Enterprise Resource Planning (ERP)

Introduction to ERPNext

ERPNext for nonprofits (NPOs) is tailored to meet their needs. It includes features that could help an NPO manage their finances, manage grants and monitor program outcomes.It provides the necessary tools to ensure long-term growth and success, by providing transparency, control and scalability.

Note: Today, NPOs also face some of the problems that large enterprises do. One of them is planning and managing their resources. They face similar complexities but have limited resources to deal with them.

Features of the tool

- API
- Accounting
- Activity dashboard
- Billing & invoicing
- Bills of material
- CRM
- Customer database
- Customizable reports
- Distribution management
- Document management
- Enterprise asset management
- Financial analysis
- Financial management
- HR management
- Integrated business operations
- Inventory management
- Inventory tracking
- Multi-Location
- Order Management
- Payroll Management
- Project Management
- Purchase Order Management
- Real Time Data
- Reporting/Analytics
- Supply Chain Management
- Task Management
- Third Party Integrations
- Time & Expense Tracking
- Workflow Management

Benefits of Nonprofits

- Affordability: ERPNext is a free and open source software that can be downloaded and installed for free.
- Customisation: It is straightforward to incorporate extra fields or functionalities into the existing system.
- Resourcefulness: A single system and database that is shared across multiple users, allowing them to simultaneously record and access data.

Why Nonprofits can use ERPNext

- It's an open source tool.
- Ease of use.
- Simple Interface.
- Customizable.

Supported Database

ERPNext allows you to easily connect and explore data stored in multiple databases and data warehouses.

The following databases are officially supported by ERPNext Open Source:

- MariaDB
- PostgreSQL
- MySQL
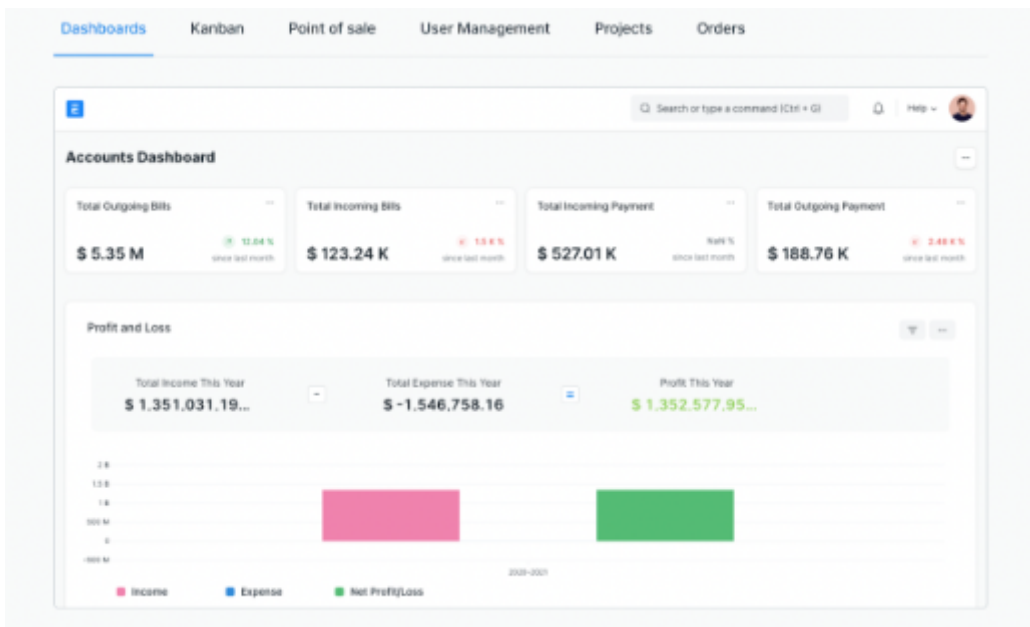- Microsoft SQL Server
- MongoDB

Integration

ERPNext has a host of built-in integrations that helps NPOs to take-off faster.

- Paypal
- Dropbox
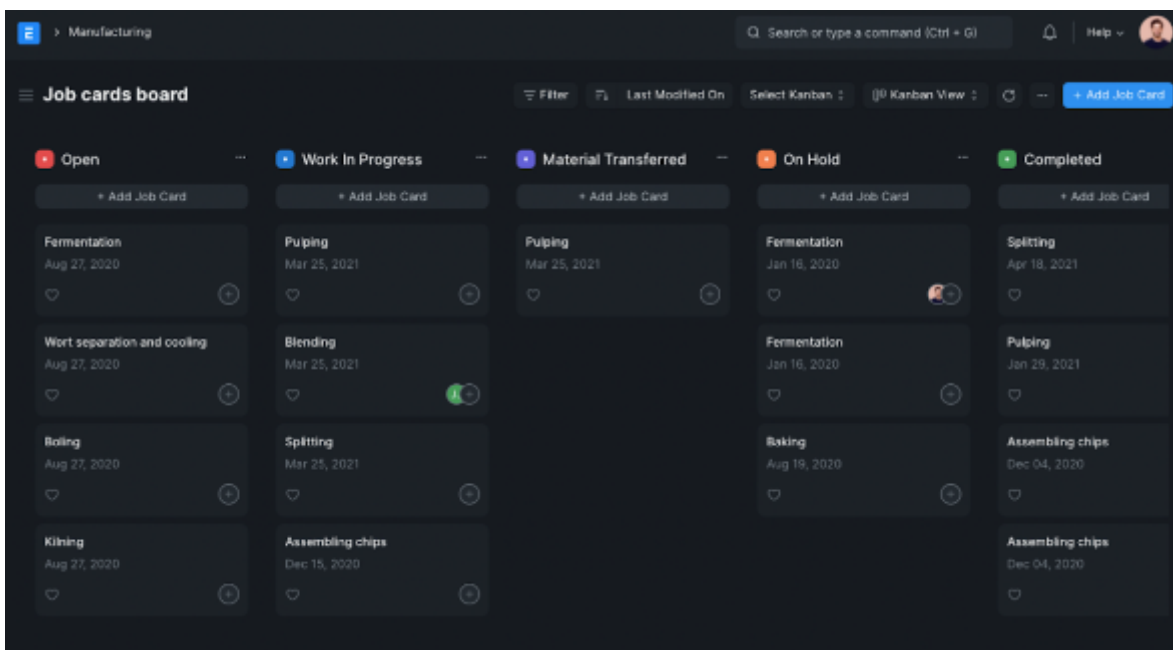- Razorpay
- Slack
- Google
- Exotel
- AWS

Graphical Representation
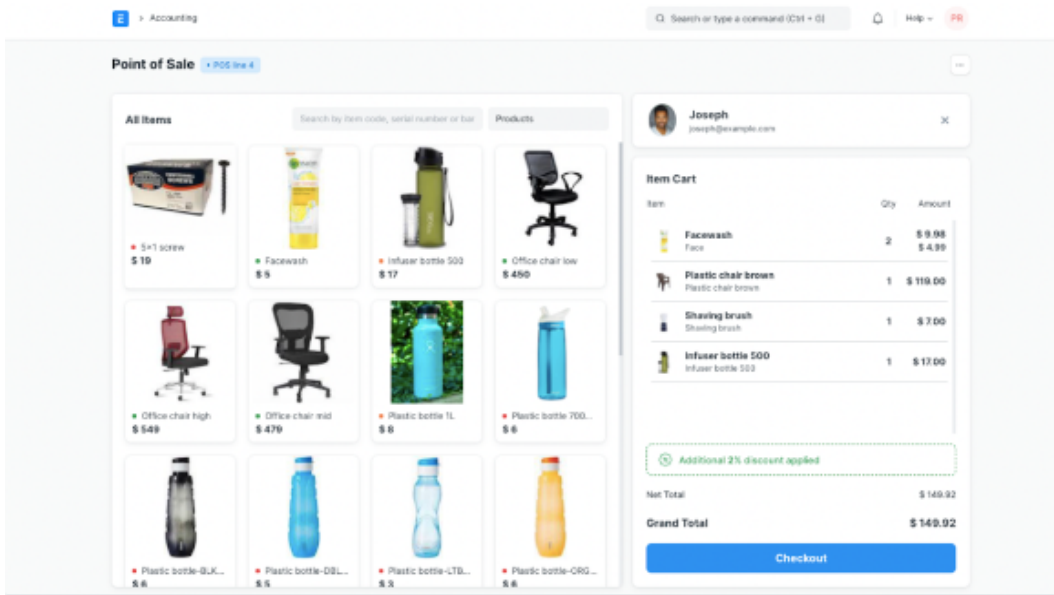
Fig. 1. ERPNext Dashboard.

The dashboard interface is a great tool to quickly and easily track operations. It provides an overview of the organisation's financial performance, allowing managers to quickly identify areas that need improvement and allocate resources accordingly. It can be customised to display financial and performance metrics, making it easier to identify areas for improvement.
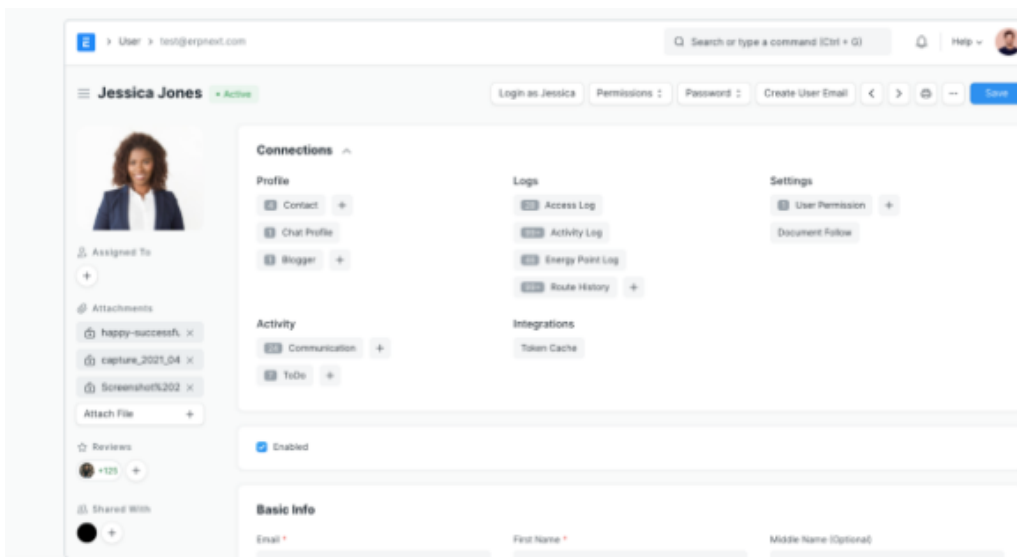
Fig. 2. ERPNext Kanban interface.

Kanban interface can help better manage finances, as it will provide an organised view of financial data. It provides an easy-to-use interface for visually tracking projects and tasks, making it easier to stay organised and up to date on progress. This can help to support better decision-making and increase efficiency.

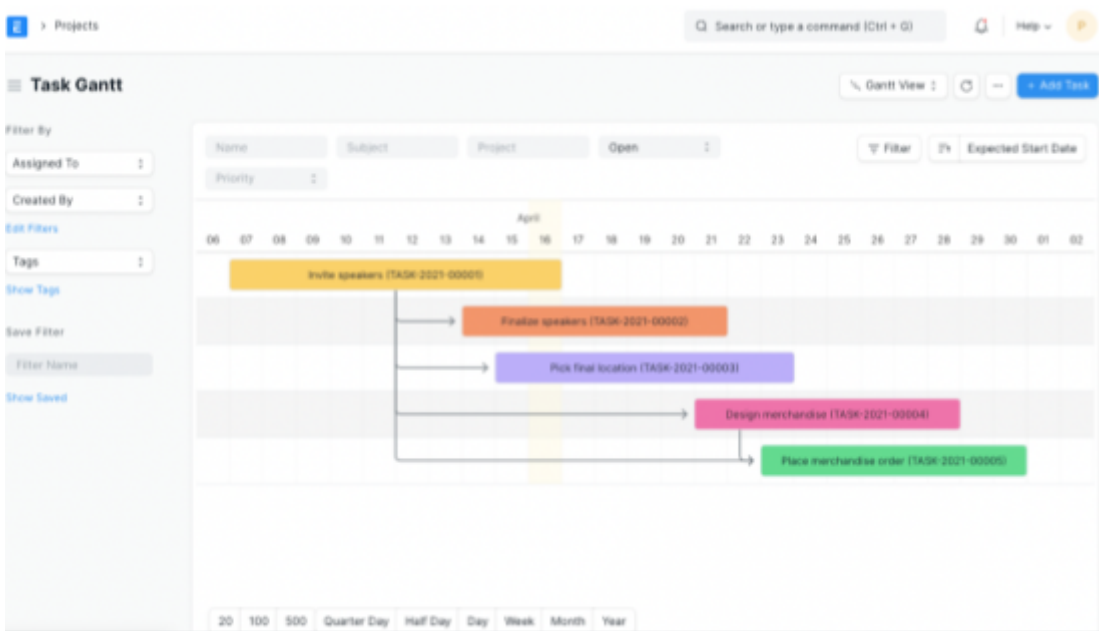Fig. 3. ERPNext Point of sales interface.

It can help streamline a wide range of processes. For example, it will allow organisations to quickly and easily track sales, donations, and inventory levels without the need for manual data entry. Additionally, ERPNext POS interface can be used to generate real-time reports, allowing them to quickly access information on their performance and track their progress.

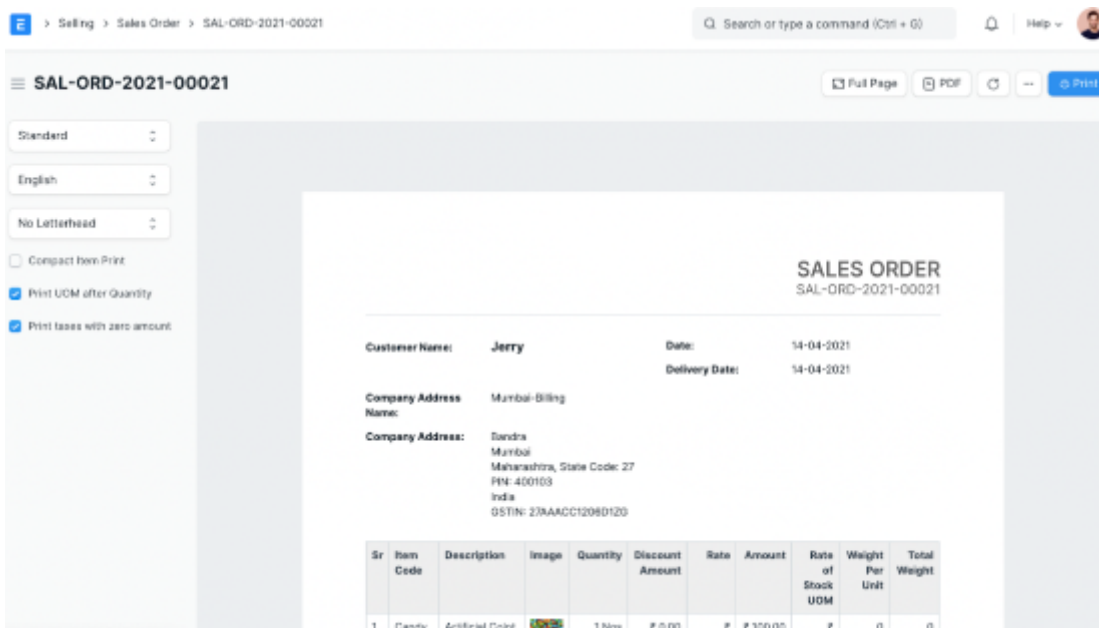Fig. 4. ERPNext User Management interface.

ERPNext's User Management interface is a powerful tool to manage user accounts, assign user roles, and customise access to data and permissions. It provides insights into user activity, such as who has logged in, when, and from where. It also provides an understanding of how users interact with their data, helping to make more informed decisions about data security and access. All in all, ERPNext's User Management interface is a powerful tool to better protect data.

Fig. 5. ERPNext Project interface.

Project Interface allows NPOs to manage multiple projects and tasks in an organised manner, assign resources, and track progress. This provides a powerful platform to help effectively manage their resources, track their performance, and reduce operational costs.

Fig. 6. ERPNext Sales order interface.

ERPNext Sales Order Interface is an invaluable tool, as it makes it easier to manage and track sales orders. This user-friendly interface can help to streamline the organisation's sales process, while providing real-time visibility into the status of orders.

Limitations

- Lacks intuitive user interface
- Offers limited integration capabilities

- Lacks robust technical documentation
- Lacks proactive support team

Conclusion

Organisations can benefit greatly from ERPNext, as it provides all the necessary tools to manage complex operations while reducing costs and improving efficiency. The features, such as accounting, budgeting, and reporting, can help NPOs streamline their workflow and get the most out of their resources. Additionally, the tool is designed to be user-friendly, meaning that employees can quickly learn how to use the system and get up and running quickly. This can help organisations save time and money in the long run by eliminating the need for costly IT support.

Donor Management System in ERPNext

Introduction

A donor management system, often referred to as a donor database or donor relationship management system, is a software tool or system used by non-profit organisations and charities to effectively manage and maintain relationships with their donors and supporters. The primary purpose of a donor management system is to help non-profits streamline their fundraising efforts, improve communication with donors, and ensure that fundraising and donor-related activities are organised and efficient.

Top 9 Features Nonprofits Can Use in ERPNext DMS:

Donor Profiles: The DMS system allows organisations to create and maintain comprehensive profiles for each donor. This includes contact information, donation history, giving preferences, and other relevant data. These profiles help organisations personalise their interactions with donors.
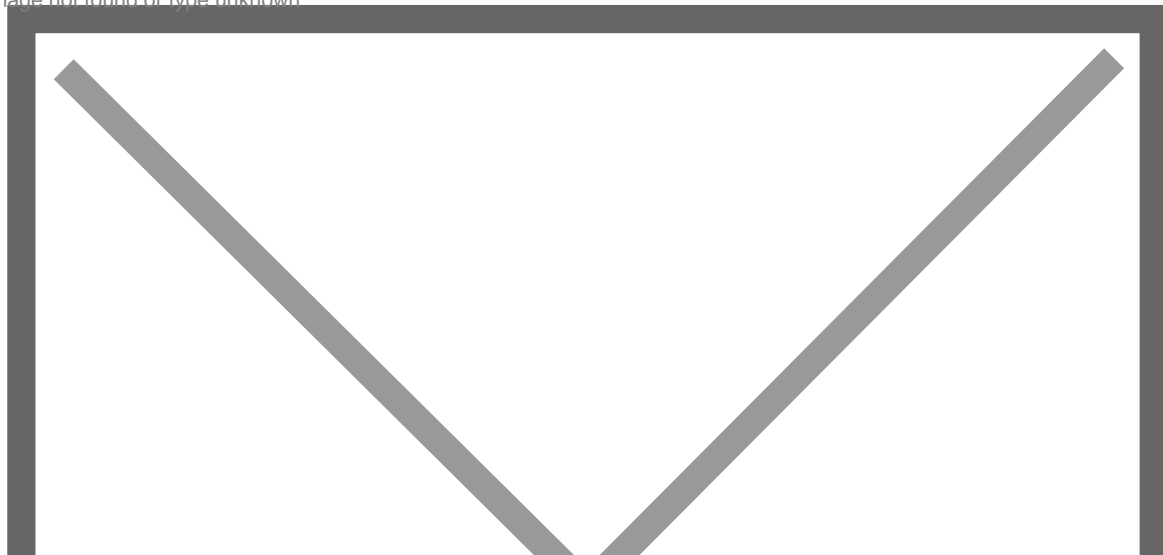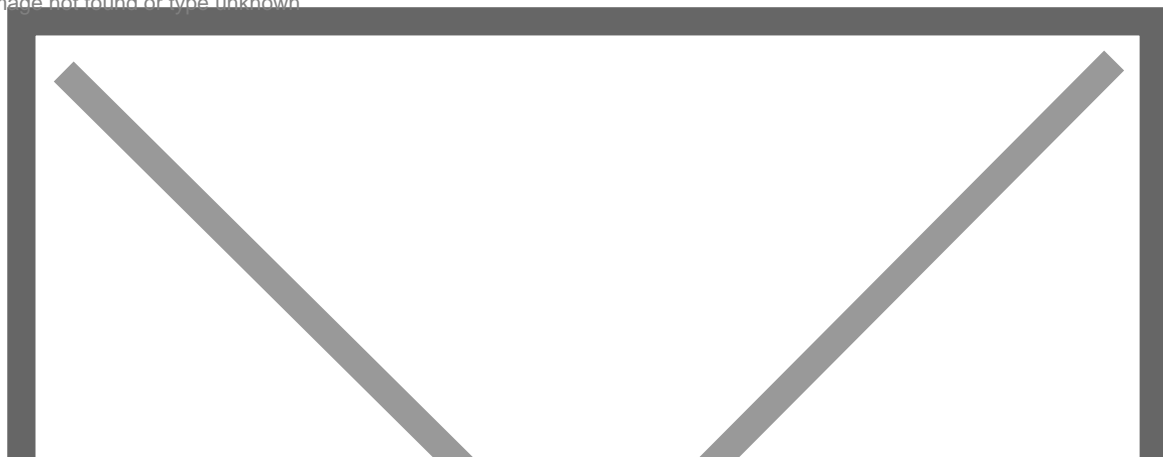
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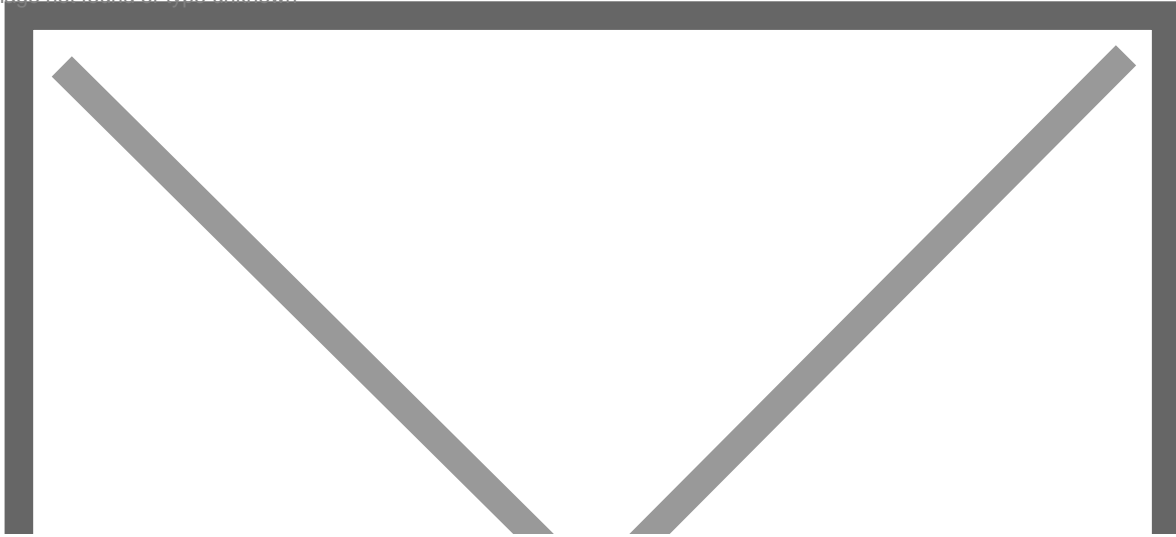Image not found or type unknown

Donation Tracking: Donor management systems enable organisations to record and track all donations received. This includes details such as donation amounts, dates, payment methods, and campaign or fund designations.
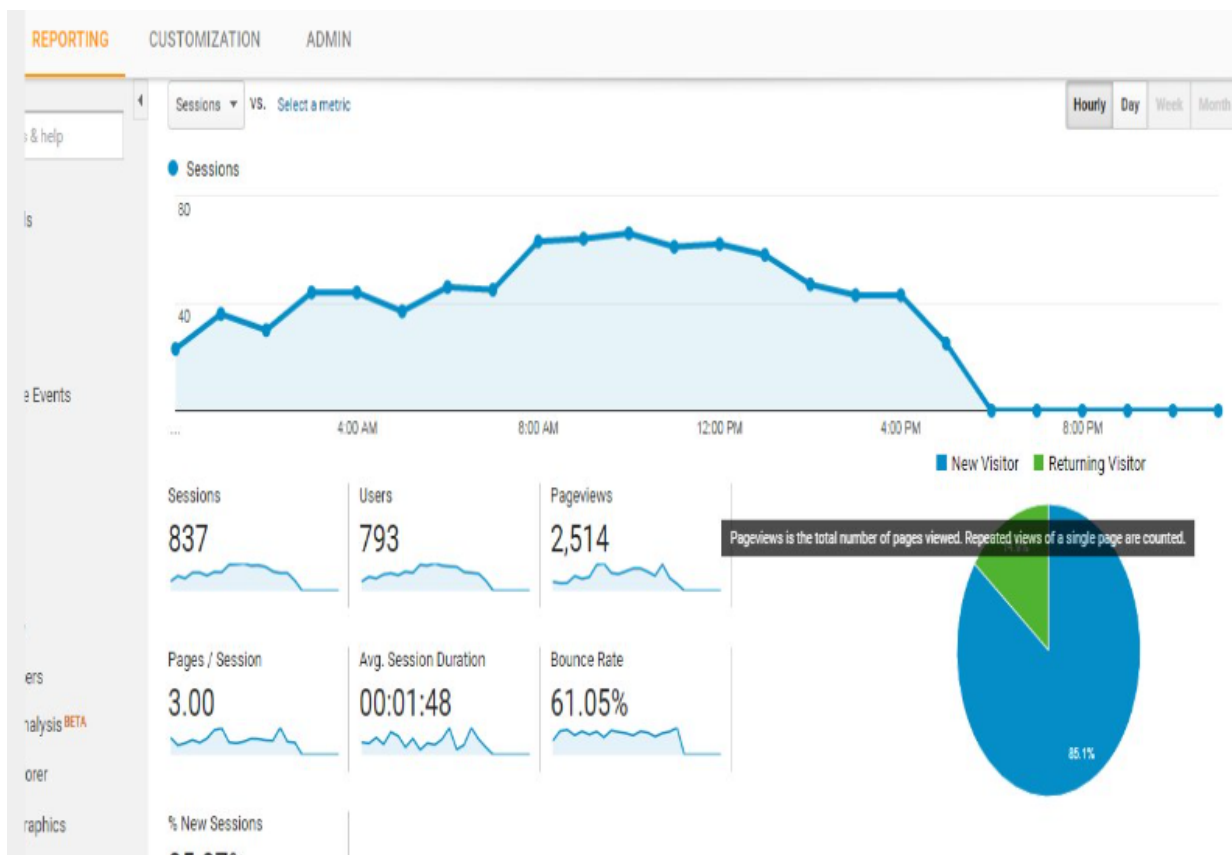
Communication Tools: DM Systems include email marketing and communication tools that allow organisations to send personalised messages, newsletters, and updates to donors. These tools help in engaging donors and keeping them informed about the organisation's activities and impact.

Reporting and Analytics: Donor management systems offer reporting and analytics features to help organisations analyse donor data, measure fundraising performance, and make data-driven decisions. Reports can include financial summaries, donor retention rates, and campaign results

Acknowledgment and Receipts: The system can automate the generation of thank-you letters, donation receipts, and acknowledgments, which are crucial for donor stewardship and compliance.

Grant and Proposal Tracking: For organisations that seek grants or submit proposals, these systems can help manage the application process, deadlines, and grant-related documentation.

Security and Compliance: Donor management systems often have security features to protect donor data and ensure compliance with data protection regulations.

Integration: Integration capabilities with other software tools, such as accounting software or website donation forms, can help streamline data entry and maintain data accuracy.

Continuous Improvement: Regularly review and update your ERPNext setup to meet changing donor management needs and compliance requirements.

Limitations:

Limited Donor-Centric Features: ERPNext is primarily designed as a general-purpose ERP system and may not have all the specialised features required for comprehensive donor management. You might need to customise the system to meet your specific donor tracking and engagement needs.

Learning Curve: Implementing and customising ERPNext can be complex, and it may require a significant learning curve for your team. This can be a challenge for nonprofits with limited IT resources or technical expertise.

Regulatory Compliance: Nonprofits often need to adhere to specific regulations and reporting requirements. Ensuring that ERPNext can meet these compliance needs may require additional customization and expertise.

Conclusion:

By adopting the ERPNext Donor Management System, nonprofit organisations can optimise their fundraising efforts, strengthen donor relationships, and allocate more resources toward their core mission. In an era where transparency and efficiency are paramount, the ERPNext Donor Management System is a valuable tool for nonprofits committed to making a positive impact on their communities and the world.
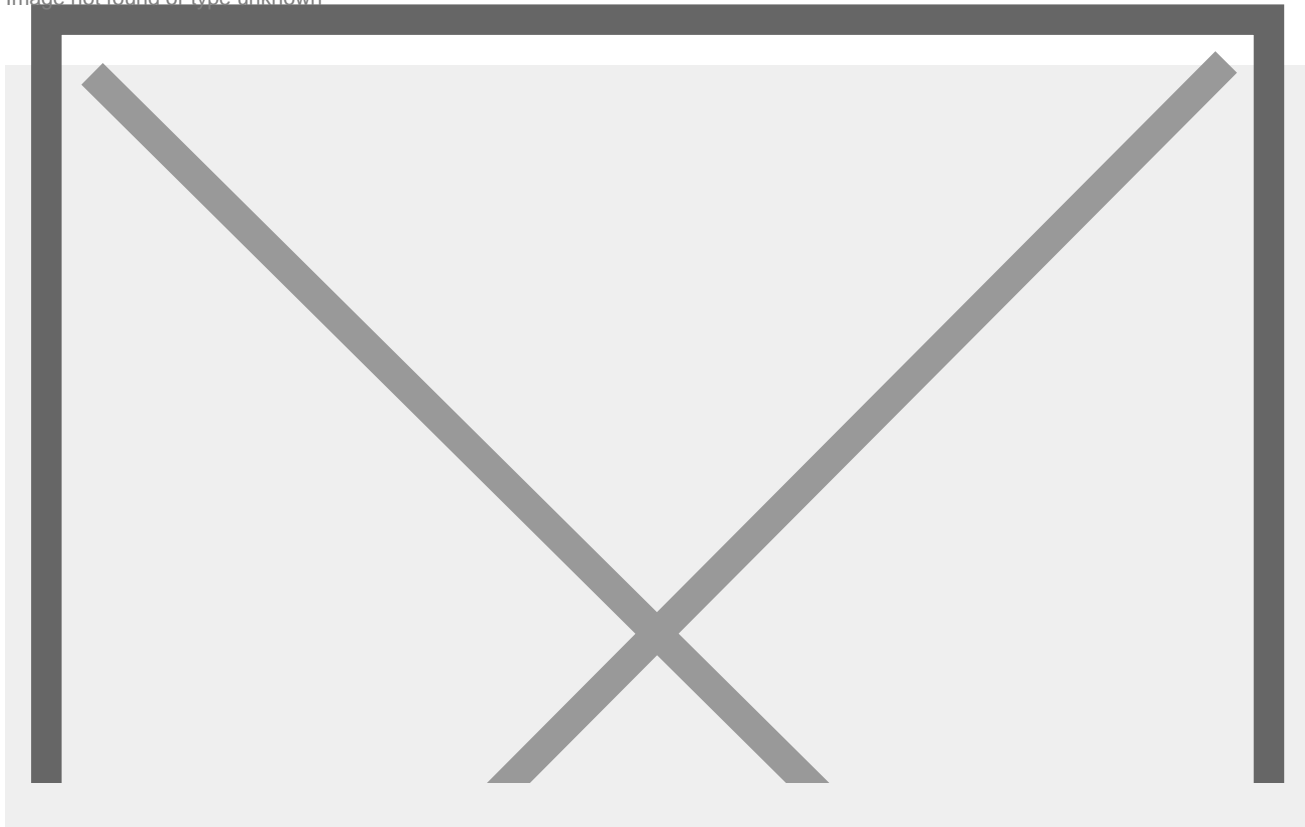
HR Management System in ERPNext

Introduction

The ERPNext HR workspace for non-profits is a versatile and user-friendly solution designed to streamline and enhance human resource management within charitable organisations. It offers a range of tools and features to help non-profits efficiently manage their staff, volunteers, and the unique HR challenges they face, ultimately enabling them to focus more on their mission-driven work.

Top 9 Features Nonprofits Can Use in ERPNext HR Workspace:

Employee and Volunteer Management: Keep detailed records of both paid staff and volunteers, including their contact information, roles, qualifications, and availability.
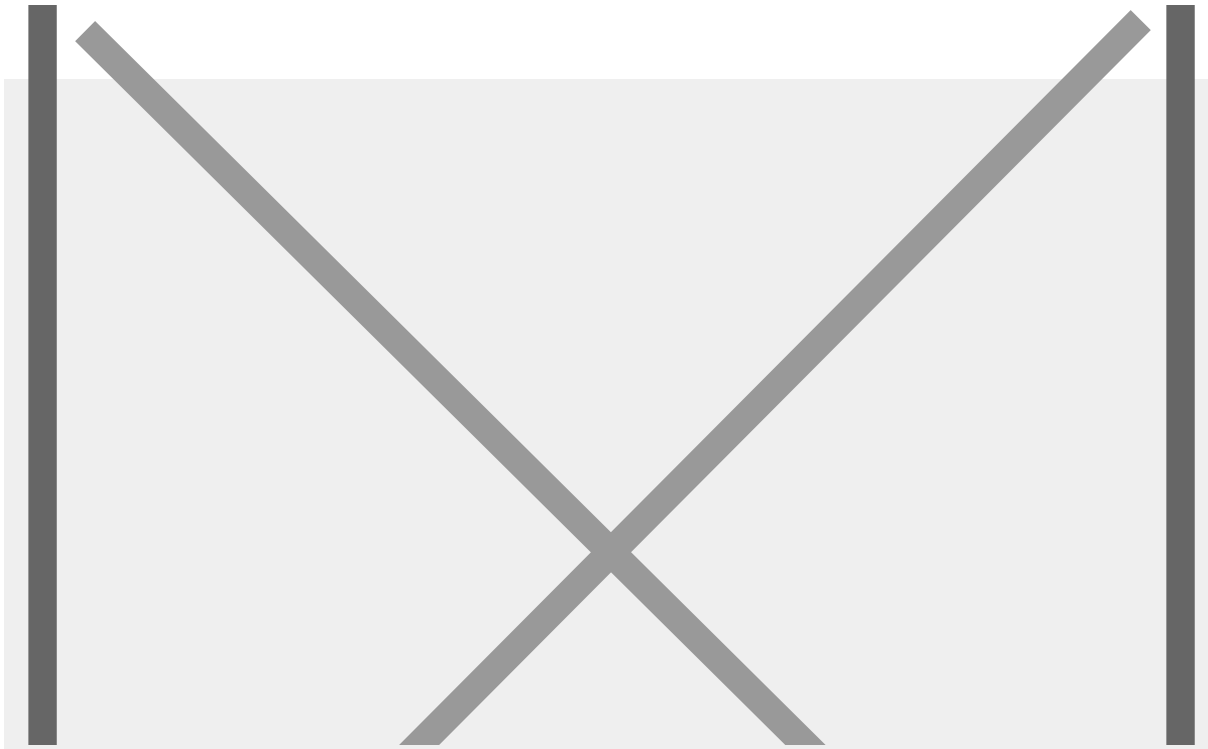
Recruitment and Onboarding: Streamline the hiring process with tools for posting job openings, tracking applicants, conducting interviews, and managing the onboarding process for new hires and volunteers.

Attendance Management: Record and monitor attendance for both regular employees and volunteers, ensuring accurate tracking of work hours and volunteer commitments.

Leave Management: Allow staff and volunteers to request and manage leaves while maintaining visibility into leave balances and approvals.

Payroll Processing: Automate payroll calculations, including deductions and taxes, to ensure accurate and timely compensation for employees. This is particularly important for nonprofits that have both salaried and hourly workers.

Training and Development: Track employee and volunteer training requirements, certifications, and ongoing professional development to ensure that your team is well-prepared for their roles.

Performance Management: Implement performance appraisal processes to evaluate and provide feedback to employees and volunteers, helping them grow and contribute more effectively to the organisation's mission.

Compliance and Reporting: Generate reports and analytics related to HR metrics, compliance with labour laws, diversity, equity, and inclusion efforts, and other key performance indicators.

Document Management: Store and manage HR-related documents, such as contracts, policies, and certificates, in a secure and organised manner.

Benefit Management: Administer employee benefits, such as health insurance, retirement plans, and other perks, ensuring that staff and volunteers have access to necessary resources.

Self-Service Portals: Provide employees and volunteers with self-service portals to access their personal information, submit leave requests, and view pay stubs, reducing administrative overhead.

Mobile Accessibility: Access HR information and perform essential HR tasks on mobile devices, enabling flexibility for remote or field-based staff and volunteers.

Limitations:

The limitation of the ERPNext HR module is its complexity and learning curve. Implementing and customising the HR module can be challenging for some organisations, particularly those with limited IT resources or technical expertise. This complexity may require additional training and support to fully utilise the module's features effectively.

Conclusion:

In conclusion, non-profit organisations can benefit from adopting the ERPNext HR System. This versatile and feature-rich solution offers the tools and capabilities needed to streamline human resource management, enhance workforce efficiency, and support the unique needs of nonprofits.

Dolibarr

Dolibarr is an open-source, web-based business management software suite that provides a range of integrated modules for managing various aspects of a business, including accounting, customer relationship management (CRM), human resources, inventory management, and more.

It is designed for small and medium-sized enterprises (SMEs) and offers features to help businesses streamline their operations, automate processes, and improve overall efficiency.

Features of the tool:

- Streamlined various operations.
- Cost-effective.
- Highly customizable.
- Scalable
- Collaborative.
- Accessible through mobile.
- Active Community and Support
- Compliance and Security.

Benefits for NPOs:

- Dolibarr is released under an open-source licence, which means it is free to modify, and distribute.
- It has an active community of users and developers who contribute to its development and provide support.
- Dolibarr can be self-hosted on a web server or accessed as a cloud-based solution.
- Reporting and analytics.
- Customization, collaboration and communication.
- Dolibarr provides integrated modules for various integrated functions such as accounting, CRM, inventory management, human resources, and more.

Why Nonprofits can use Dolibarr:

- Its an open source tool
- Quick setup and efficient tool.
- It also provides user access controls and data encryption to protect sensitive business data.
- This helps to meet regulatory requirements and ensures data security.
- Regular updates, bug fixes, and documentation, as well as a community forum for users to seek help and share knowledge.
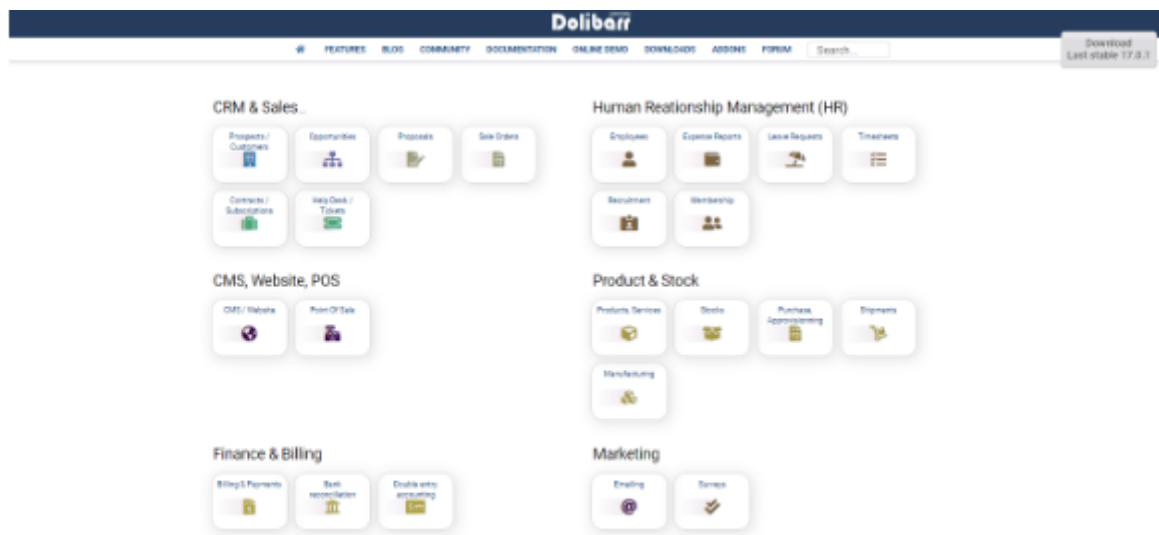- This ensures access to ongoing support and resources.

Supported Database:

Dolibarr is a flexible and adaptable business management software suite that supports multiple databases. As an open-source software, Dolibarr can be used with various popular database management systems (DBMS) depending on the setup and configuration chosen by the user. MySQL, PostgreSQL, SQLite and Oracle are supported by Dolibarr
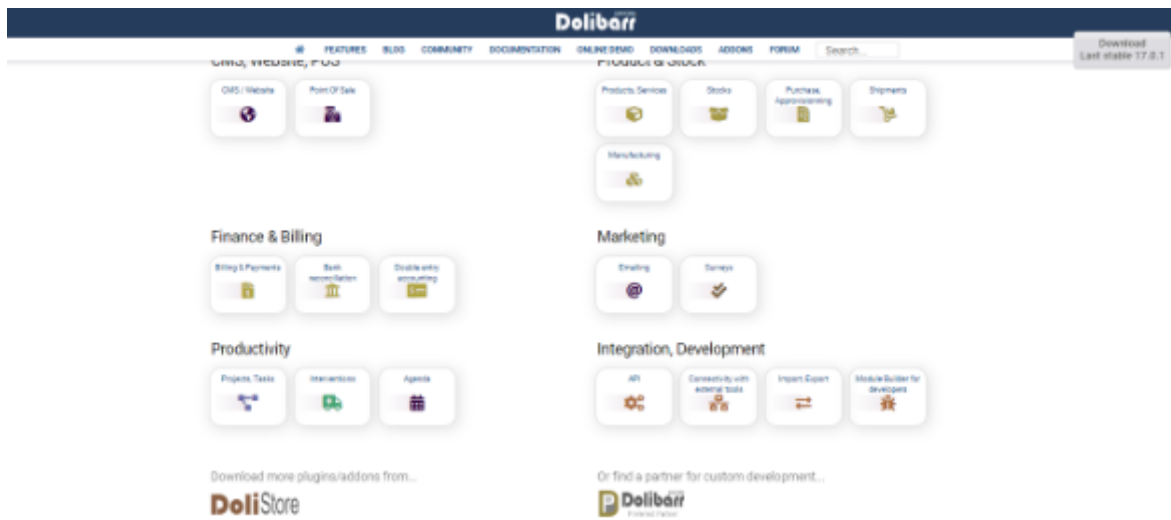
Graphical Representation:

Fig .1. Home Page: it is a dashboard where all the folders in the root folders are listed, where tools are used to create reports, visualise data and charts that can be embedded in web-based and applications.

Fig. 2. & Fig.3. It provides different services with different parameters.

Conclusion:

Dolibarr is an open-source, web-based business management software that is a flexible and adaptable business management software suite that supports multiple databases. This helps to meet regulatory requirements and ensures data security, regular updates, bug fixes and documentation, as well as a community forum for users to seek help and share knowledge.

CiviCRM

A free open source Customer Relationship Management (CRM) software designed primarily for use by non-profit organisations to assist in maintaining relationships between their supporters and constituents.

CiviCRM's open source design and comprehensive documentation make it highly customizable for any marketing operations, including NPOs. It can be tailored to meet the specific requirements of any NPOs, allowing them to easily manage their marketing campaigns and track their success. It offers a suite of tools to manage contacts, donations, memberships, events, email marketing, and other activities. Specific needs of NPOs can include tracking donor activity, engaging with volunteers, and managing fundraising campaigns.

CiviCRM is a great tool for NPOs to use in their operations. It's a useful tool for case/event management, contacts, members, and fundraising campaigns. They can also use the bulk-mailing functionality to reach potential donors with direct mail campaigns. Additionally, CiviCRM's integrations with payment gateways make it easy to process donations and other payments for events and memberships.

Over 11,000 NPOs around the world use CiviCRM to build and manage their donor, member, and constituent bases. CiviCRM can be used to store contact data, send personalised messages, plan events, manage membership programs, organise advocacy campaigns, and more.

Features of the tool

- Contact Management
- Configurable & Customisable
- Membership Management
- Accounting Integration
- Case Management
- Event Management
- Email Marketing
- Contribution Management
- Advocacy Campaigns
- Peer- to - Peer Fundraising
- Reports
- Compatible with Drupal, Wordpress, and Joomla

Benefits for Nonprofits

- It provides an efficient way to store and manage contact information for their constituents, volunteers, donors, and other stakeholders. This makes it easier to track relationships and remain organised

- It can be tailored to meet the specific requirements of NPOs, making it highly customizable and configurable.
- CiviCRM enables better engagement with members and track participation by making membership management easier and more efficient. This helps to ensure that their efforts are reaching the right people.
- It facilitates accounting integration, streamlining the financial processes by enabling them to more efficiently track and manage financial information.
- Provides an organised system for managing cases, allowing NPOs to ensure that their cases are handled promptly and effectively, thus enabling them to better serve their constituents.
- Easily manage and track attendance for events, making them run efficiently and successfully.
- It enables NPOs to deliver tailored email campaigns to their constituents, making sure that the correct message is delivered to the right people.
- It facilitates to efficiently track, manage, and process donations, thus ensuring the success of fundraising efforts.
- It provides the tools necessary to efficiently set up and track the progress of advocacy campaigns, making it easier to effectively promote causes and raise awareness.
- It is an efficient way to facilitate peer-to-peer fundraising campaigns and monitor the success, enabling NPOs to involve their supporters and amplify their fundraising efforts.
- It offers a range of reports to assist in monitoring progress and evaluating outcomes. This enables organisations to stay on track and assess their progress towards their objectives.
- CiviCRM is designed to be easily integrated with a range of content management systems, such as Drupal, Wordpress, and Joomla, thus allowing NPOs to take advantage of improved online presence and increased reach.
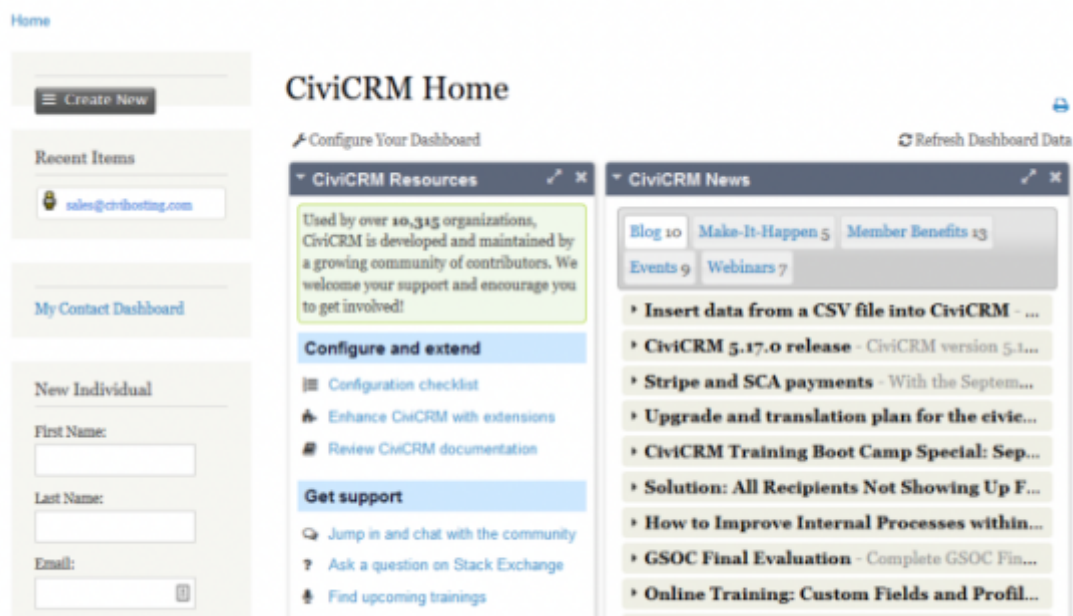
Integrations

- CSM: Wordpress, Joomla Drupal.
- Payment systems: Strip, Paypal, iATS, TSYS.
- Bulk emails: CiviSMTP, Mailchimp.

Why Nonprofits can use ERPNext

- Its an open source tool
- CiviCRM simplifies donation tracking, event management, and contact management
- It saves time and money in fundraising processes.
- It integrates with major content management systems.
- Supports localization for global reach, it tracks and measures NPOs fundraising efforts around the world.
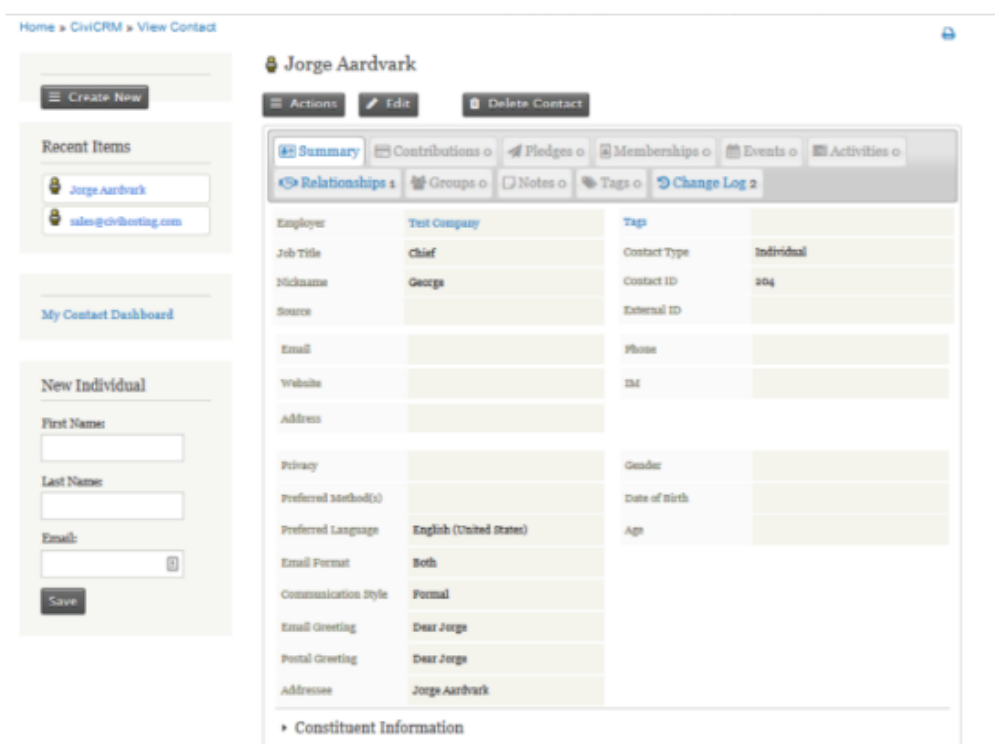
Graphical Representation:

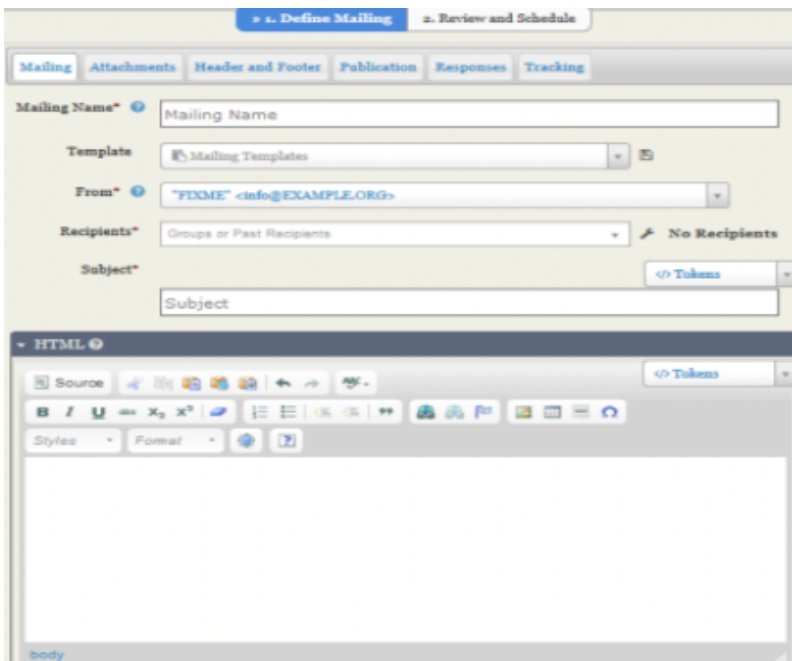Fig. 1. CiviCRM Dashboard Configuration Interface

CiviCRM provides a customizable dashboard for NPOs and provides the ability to create quick links and include content about donors or customers on the main page.

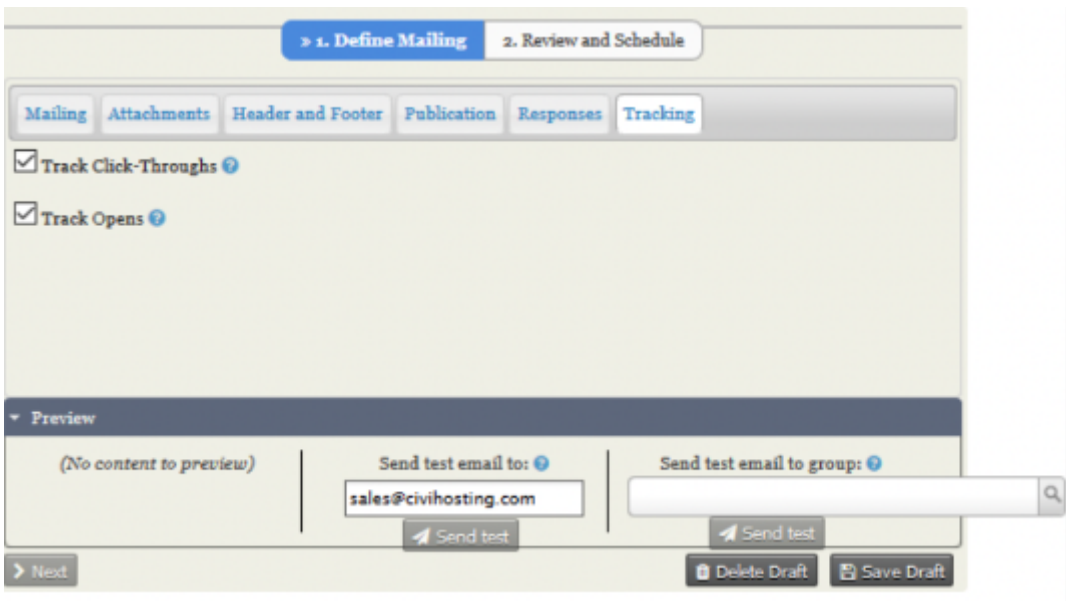Fig. 2. CiviCRM Donor Management interface

Maintaining a large list of donors in a central database with CiviCRM can help to build strong relationships, save costs on duplicate mailings, and facilitate direct interactions. This can help to foster trust and loyalty between the NPOs and its supporters.
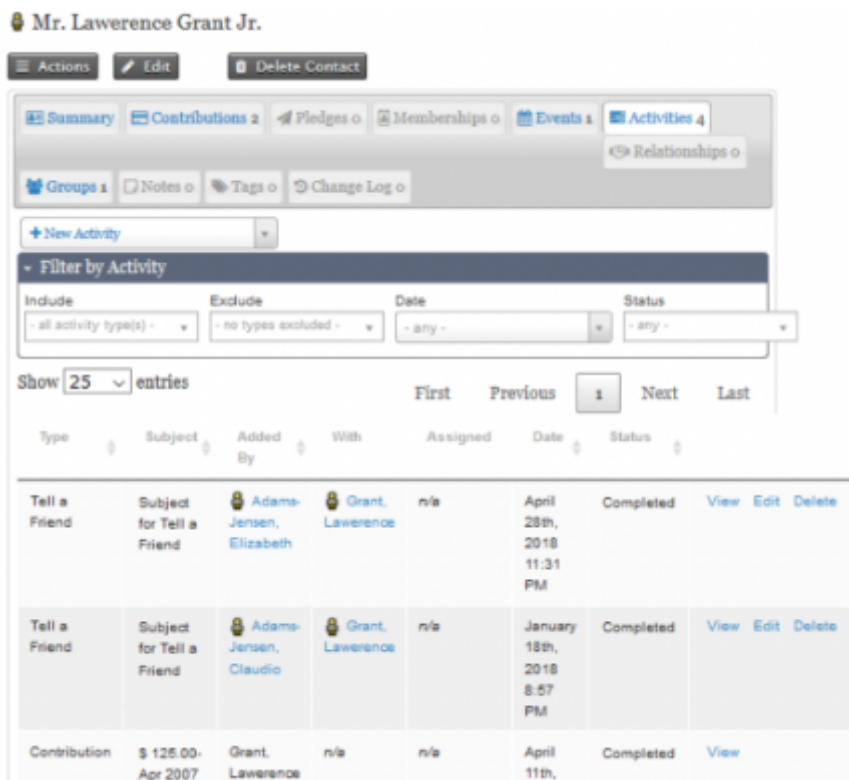
Fig. 3. Email Marketing interface

CiviCRM's bulk mail capabilities make it a powerful tool to reach target audiences. With the ability to construct emails in HTML and text, create personalised templates, and segment lists into specific interest groups, NPOs can craft effective fundraising campaigns, event invitations, and other messages to reach their supporters.
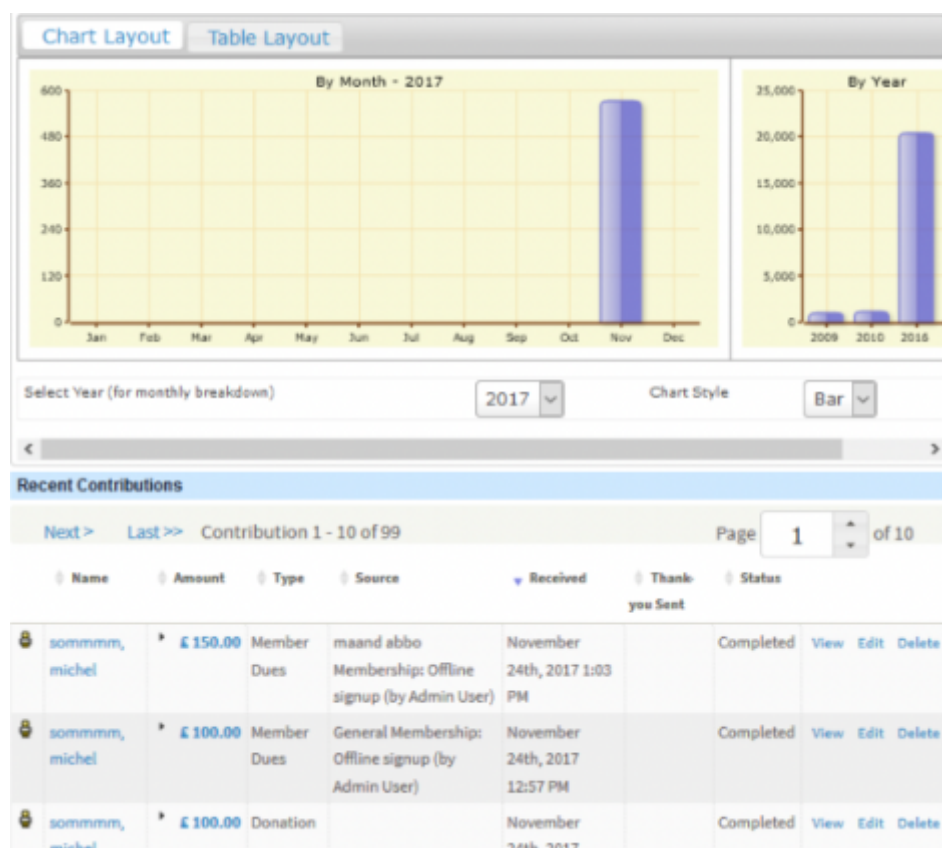
Fig. 4. Email tracking interface

NPOs can use email tracking to identify which emails are opened as well as the click through rates for links contained within their messages. This can help them measure their success in reaching their target audience and building relationships with supporters. Additionally, they can monitor their bounce rates and unsubscribe events to ensure their emails are reaching the right people.

Fig. 5. Activity tracking interface

Tracked activity in a grid to see how individuals have responded to their mailings, events and other activities. This can help them better understand engagement with their target audience and better tailor their outreach efforts to ensure they are reaching the right people.

Fig. 6. CiviCRM Reporting interface

CiviCRM also includes over 40 built-in reports that are easily modifiable, which can be used to track donations, memberships, and more. Files can be printed in PDF or HTML formats and exported as CSV. Reports can also be integrated back into the application to create new groups or segments, which can then be used for targeted mailings or other activities by NPOs. Data can be displayed in table or graph formats, such as pie or bar charts.

Limitations

- User interface needs improvement.
- Public Relation and marketing needs to follow up
- Technical help is needed in the long run

Conclusion

CiviCRM is a free and open-source customer relationship management software designed for non-profit organisations and civic sector entities. It offers tools for managing contacts, fundraising, events, memberships, and more. With a user-friendly interface and robust feature set, CiviCRM is a popular choice for organisations looking to streamline their operations and improve their engagement with supporters.

Odoo

Odoo is an open source tool for Customer Relationship Management CRM. It is a Belgian suite of business management software tools including e-commerce, billing, accounting, manufacturing, warehouse, project management, and inventory management.

It is known for making applications available for free in enterprise edition, it is a centralised database that helps you to store data in the cloud and also it helps to access & analyse the data. It is a ideal tool for non-profits because it is available for both on-premises and ready to use the SaaS environment. It provides source code for the Open Object framework and the core ERP modules.

Features of the tool:

- Schedule manufacturing orders and work orders automatically.
- collaborative and real-time project management
- Easily send mass mailings to your leads, opportunities and customers
- Reporting and Business Intelligence

Benefits of Nonprofits:

- Integrated and Modular Approach
- Customization and Flexibility
- Open Source and Cost-effective
- Improved Efficiency and Productivity
- Scalability and Growth
- Rich Feature Set
- Mobile Accessibility

Why Nonprofits use Odoo

- Its an open source tool
- Quick setup and ease to use
- It provides a modular approach, where we can choose and configure only the applications they need, and can add more modules as their requirements evolve.
- Reduce manual tasks and paperwork, which can lead to increased efficiency.
- Suitable solution for long-term growth plans.

Supported Database:

ODOO, being an open-source ERP (Enterprise Resource Planning) software, supports multiple databases as its backend. The supported databases for ODOO include:

1. PostgreSQL

2. MySQL
3. SQLite
4. Oracle Database
5. Data Source Connectors

   - Odoo Magento Connector
   - Odoo WooCommerce Connector
   - Odoo eBay Connector
   - Odoo Amazon Connector
   - Odoo PayPal Connector
   - Odoo QuickBooks Connector
   - Odoo Google Sheets Connector

Graphical Representation:

Fig. 1. Home page: Odoo provides seamlessly integrated functional business apps called Odoo apps that form an ERP solution when combined.
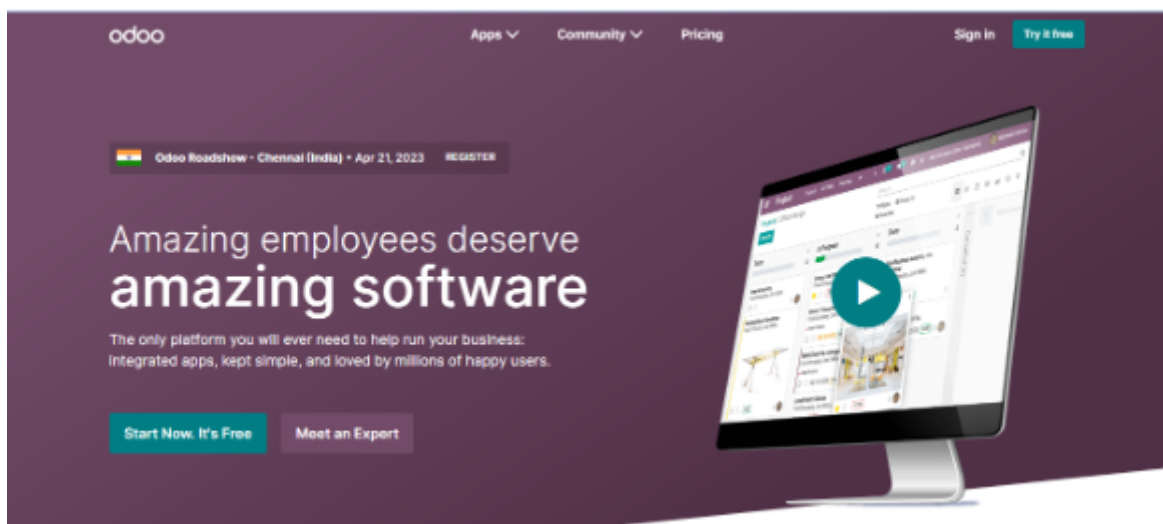

Fig. 2. Mobile Apps: Odoo is a suite of open source business apps that covers CRM, e-commerce, Accounting, inventory, point of sale, Project management, and more. The mobile app offers a smooth and friendly user experience that has been carefully built to ensure quick and seamless user adoption.
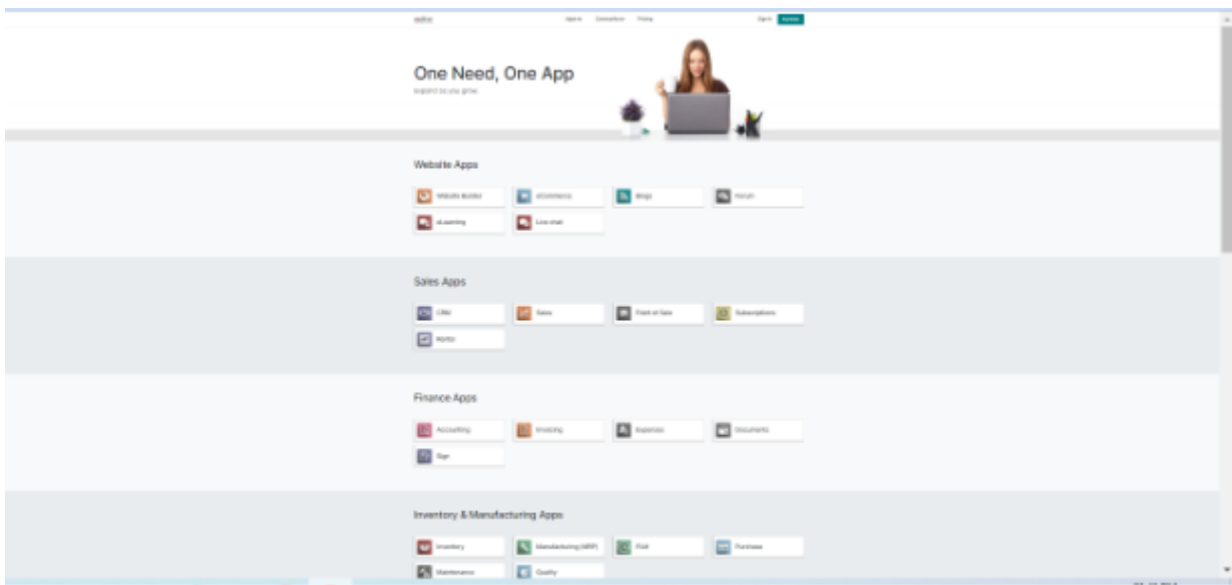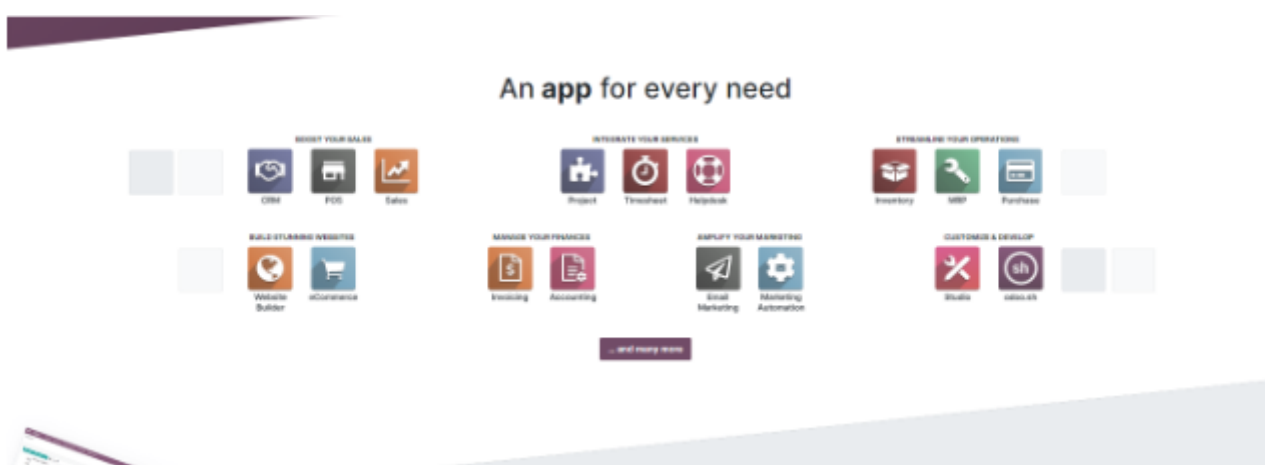
Fig. 3. App for every Need

Conclusion:

Odoo is an open source tool for CRM. It provides a modular approach, where NPOs can choose and configure only the applications they need, and can add more modules as their requirements evolve. They can also form collaborative and real-time project management and easily send mass mailings to your donors, funders and their constitutions. This business intelligence tool also helps NPOs report on data.

Tendenci

Tendenci is a powerful membership and association management solution designed for nonprofit associations, educational institutions, community foundations, and healthcare organisations of all sizes. It helps administrators manage events, fundraising campaigns, and job boards, set membership levels with custom pricing, take payments on their websites, communicate with constituents, track interactions, manage data, and customise member benefits.

NPOs are one of the typical customers of Tendenci, along with Freelancers, Large Enterprises, Mid Size Business, and Small Business. This is a free and open-source software code available on GitHub, supports large organisations with up to 15,000+ members and unlimited contacts.

Features of the tool

- Automated reports on memberships, events, donations, and website traffic.
- Donations & Fundraising management.
- Events Management.
- Search Engine Optimization. (SEO)
- Career Management.
- Content Management.
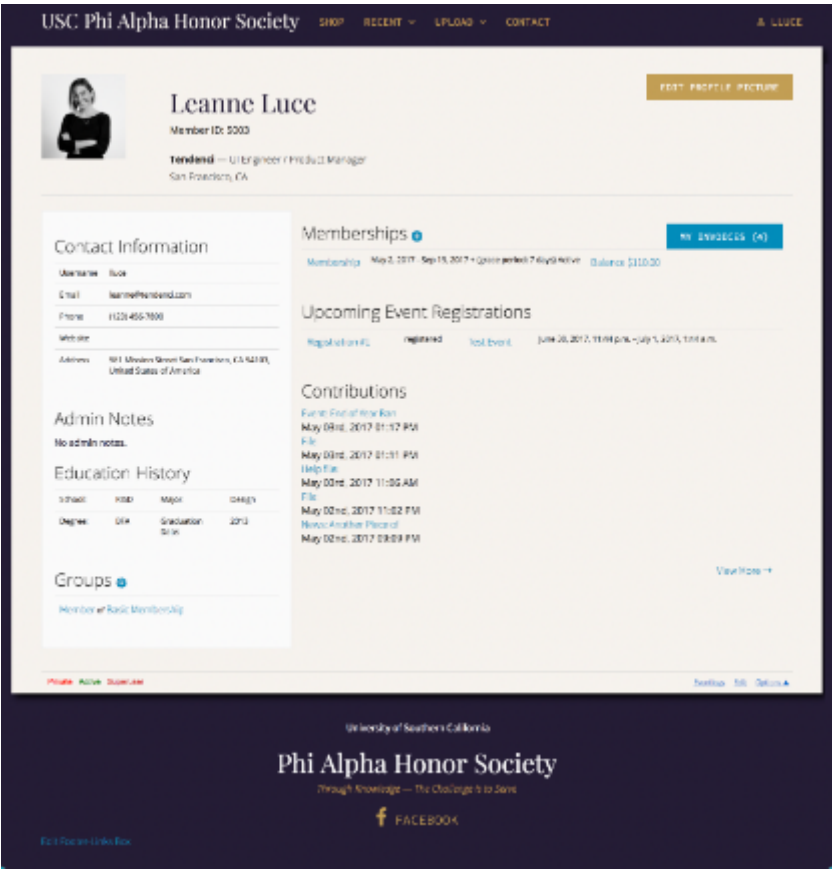- Forums.
- Track payments.

Benefits of Nonprofits

- Reports help in understanding their users, content, and activities, so they can make data-driven decisions. They can view donations, identify top donors, and track membership activity over time, plus use custom reports and SQL Explorer to pull any data they need.
- They can manage donations and fundraising by accepting payments online, organising donations, generating invoices and reports.
- Events Management feature makes it easy to organise, promote, and register events with online payments and registrations, plus 1-click emails to attendees, unlimited speakers, and Google Maps integration.
- Tendenci's Search Engine Marketing can help to improve their online visibility by optimising content for search engines, tracking analytics, and creating an XML sitemap.
- The Career Management Job Board let them create their own online career centre. It helps users search job listings, upload resumes, and receive notifications. It also allows HR personnel to post and maintain job listings with one-click approval. This saves time and ensures job postings are always up-to-date.
- Content Management Supports to customise and manage their website, including HTML and Template Editors, Feature Stories Module, Tendenci Admin Bar, and tiered Permissions.

- Tendenci Forums allow them to create online communities with restricted access, notifications, and collaboration.
- The payment gateway lets them manage financial transactions, issue invoices, and accept payments from providers like Stripe and Authorize.net.
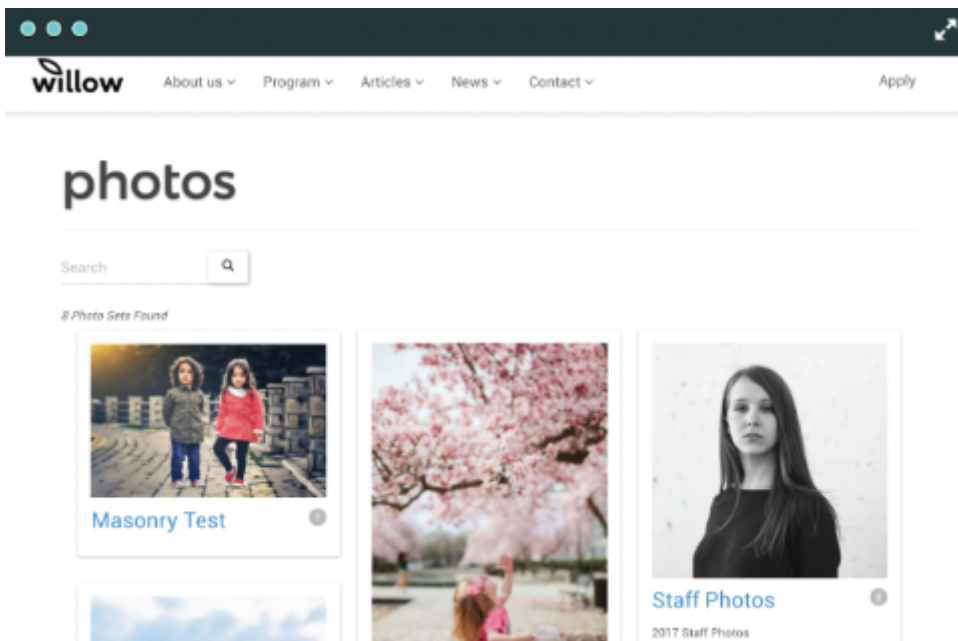
Graphical Representations:

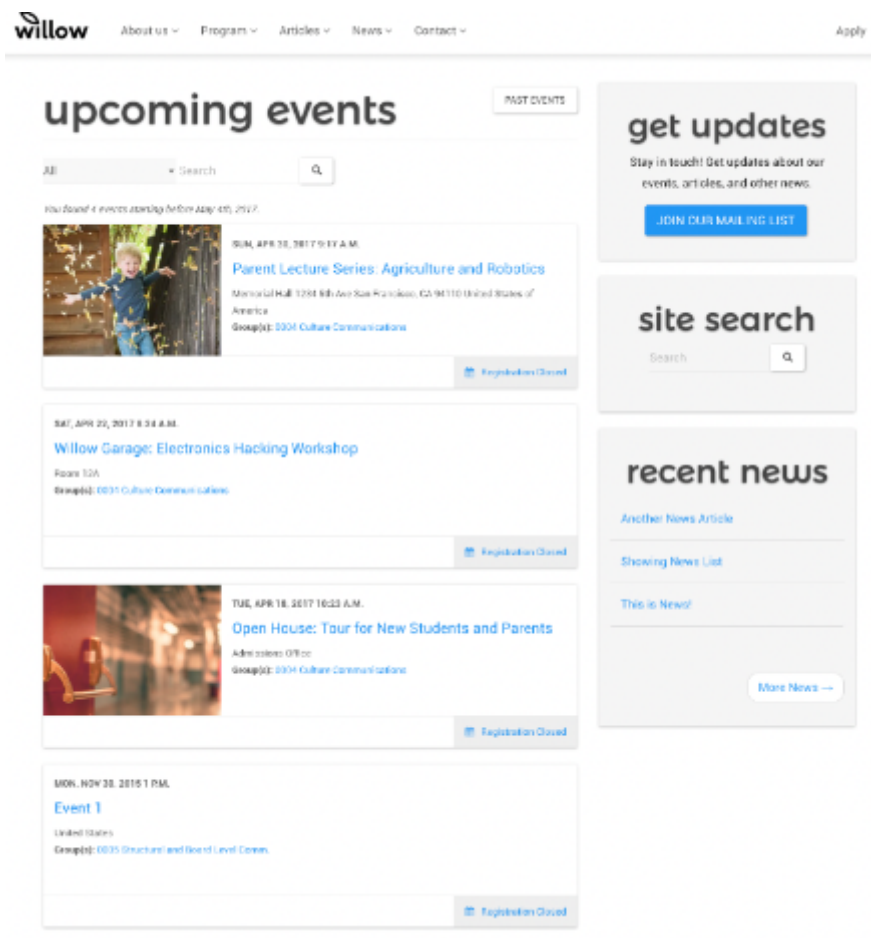Fig. 1. Comprehensive Membership Profile interface.

Access all information about your Members using Comprehensive Membership Profiles. Including Contact Info, Professional Affiliations, Invoicing, Groups, and Contributions to your organisation. Keep track of all donations and volunteering hours and see how each member is contributing to the success of your cause.
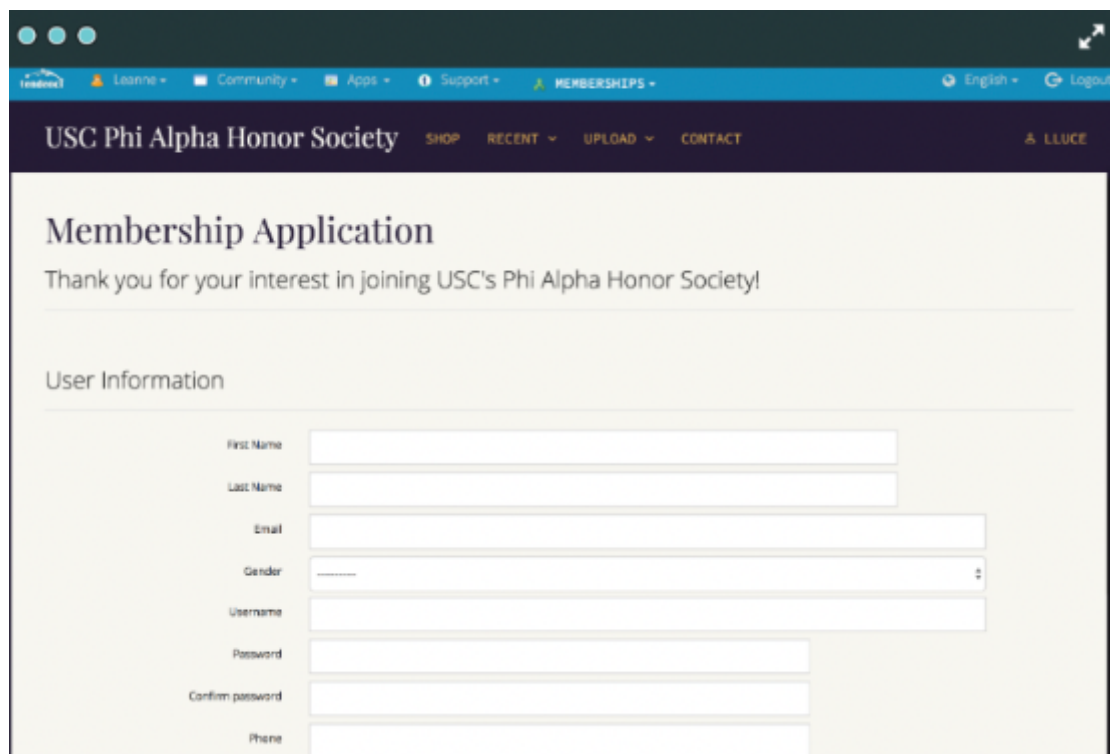
Fig. 2. Rich Media Management

Tell your story through photos and videos with the Rich Media Management module. Visually show off your events, products, and organisation activities and increase your traffic. The tool includes a complete digital asset management package to organise, collect, and share photos, videos, and documents on your Tendenci site.

Fig. 3. Event Management.

Calendar event management software helps organisations to organise, promote, and register their events with ease.

Fig. 4. Custom Forms

The custom forms module offers the ability to build a custom Member Application, create Surveys, make Donations, and sell Merchandise.

Conclusion

To conclude, Tendenci is a powerful and cost-effective open source AMS designed to meet the needs of NPOs. With its intuitive user interface, comprehensive feature set, and flexible customization options, the tool makes it easy for organisations to manage their members and donors, streamline their operations, and increase their reach and impact. It is a good choice for small grassroots organisations. Overall, Tendenci provides NPOs with the tools they need to succeed in their mission and make a difference in the world.