquiry, customer or invoice they concern, and documents are sent from templates that already carry your branding.

STEP 01

Arrives

Mail reaches a shared company mailbox rather than one person's inbox.

STEP 02

Matched

The thread is linked to a customer, enquiry, order or invoice.

STEP 03

Assigned

An owner takes it, with status visible to everyone else on the team.

STEP 04

Filed

Reply and attachments are stored against the record and in the drive.

Shared mailboxes

Sales, accounts and support inboxes worked by a team, with clear ownership per thread.

Send from the record

Email a quotation, order confirmation, delivery note or invoice directly from it.

Branded templates

Reusable layouts for common correspondence, so wording and format stay consistent.

Full audit trail

Who sent what, when, and with which attachment — visible on the customer record.

Attachment capture

Incoming drawings and certificates filed into the drive without a manual save.

Handover-proof history

Cover for absence and staff changes: the conversation belongs to the company.

WHAT IT REMOVES

Forwarded chains, two people answering the same customer, and commitments no one else can see.

INTEGRATION

How one enquiry moves through the platform

Nothing in the chain below is a separate system or an import. Each step is the same record advancing, and the modules underneath update as it does.

01 **Enquiry** › 02 **Quotation** › 03 **Sales order** › 04 **Job allocated** › 05 **Delivery note** › 06 **Invoice**

WHAT UPDATES AUTOMATICALLY ALONG THE WAY

Inventory

Stock is reserved at order, issued at delivery and revalued on receipt of purchases. Reorder alerts recalculate immediately.

Accounting

Invoices, purchase bills and payroll post to the ledger, so receivables, payables and cash flow are never a separate exercise.

People & payroll

Allocated hours and overtime feed attendance and the next pay run, with cost attributed to the job and department.

Documents & email

Every drawing, approval and reply is filed against the record, giving a complete audit trail for the job.

Existing systems can stay in place where they need to. Data can be imported at go-live, exported on demand, and exchanged with accountants and third-party tools through structured file exports — discussed as part of your implementation plan.

SECURITY

Security and data protection

Your ERP holds customer, financial and employee data. Zentra ERP Suite is built so access is deliberate, activity is traceable, and your obligations under UK data protection law are straightforward to meet.

Role-based access

Permissions are granted by role and branch, down to individual modules and actions. Staff see the records their job requires and no more; directors retain the full view.

Encrypted in transit

All traffic between browser and platform is served over TLS, with modern password hashing and session controls on every account.

Audit trail

Approvals, edits, sends and status changes are recorded against the record and the user, which matters as much for internal control as for compliance.

Backups & recovery

Regular automated backups with a documented restore process, so an accident or hardware failure does not become a lost week.

UK GDPR alignment

Data-processing terms, defined retention, subject-access support and deletion on request. You remain the data controller; Zentra Suite acts as your processor.

Your data stays yours

Full export of your records on request, at any point in the relationship — including if you decide to leave.

Procurement or IT reviewing the platform? Ask us for the current data-processing agreement, hosting details and security summary before you commit.

info@zentrasuite.com

IMPLEMENTATION

How a rollout actually works

A staged implementation led by our own team, sequenced so your team is never asked to learn everything at once. Timescales depend on the number of modules, branches and the state of your existing data.

STAGE 01
Week 1

Discovery & process mapping

We walk your current workflow end to end — documents, approvals, numbering, branches and reporting — and agree exactly which modules go live first.

STAGE 02
Weeks 2–3

Configuration

Company structure, branches, chart of accounts, tax settings, document templates, approval rules and user roles are configured to match how you work.

STAGE 03
Weeks 3–4

Data migration

Customers, suppliers, item masters, opening balances, employees and open orders are imported, then reconciled against your existing records with you.

STAGE 04
Week 5

Training by role

Short sessions for each team — sales, purchasing, stores, finance, HR, project managers — covering only the screens they use, with a written quick-reference.

STAGE 05
Week 6

Parallel run & go-live

A period of running both systems on real transactions, a sign-off checklist, then a planned cut-over date with support on hand.

STAGE 06
Ongoing

Support & optimisation

A named contact, agreed response times, and periodic reviews to switch on further modules or refine reports as your processes settle.

TYPICAL

Six weeks from kick-off to go-live for a single-branch rollout of core modules. Larger or multi-site programmes are phased module by module.

CUSTOMER STORY

What the first quarter usually looks like

A composite of the rollouts we see most often: a fabricator of around fifty people — one workshop, two installation crews, several spreadsheets and an accounts package nobody else can open.

BEFORE

Every quotation rebuilt from an old take-off. Stock confirmed by walking the yard. Two people keeping the installation schedule on a whiteboard. Payroll reconstructed from paper site timesheets. Management figures three weeks after month-end.

AFTER

Quotes raised from the item master and converted to orders in a click. Yard stock and reorder alerts on one screen. Contracts allocated on a map with the crew attached. Payroll drawn from recorded attendance. Revenue, margin and cash visible to directors every morning.

WHERE THE TIME GOES BACK

Administration

Documents are generated from records rather than retyped, and approvals move without chasing.

Month-end

Closing becomes a review of numbers that are already there, instead of an assembly job.

Management time

Meetings start from a shared dashboard, so discussion is about decisions, not data.

> "The difference is not that we work faster. It is that nobody has to ask where something is before they can start."
>
> Operations director · composite of implementation feedback

ADD YOUR OWN
Client name and sector

ADD YOUR OWN
Measured result, e.g. hours saved per week

ADD YOUR OWN
Named quote with permission to publish

ROADMAP

Where the platform is going

Zentra ERP Suite is developed continuously, and customer requests shape the order of work. Priorities below are indicative rather than contractual.

NOW

Live today

Twelve modules in production · Rule-based insight panels on every dashboard · Branch and period filtering · Role-based permissions · Public job links · Live job map · Company drive · Shared mailboxes

NEXT

In development

Model-driven insights replacing rule thresholds · Custom report builder · Approval workflow designer · Deeper production and work-order tracking · Scheduled report delivery by email

LATER

Planned

Mobile companion app for site teams · Customer and supplier self-service portals · Open API for third-party integration · Barcode and QR stock handling · Multi-currency consolidation

REQUESTS WELCOME

Customers on a support agreement can submit development requests directly.

Where a requirement is specific to your operation, we also build bespoke modules and reports on top of the platform, so an unusual process does not force you back to spreadsheets.

QUESTIONS

Frequently asked

Do we have to take all twelve modules?

No. Most fabricators start where the pain is — enquiries and quotations, purchasing, stock and accounting — then add projects, job allocation and people once those are settled.

What happens to our existing data?

Customers, suppliers, items, employees, opening balances and open orders are migrated during implementation and reconciled with you before go-live.

How long does implementation take?

Typically around six weeks for a single-site rollout of core modules. Multi-site or heavily customised programmes are phased.

Can we restrict what staff see?

Permissions are set per role, module and action, and can be scoped to a branch — so pay, margin and supplier pricing stay with the people who need them.

How is support provided?

A named contact with agreed response times, plus in-app help on each screen and refresher training for new starters.

Can it handle more than one branch?

Yes. Branches and warehouses are first-class: every dashboard filters by branch, and consolidated figures are available to head office.

Does it work with our accountant?

Yes. Reports and ledgers export in standard formats, and your accountant can be given a read-only role rather than a copy of the file.

Do we need new hardware?

No. Zentra runs in the browser on existing laptops, desktops and tablets. There is no server to buy or maintain.

What if we need something bespoke?

We develop the platform in house, so extra fields, document layouts, certification records and whole modules can be built around your fabrication process.

Can we see it with our own data first?

Yes. We can load a sample of your sections, customers and open enquiries into a demonstration environment so the walkthrough looks like your own contracts.

> A question that is not answered here is usually the most useful one. Send it to us and we will answer it against your actual process rather than in general terms.

Zentra ERP SUITE

See it running on your own numbers

A guided demonstration takes about forty-five minutes. Bring a live enquiry, a steel supplier invoice and last month's yard stock position, and we will follow them through the platform end to end — quotation, order, workshop, site and invoice.

01

Discovery call

Thirty minutes on your current systems and priorities.

02

Tailored demonstration

The modules you need, populated with a sample of your data.

03

Proposal & plan

Scope, licensing and an implementation timeline in writing.

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