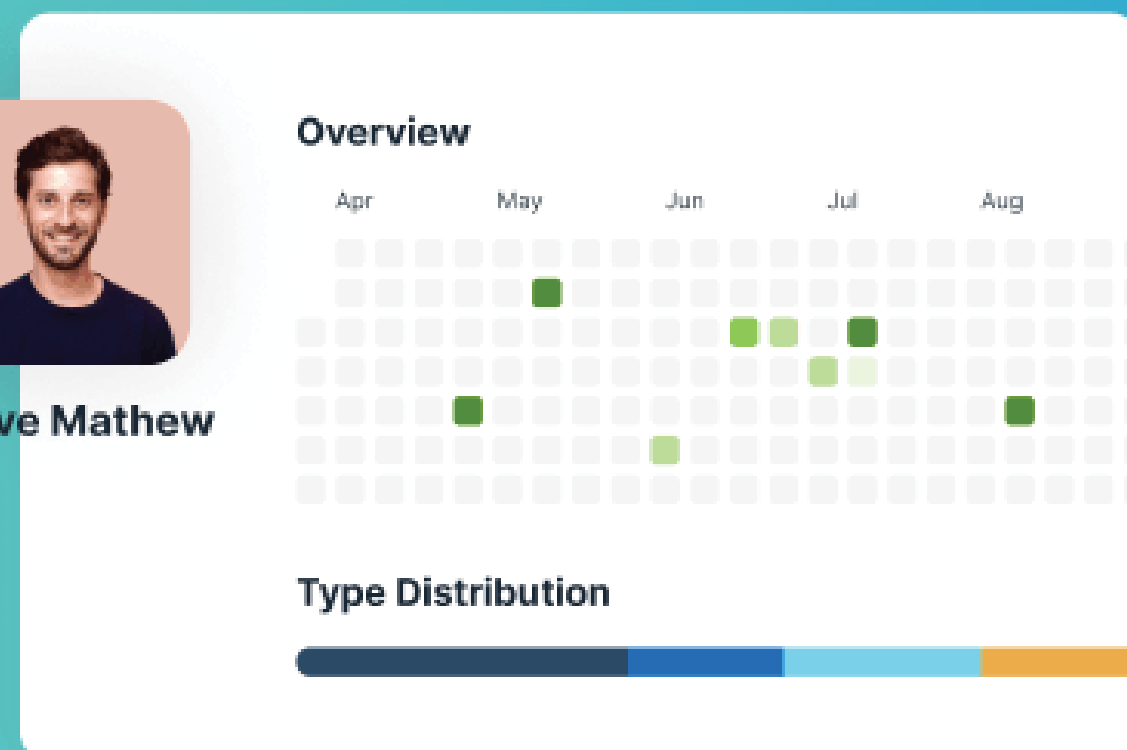


Steve Mathew



ERPNext

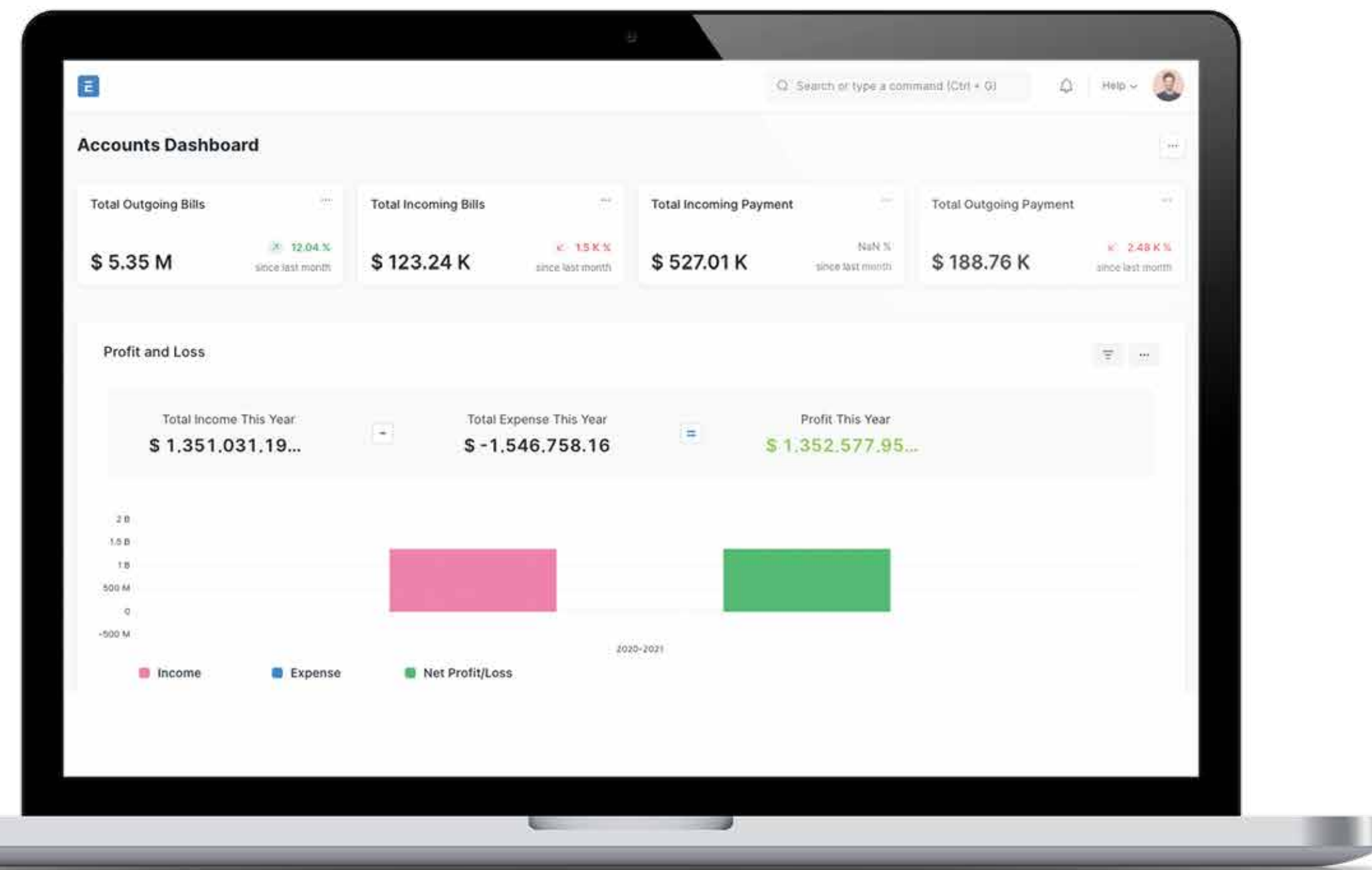
THE MOST AGILE ERP ON THE PLANET

ERPNext is the world's best free and open source ERP

COMPLETE, VERSATILE AND POWERFUL

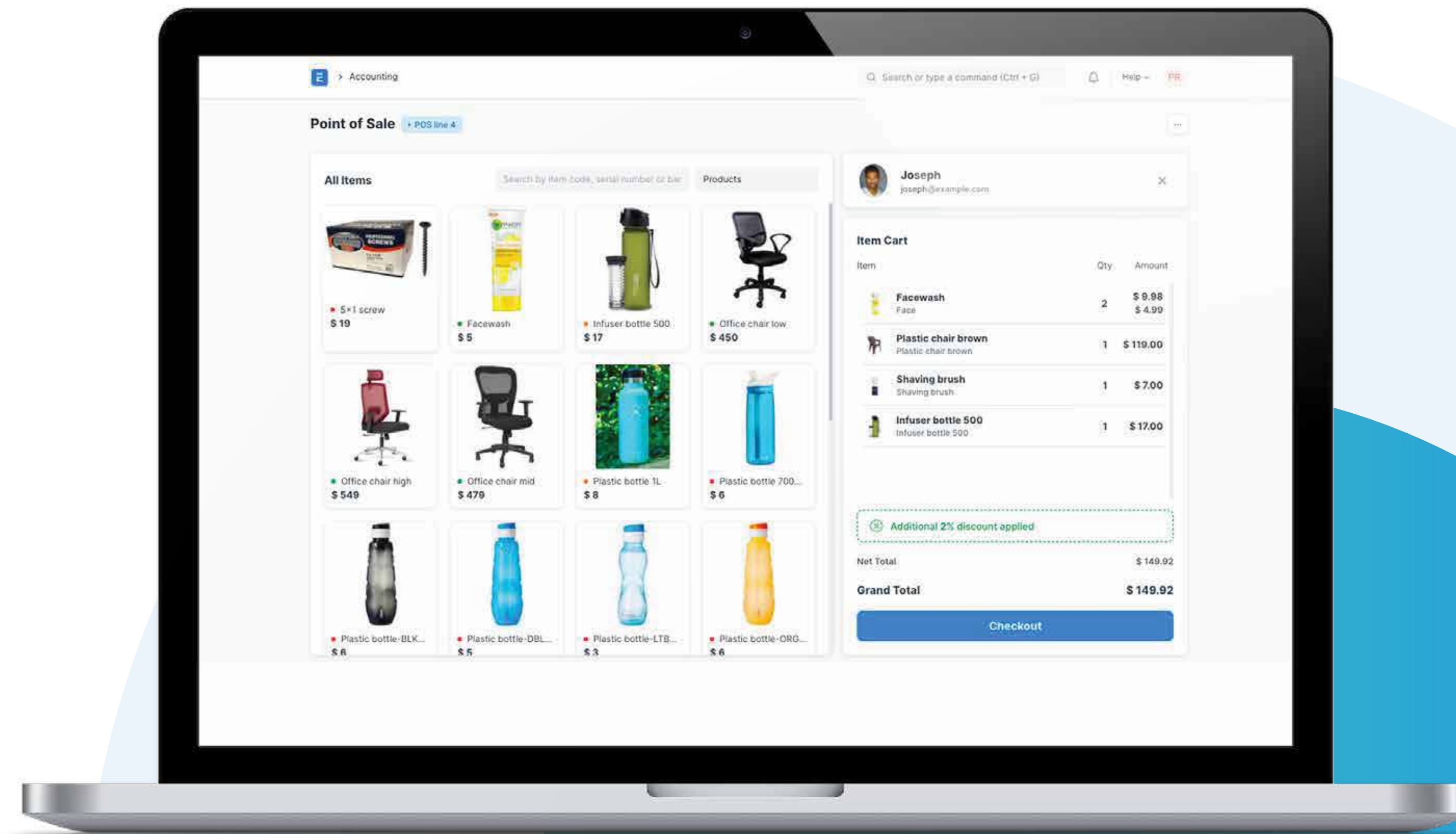
Designed for both, simplicity and power

DASHBOARD



BOT Solutions

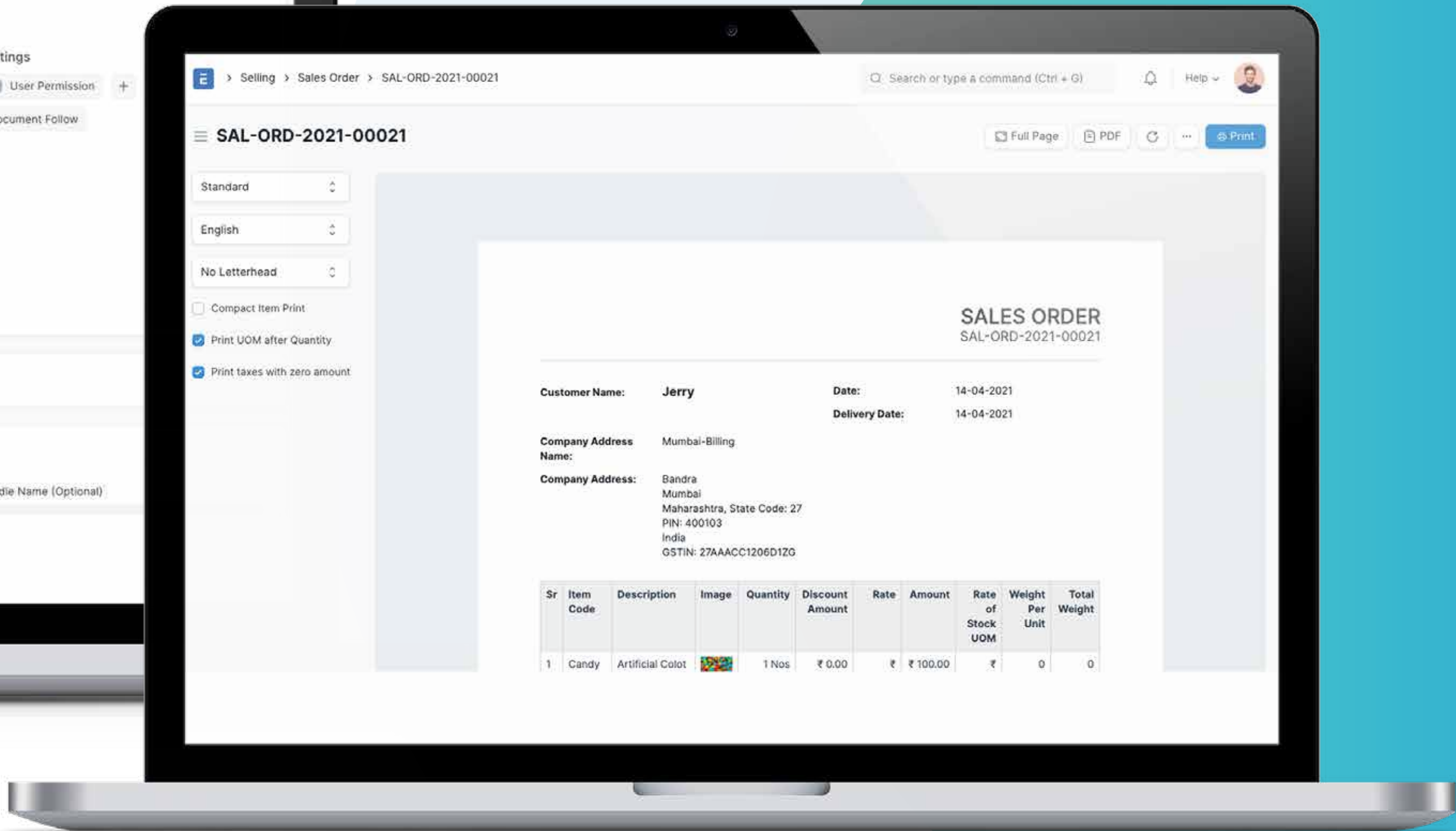
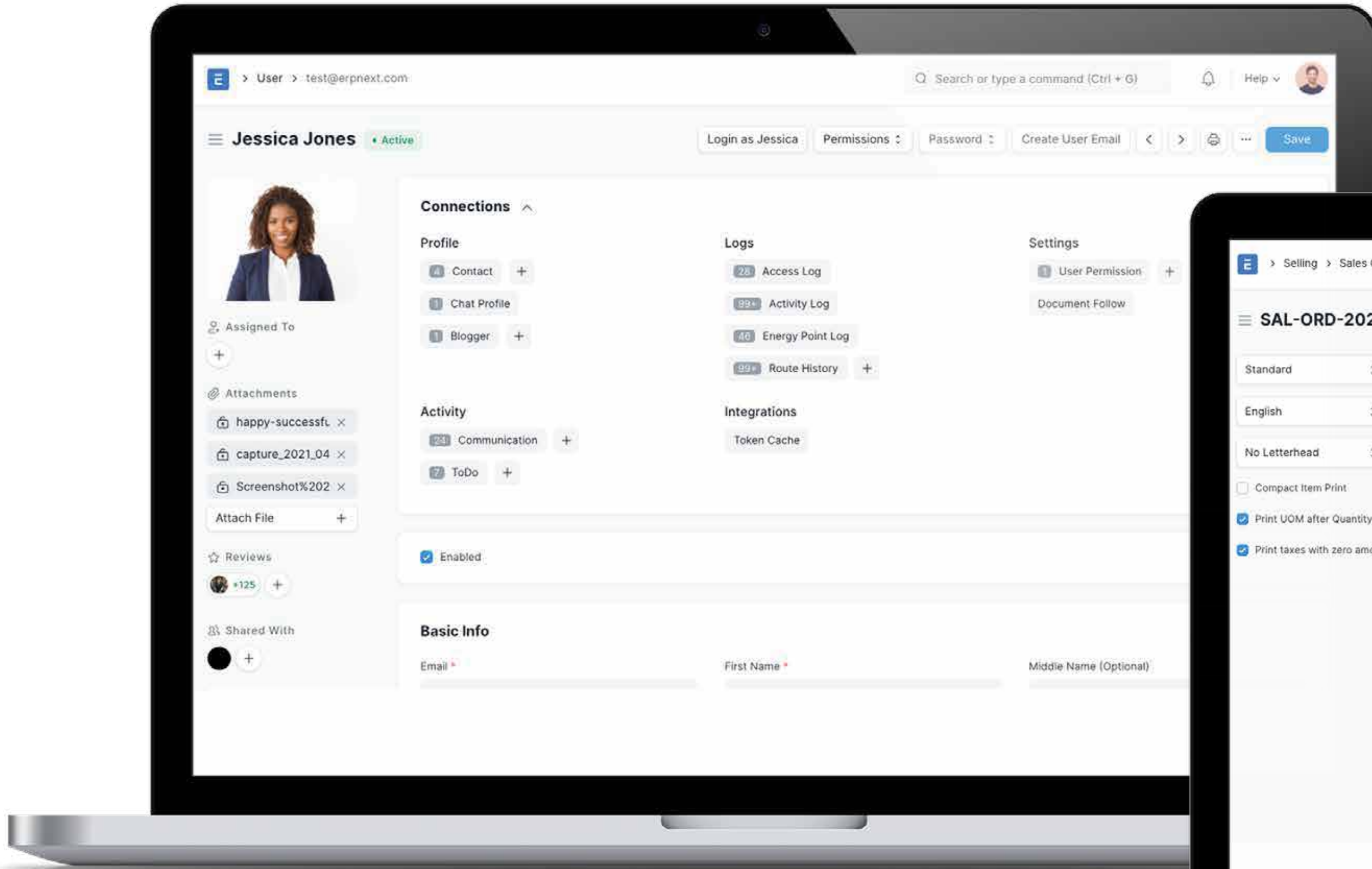
POINT OF SALE



USER MANAGEMENT



ORDERS

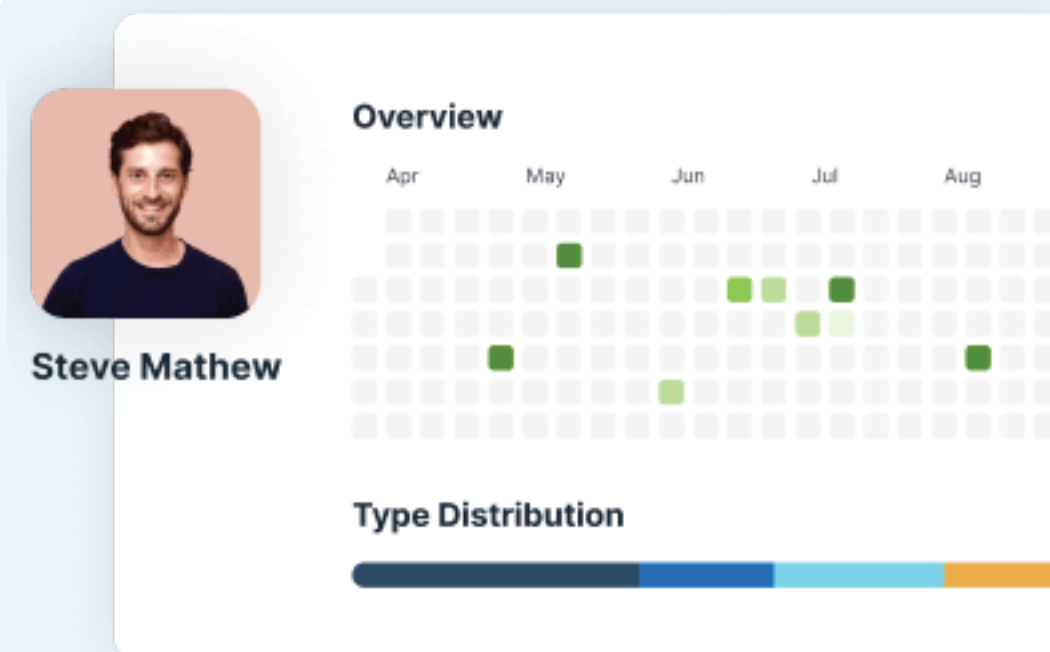
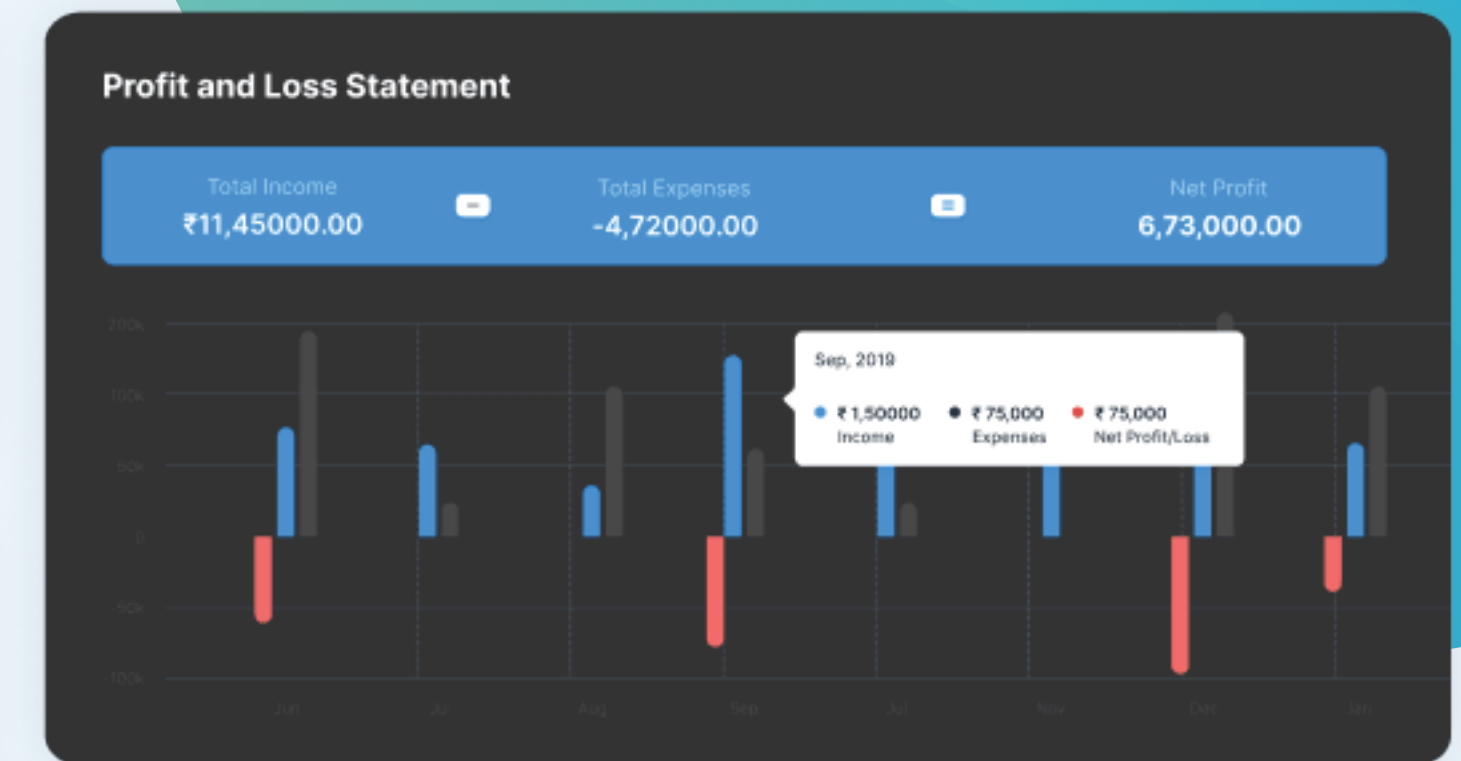
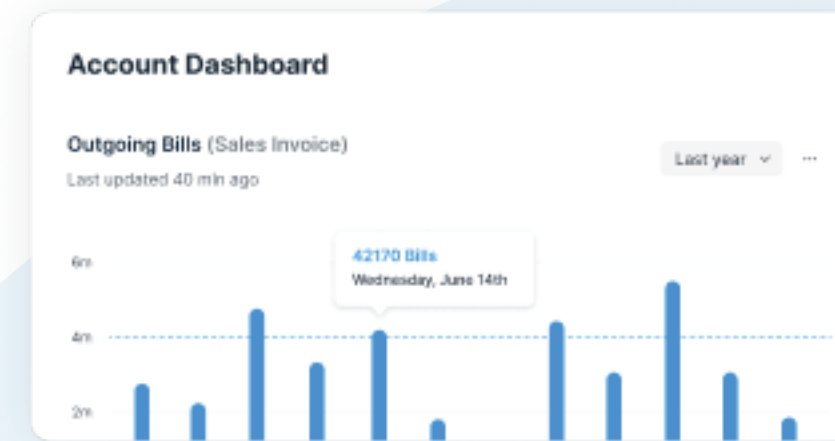




ALMOST EVERYTHING YOU NEED

ERPNext comes with 1000+ objects to help you run your business

- Financial Accounting
- Order Management
- HR & Payroll
- Manufacturing
- CRM
- Projects
- Help Desk
- Asset Management
- Website



Financial Accounting

Manage your finances with the 100% open source accounting software

All the tools you need to manage cash flow in one place, right from recording transactions to summarizing and analyzing financial reports. It's bookkeeping made easy.

Trusted by Companies Worldwide



Real-time view of your accounting books

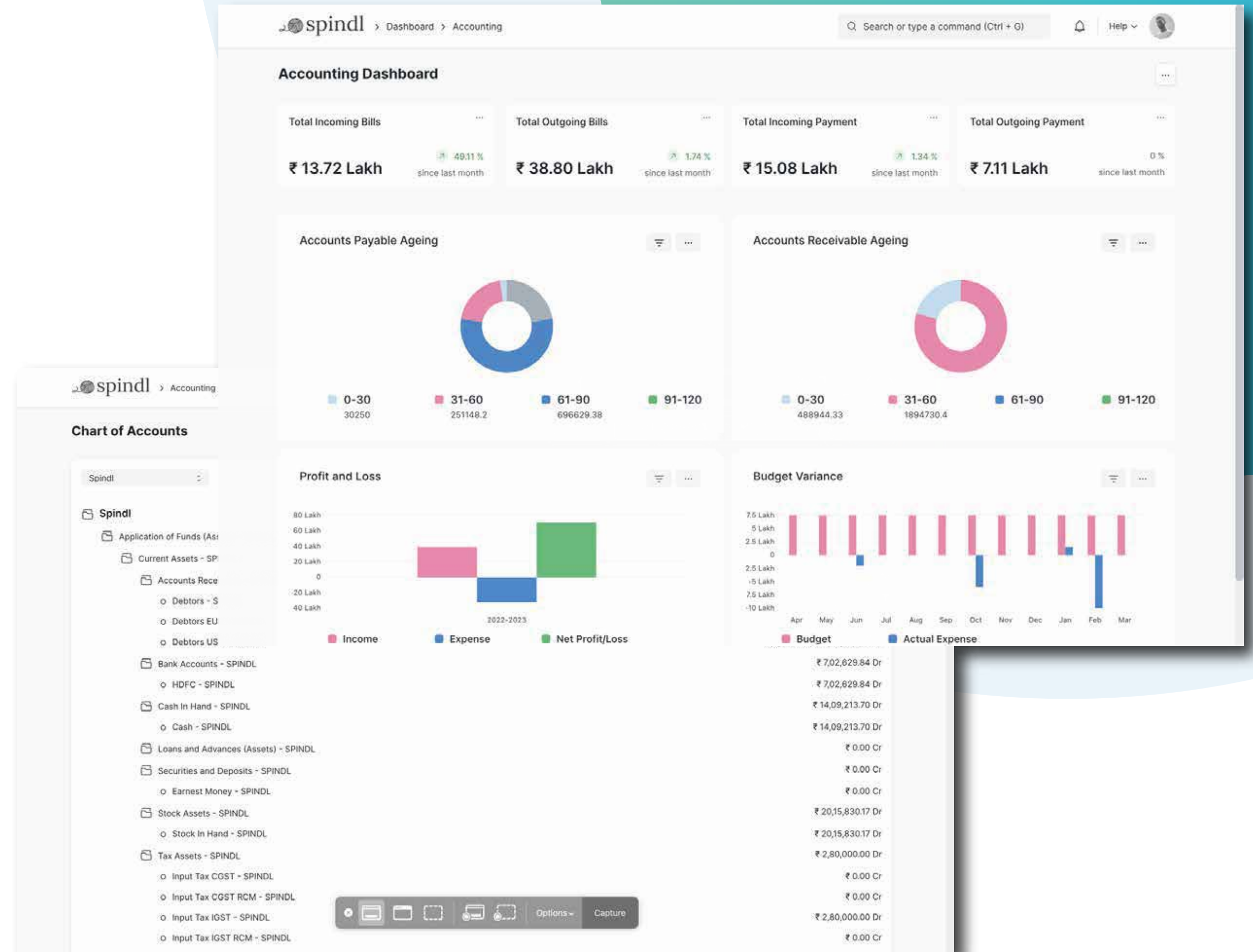
1 Open source accounting dashboards highlight all key performance indicators at a glance. With configurable accounting dimensions and customizable dashboards, it's finally possible to analyze every component of your business in one place.

Chart of accounts

2 The Chart of accounts — a configurable tree view for structuring accounting ledgers as desired — is the blueprint of your company. Ledgers act as leaf nodes, while groups can have sub-groups and ledgers within them.

Journals and payments

3 Maintain a clean and crisp ledger to avoid mismatches when closing accounts. Track income and expenses (deferred or accrued), set up notifications for period closing, and control cash flow. Advance payments can be recorded and reconciled in one go.



4

Billing and pricing

Invoice your customers and chase receivable payments easily, with payment requests and notifications via email or SMS reminders. Create custom print templates for bills and set up defaults in no time. Item pricing just needs to be configured once, then it will be auto-fetched in all future transactions.

5

Multi-currency accounting

Managing transactions in different currencies is simple with our open source accounting software. Send invoices and add expenses in any currency, and let the system convert them to your base currency. You can even see financial transactions and reports in multiple currencies.

6

Auto-invoicing

Don't waste time sending renewal invoices every month. Use the Subscriptions feature to get invoices auto-generated for subscription orders.

7

Banking

Create unlimited bank and cash accounts, and track their opening and current balances. Maintain bank accounts for your suppliers and customers. Ensure that your financials are synchronized with one-click bank-statement upload. It's clearance made easy, and accounting made easier.

8

On-The-Fly Customizations

Create your own open source accounting software. Map the data you care about by adding custom fields in your forms. Then customize form behavior by auto-fetching values, hide fields based on user roles, and create custom print formats — all without a single line of code.

9

Multilingual Open Source Accounting Software

Can't find your language? Help us translate

Reinvent Sales And Supply Chain With An Open Source Sales & Purchase Tool

Track inventory levels, replenish stock, and manage sales orders, customers, suppliers, shipments, deliverables, and order fulfillment — all in one open source sales & purchase ERP.

Real-Time View Of Your Sales & Purchases

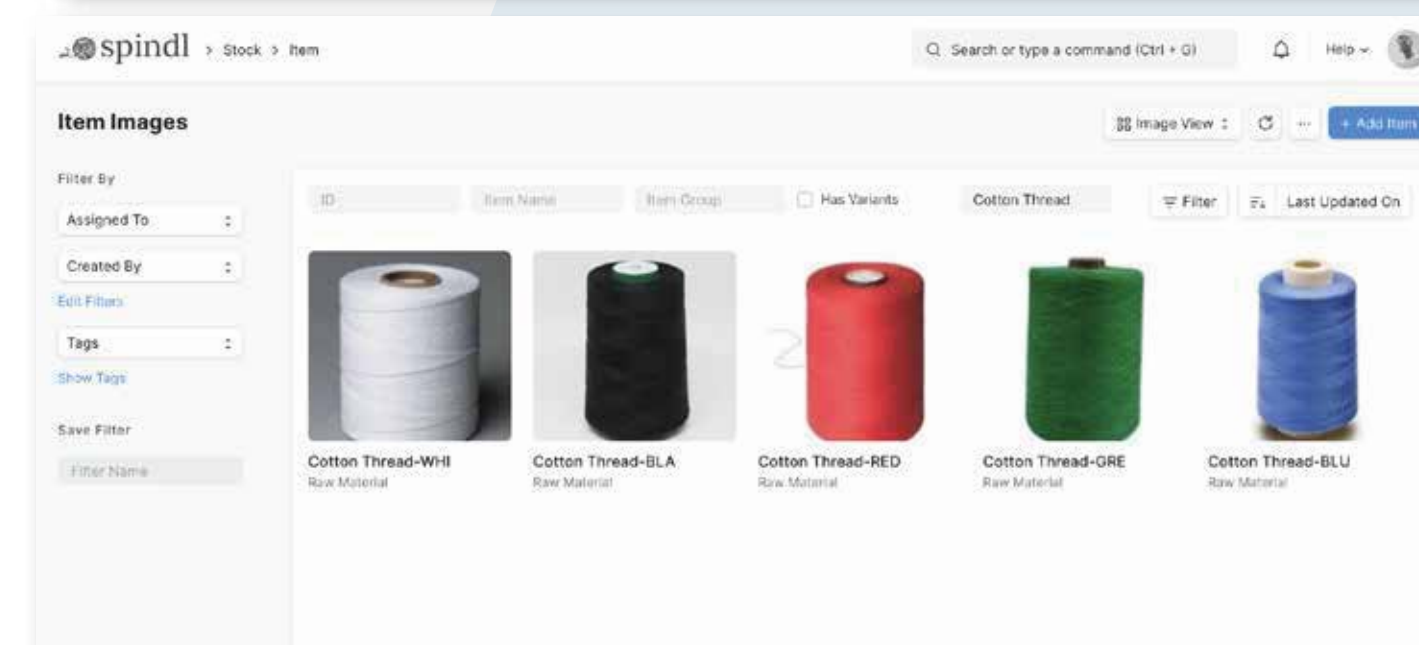
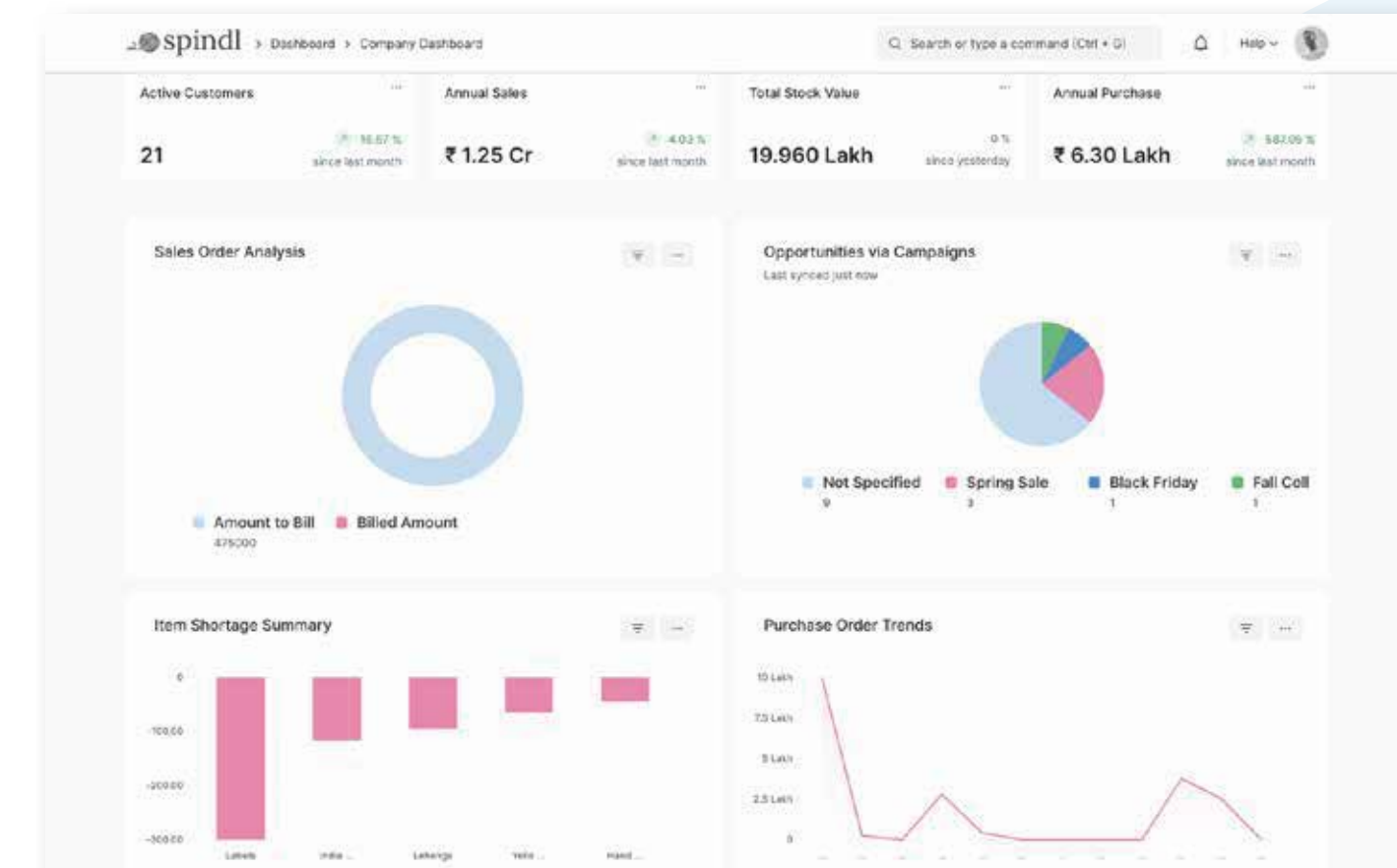
1 ERPNext brings all critical sales and purchase data to one place. Dashboards provide an at-a-glance view of key performance indicators relevant to business processes. With configurable accounting dimensions and customizable dashboards, it's finally possible to analyze every component of your business in one place.

Item Variants

2 Businesses have to manage thousands of product permutations in different colors, finishes, shapes and sizes. In ERPNext, the primary item is stored as an item template, and each of the variations is stored as an item variant.

Track Serial Numbers

3 ERPNext's Serialized Inventory feature comes in handy for maintaining a real-time view of product availability and stock across locations. You can even use a serial number to track the whole lifecycle of an item — from its procurement or manufacture to sale and delivery. Scan barcodes with your device camera for blazing fast search and quicker results.



Manage Lots

4 Batched items can be easily managed with ERPNext's integrated inventory – maintain manufacturing dates and expiration dates, analyze item expirations, and so on. You can also set up automatic batch naming so that all your team has to worry about is procurements and sales, not maintaining batch IDs.

Multi-Channel Sales

5 Be it Shopify, WooCommerce or Amazon MWS, it's easily to integrate ERPNext's items, customers, and sales orders with third-party sales apps. It just takes a 4-click configuration to make sales smoother and your life easier.

Elegant Print Formats

6 First impressions matter. Beautify your quotations and keep documents flawless and consistent with custom print format templates (using HTML or Jinja templating) and one-time configuration.

Powerful Marketing Tools

7 Our open-source CRM tool makes your lead closure soar. Use email campaigns for targeted marketing, send bulk emails to your customers with beautiful newsletters, and reap the benefits of your campaigns with granular analysis of lead sources.

Journals And Payments

8 Maintain a clean and crisp ledger to avoid mismatches when closing accounts. Track income and expenses (deferred or accrued), set up notifications for period closing, and control cash flow. Advance payments can be recorded and reconciled in one go.

Accounts Receivable

9 Track the balance that customers owe you towards the sales invoices you have already sent to them. You can import your existing accounts receivables details using the Opening Invoice Creation tool.

Customer Access

10 If you work with clients, you'll love ERPNext. Get everything on the record with your clients and your team. Using ERPNext, clients can not only view project status but also raise support issues, scan invoices billed, and so

Unified, Tracked Emails

11 Avoid stranding important emails by syncing your email accounts in ERPNext. With a unified trail of all correspondence and auto-replies for incoming emails, you can count on smooth communication with all stakeholders (be it the internal project team members or external



12 Documents Storage

Projects documentation can be complex, so it's important that everyone can access the files they need. ERPNext makes accessibility easy, with built-in uploading and sharing for multimedia files (such as images, videos, documents). You can choose to upload files directly or use a web link.

13 Stock Replenishment

To prevent stockouts, track an item's reorder level. When the stock level goes below the reorder level, ERPNext will automatically create a material request. This helps you replenish inventory at exactly the right time and reduce chances of stock exhaustion.

14 Promotional Schemes

Introduced for large-scale retailers and distributors, managing discounts or margins based on rate or amount was never easier. With promotional schemes, you can manage item discounts for different parties or conditions. Promotional schemes will automatically change the applicable pricing rules.

15 Vendor Management

ERPNext includes options to warn about RFQs & POs or prevent RFQs & POs. Your supplier's currency can be different from your company currency, and our software will handle all exchange rates and conversions.

Supplier Portal

16

Use the supplier portal to help suppliers manage themselves. The suppliers can submit requests for quotations and automatic supplier quotations, or access ongoing purchase orders and receipts. Suppliers can also raise purchase invoices for fulfilled orders. You can then verify these invoices for final approval.

17 Accounts Payable

17

See how much you owe your suppliers and track due dates or payment aging on the Accounts Payable report. Once you pay an invoice, just post a payment entry. You can even import all your existing invoices using the Opening Invoice Creation Tool.

18 Automated Invoicing

18

Don't waste time sending renewal invoices every month. Use the Subscriptions feature to get invoices auto-generated for subscription orders.

19 On-The-Fly Customizations

19

Create your own open source sales & purchase software. Map your most important data by adding custom fields in your forms. Customize form behavior by auto-fetching values, hide fields based on user roles,

20 Self-Onboarding & Implementation

20

All the tools you need to achieve business excellence are part of the world's first smart, DIY ERP. Transform your organization with excellent documentation and video tutorials that facilitate a zero-touch, super fast ERP implementation.

HR & Payroll

Open Source HRMS and Payroll Software for your growing business

ERPNext makes it easy and efficient to recruit and manage employees and attendance, track leaves and expenses, and handle onboarding, training and appraisals. Process payroll painlessly with configurable salary structures and personalized payslips.

Talent Acquisition

1

Recruit and acquire talent intelligently. Manage hiring with an built-in recruitment tool that lets you plan manpower requirements, publish job openings on your website, review and email applicants, and store documents. With linked data between staffing plans and job openings, we'll make sure you don't exceed your HR budget.

Employee Repository

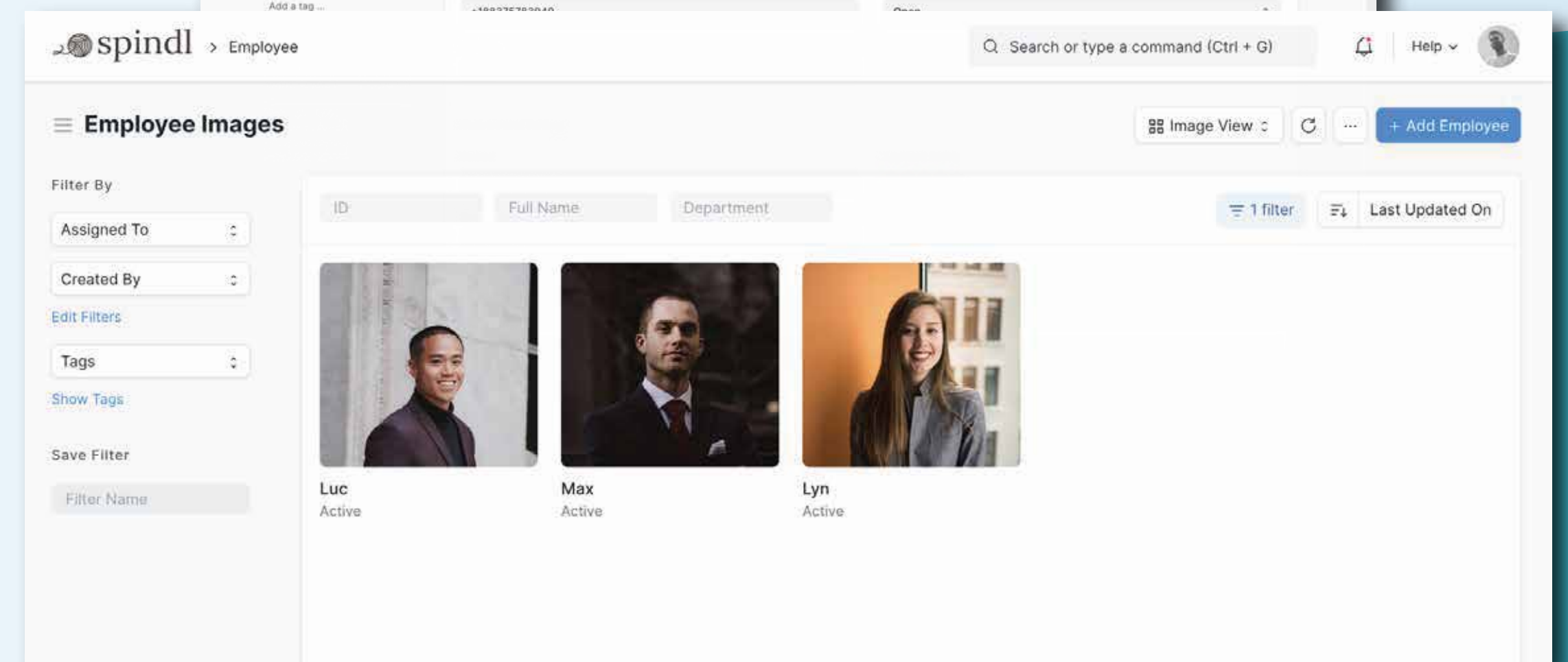
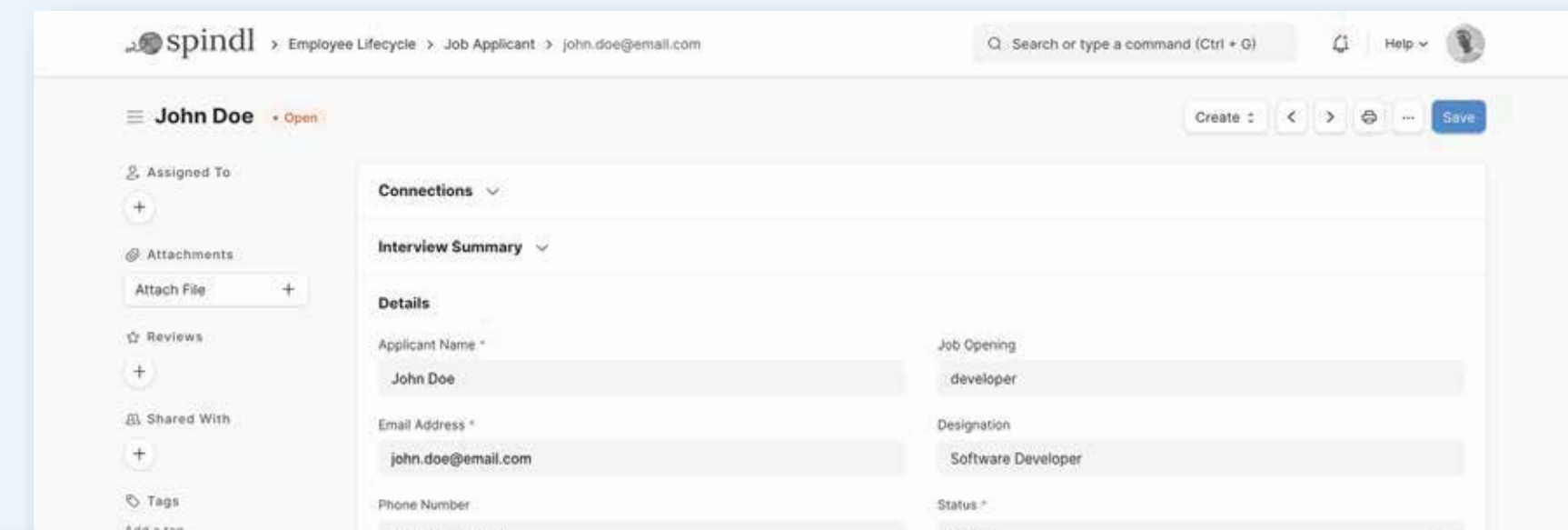
2

Managing employee information can be complex and tricky, since it requires tracking external documents. ERPNext lets you upload and share multimedia files (such as images, videos, documents). You can choose to upload the files directly or use a web link.

Employee Training

3

Keep upskilling your team with our Human Resource Training Program module. Schedule training events for your employees, which are automatically linked to employee calendars so everyone can view scheduled trainings and plan their to-do lists accordingly.



4

Key Performance Indicators

Track employee performance maverick-style and redefine team excellence on our Energy Points system. With a built-in appraisal module and dashboard of essential HR KPIs, you can keep an eye on employees' journeys and process salary hikes and bonus for top performers.

5

Expense Management

Manage expenses, travel requests, and employee advances efficiently with our open source HRMS & payroll software. ERPNext helps managers to see all employee expenses in one go. Easy approvals and out-of-the-box configurable workflows help save the manual effort of managing expense claims.

6

Automatic Attendance

Our open source HRMS tool flawlessly integrates attendance tracking with payroll and leave management. ERPNext includes multiple options for capturing real-time attendance, including biometric hardware integration.

7

Leave Management

Configure leave management options for each department or business unit. Just input weekends, set the number of working hours, grant permission to transfer leaves and more, all within a few clicks. Everything will show up in the leave calendar and centralized leave summary ledgers, which give a transparent view of all employee leave information.

8

Personalized Payslips

With ERPNext's easy customization capabilities, you can create print formats with your branding to get that personalized feel. Include your organization's letterhead, configure the format of salary components, or get a classy, professional look by including information like date of payment and pay period.

9

Payroll Period & Tax Slabs

Define the period for payroll processing (financial year or monthly, it's your call) and set tax salary slabs for employees. You can also add multiple tax slabs for a payroll period depending on your country's tax regulations.

10

Configurable Salary Structures

Use different salary structures to reward high-performing or high-ranked employees. You can set different calculations for each salary structure, based on configurable components, earnings and deductions. Assign each employee or department to the right salary structure, then process payroll and watch salary slips get generated automatically.

11

Payroll Entry

Leave behind the pain of generating individual salary slips and embrace effortless payroll processing. ERPNext has automatic payslip generation based on time sheets (with automatic validation), salary components, and salary structures.

12

Validate Attendance

Remote working is a hot trend these days, but if you're more old school, you can verify employee attendance with our smart payroll software. It just takes one click to generate salary slips based on total present days, leave without pay, half days, and so on.

13

Verify Time Sheets

Sometimes an employee's salary is based on the number of hours they worked for on a specific project. If these hours are tracked via time sheets, you can ensure the payroll entry bills these extra hours in the salary slip automatically.

Manufacturing

Move beyond legacy tools with a smart cloud manufacturing ERP software

An open source, modern cloud manufacturing ERP software that simplifies the production cycle, helps track material consumption, exhibits capacity planning, handles subcontracting, and more!

Total control over your production

1

Integrate your production planning and shop floor. ERPNext's customer management, sales orders, inventory, purchasing, accounting, and financial reporting make real-time coordination across all your business verticals easier.

Bill of material (BOM)

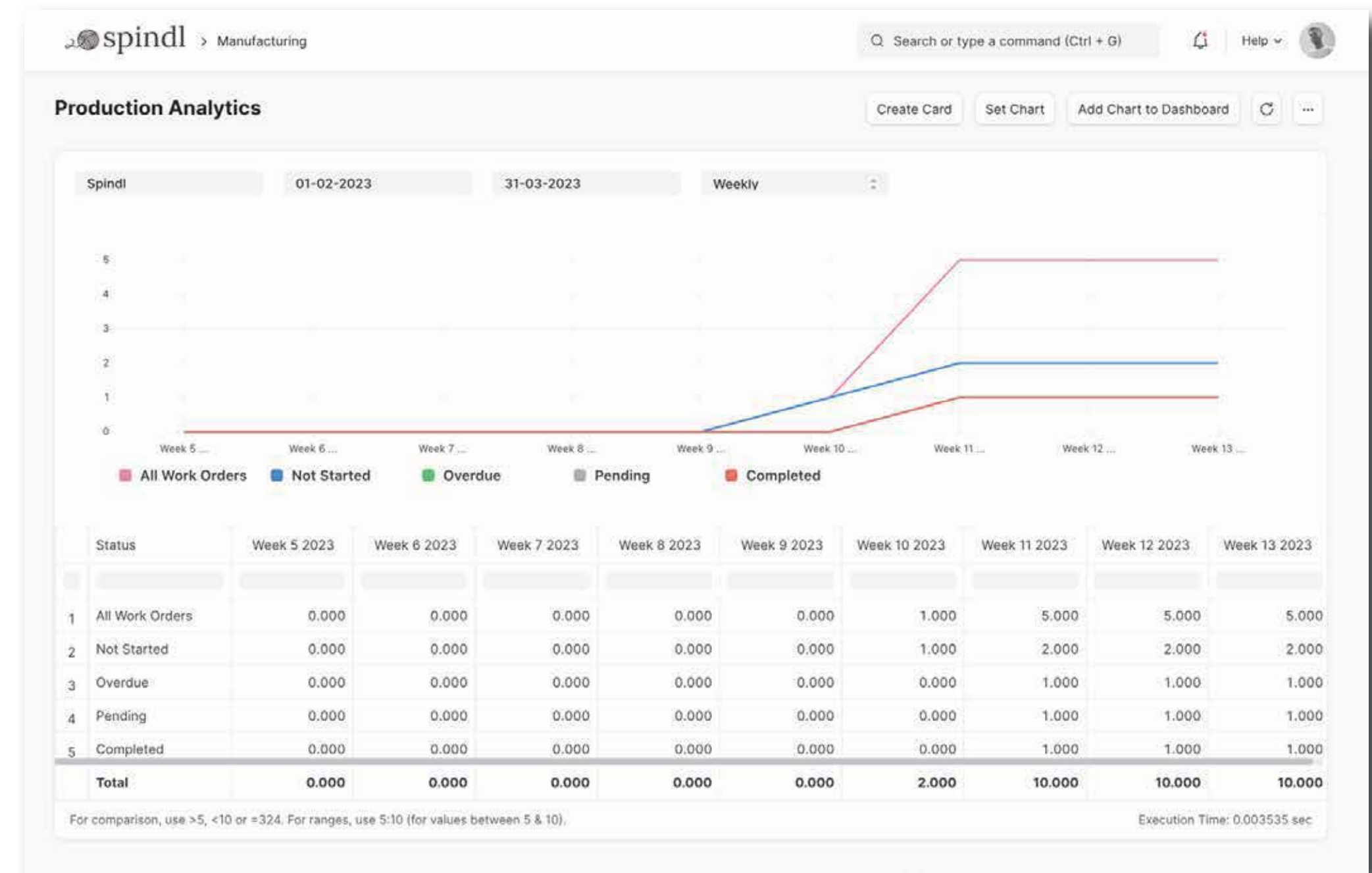
2

A bill of material is at the heart of any cloud manufacturing software, and a well-defined BOM ensures robustness and accuracy. ERPNext's BOM is hierarchical, with the finished product at the top. It also includes product codes, part descriptions, quantities, costs and additional specifications.

Shop floor management

3

With ERPNext's job cards, operations and workstations features, you can automatically capture daily activities on your shop floor. View real-time status of the job work being done to manufacture products, the location of every workstation, employee assignments, and each work order's current status and pending steps – all in one screen.



4

Subcontracting

Does your business involve outsourcing processes to a supplier? Check out the subcontracting feature in ERPNext. It makes it easy to supply raw materials and track suppliers' labor and operations. Finished goods are valued based on the cost of raw materials and procured services.

5

Item variants

Suppose you produce t-shirts in different sizes and colors. You'll need to track each type of t-shirt and its variants, known as item variants. In ERPNext, the primary item is stored as an item template, and each of the variations is stored as an item variant. You can store any attribute, such as color or shape, for each item variant.

6

Batched inventory

With ERPNext's integrated inventory, managing batched items is simple. Its real-time view of product availability maintains each batch's manufacturing dates, expiration dates, and other details. You can even scan item barcodes with your device camera to quickly search through your stock and make data-driven decisions.

7

Serialized inventory

Use serial numbers to uniquely identify units. Set up naming series, and ERPNext will automatically create serial numbers for new stock. You can even scan item barcodes via your device camera for easy search through all your stock.

8

Material resource planning

Be it a work order against sales or material requests, ERPNext will show every aspect of your MRP. Track material consumption of serialized or batched inventory to curb expenses and achieve zero wasted resources.

9

Capacity planning

Optimize your workstations based on the resources available for open production orders. Identify and eliminate bottlenecks at the shop-floor level by creating a capacity plan. You can also maintain and manage planning schedules for a predefined period of time (30 days, 45 days, 60 days).

10

Multiple units of measure

Don't let systems stop you from measuring materials exactly the way you want! Keep track of different units of measurement for your inventory. Set up conversion factors in the Item master itself and facilitate smooth sales, purchase, and stock transactions. All conversions will be handled by the system.

11

Quick stock balance

With the quick stock balance report, you can perform stock audits to verify stock at the warehouse, and check it against stock logged in the system. Simply scan a barcode with any device (no barcode scanner required!) and start counting.

12

Stock replenishment

To prevent stockouts, track an item's reorder level. When the stock level goes below the reorder level, ERPNext will automatically create a material request. This helps you replenish inventory at exactly the right time and reduce chances of stock exhaustion.

13

On-the-fly customizations

Create your own custom cloud manufacturing ERP software. Map your most important data by adding custom fields in your forms. Customize form behavior by auto-fetching values, hide fields based on user roles, and create custom print formats — all without a single line of code.

CRM



Close sales faster with the World's Best Open Source CRM

ERPNext is the best tool for doing more in less time. Get leads, drive sales, automate mundane tasks and connect with your prospects, and grow your business — all with the real customer-centric CRM.

Omnichannel Interactions

- 1** Don't miss out on anything from your leads. ERPNext makes it easy to convert all interactions into data so your sales team doesn't have to juggle between apps. With Call Popup, you can receive live notifications of incoming calls on your desktop. You can also turn emails in your inbox into leads with this open source CRM software.

Automate Daily Chores

- 2** Reduce overhead of manual work by setting up assignment rules (such as round robin or load balancing) to automatically distribute leads among the team. This leaves more time to respond to customers, empowering your sales team to meet commitments on time.

Sales Team Efficiency

- 3** Don't miss out on the big picture of your sales team. ERPNext includes out-of-the-box reports to monitor team performance and analyze the lead traffic or sales stage of all prospects. You can even collaborate to address leads or opportunities with multiple assignments or mentions.

Crisp, Beautiful Quotations

- 4** First impressions matter. Beautify your quotations and keep documents consistent with custom print format templates (using HTML or Jinja templating) and one-time configurations.

Digital Marketing

- 5** Our open-source CRM tool makes your lead closure soar. Use email campaigns for targeted marketing, send bulk emails to your customers with beautiful newsletters, and reap the benefits of your campaigns with granular analysis of lead sources.

On-The-Fly Customizations

- 6** Create your own open source CRM software. Map your most important data by adding custom fields in your forms. Customize form behavior by auto-fetching values, hide fields based on user roles, and create custom print formats — all without a single line of code.

Projects

Upgrade your work style with an Open Source Project Management Software

Organize, schedule, plan and analyze projects with a task-driven approach that will streamline team collaboration and accelerate your work.

All-In-One Workspace

1

Keep track of project deadlines and progress with a clear overview. Plan ahead for upcoming projects, using forecasts based on comparable projects, and estimate deadlines more accurately.

Agile

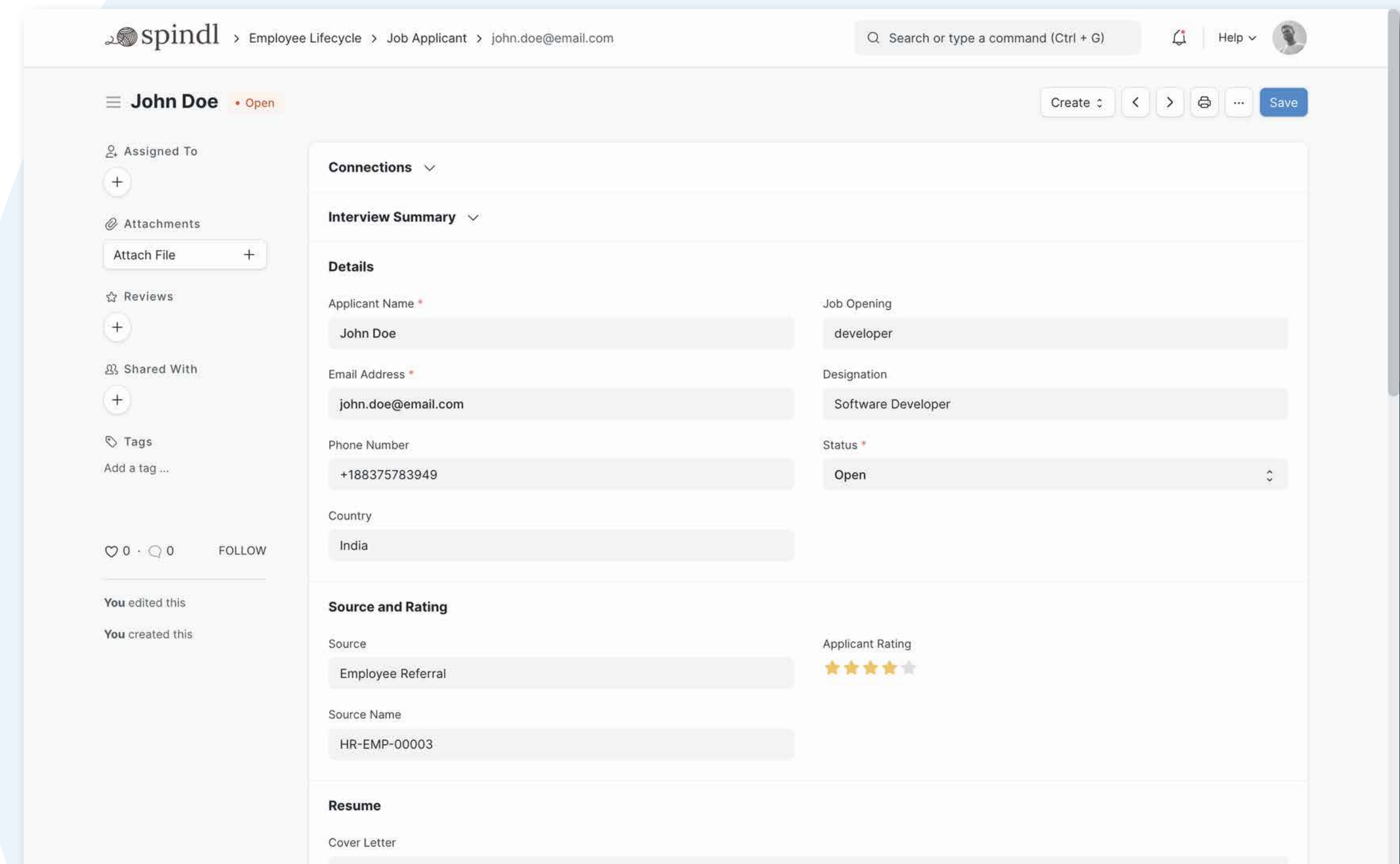
2

Discover the task-driven approach to simplifying your projects. With minimal communication gaps and full transparency, ERPNext makes it easier to share and collaborate across the entire project team. Break down your project into bite-sized tasks and assign them to your team for improved collaboration. Assess project progress and efficiency with clear scope and priorities, estimated timelines, and milestones.

To-Do List & Real-Time Chat

3

Make work life easier with this simple, flexible project management software. Create and assign tasks to your employees. The system will automatically add the tasks in their to-dos to keep assignments and task-tracking hassle-free. And with mentions and real-time chat, there's no need to bring external chats into internal communication.



4

Document Storage

Managing projects and all their documents can be tricky, and it's crucial that everyone can access important files. ERPNext lets you upload and share multimedia files (such as images, videos, documents). You can choose to upload the files directly or use a web link.

5

Emails

Avoid stranding important emails by syncing your email accounts in ERPNext. With a unified trail of all correspondence and auto-replies for incoming emails, you can count on smooth communication with all stakeholders (be it the internal project team members or external clients).

6

Profitability Analysis

Stay on top of project budgets and expenses with accurate, current insights. Plan the cost for each project phase, allocate budgets against projects, and see how much of your allocated budget has been spent — all at a glance.

7

Time-Tracking & Billing

Simplify tracking by defining actionable items — the activities for projects and tasks, based on what needs to be done. Capture resource costs and billing to get insights on project profitability. Directly link work to payroll to process salaries instantly.

8

Customer Access

If you work with clients, you'll love ERPNext. Get everything on the record with your clients and your team. Using ERPNext, clients can not only view project status but also raise support issues, scan invoices billed, and so on. You can also use it for announcements as well! Give your customers a full-fledged, flawless experience while they await the delivery of your services.

9

On-The-Fly Customizations

Create your own open source project management software. Map your most important data by adding custom fields in your forms. Customize form behavior by auto-fetching values, hide fields based on user roles, and create custom print formats all without a single line of code.

Raise customer service to the next level with an open source SaaS help desk

Reinvent your SaaS help desk today. ERPNext has everything you need to refine your customer support in one place – ticket management across multiple channels, process automation, SLA tracking, reporting and more.

Trusted by Companies Worldwide



Level Up With Real-Time Insights

1

ERPNext includes configurable dashboards to help you streamline service issues. Real-time insights help you identify bottlenecks and implement best practices faster in your SaaS help desk.

Omnichannel Interactions

2

Don't miss support calls from your customers. ERPNext makes it easy to convert all interactions into data so your support team doesn't have to juggle between apps. With Call Popup, you can receive live notifications of incoming calls on your desktop. You can also turn emails in your inbox into tickets with this open source SaaS help desk software.

Automate Ticket Assignments

3

Reduce overhead of manual work by setting up assignment rules (such as round robin or load balancing) to automatically assign tickets among the team. This leaves more time to respond to customers, empowering your SaaS help desk to meet commitments on time.

4

Team Excellence

Collaborate to address support tickets with multiple assignments or mentions. ERPNext includes out-of-the-box reports to monitor the performance of your support team and analyze ticket traffic (including open and closed tickets).

Service Level Agreement

Personalize your customer experience with SLAs (for your support policy, response and resolution times, etc) based on the expectations you set with customers. You can track fulfillment or failures to improve your support process.

5

Customer Portal

Level up your customers' interaction with your system and boost customer experience. Your clients can track the status of their issues and your team's correspondence in ERPNext's Issue Portal. Just invite customers as users in your ERPNext account and let them reap the benefits of full transparency – opening sales orders, tracking shipments via delivery note status, raising issue tickets, and tracking resolution details.

6

Knowledge Base

Reduce ticket load by creating crisp help articles and FAQs, so that your service team can work on the complex issues that need their attention. This not only expands your knowledge base, but also empowers your customers to find solutions without having to wait for an agent.

7

Asset Management

Effortless asset maintenance with #1 Open Source Asset Management Software

ERPNext makes asset management painless — from purchase to perishment, IT infrastructure to equipment. Cover every branch of your organization, all in one centralized system. Use ample features jam-packed in a single tool to manage assets better.

Asset Lifecycle

- 1 Look here for all information about assets in one place. Created after purchasing or receiving an asset, the asset lifecycle includes every answer you might need — status of an asset, custodian, location, warranty and insurance, depreciation and depreciation schedule, asset transfer, scraping, selling and movements, and more. It's transparent and crystal clear — like all things should be.

Asset Inventory

- 2 ERPNext features integrated inventory so you can easily manage all information about an asset. Batched or serialized items? Take your pick. Scan barcodes with your device camera for blazing fast search, faster outputs, and data-driven decisions based on assets' availability, locations, and more. When an asset is purchased, the system auto-creates the asset record based on the information stored in the item master.

Purchasing Assets

- 3 Procuring assets is done via purchase receipts (goods received notes) or purchase invoices. The system directly creates a record for the asset, based on the information stored in the item master. Depreciation methods, schedule, insurance details and more can be updated with a few clicks. It's asset procurement simplified with one-time configuration.

Selling Assets

- 4 With a few clicks, you can sell assets that you no longer need. There is no overhead of maintaining accounting books, since the system will auto-create those journal entries, keeping the process quick and seamless.

Automating Asset Depreciation

- 5 Automated asset accounting removes the hassle of manual depreciation entries. Configure depreciation schedules for various categories of assets, and watch the software auto-calculate the depreciation amount or dates and create accounting entries.

Scrapping Assets

- 6 Create your own open source CRM software. Map your most important data by adding custom fields in your forms. Customize form behavior by auto-fetching values, hide fields based on user roles, and create custom print formats — all without a single line of code.

Asset Value Adjustment

- 7 If the value of an asset increases or drops off suddenly, it can be recorded using the Asset Value Adjustment feature. The system will create journal entries (based on the re-adjustment values that were entered) and recalculate depreciation amounts.

Website



Build Stunning Websites With The World's #1 Open Source Website Builder

A platform that gives you the freedom to create, design, manage and develop your web presence exactly the way you want in minutes.

Your Website At Its Best

Responsive Websites

1 ERPNext is the mobile-friendly website software. Manage the layout of your website with Bootstrap 4's cutting edge technology. Customize your website's appearance and layout for any screen size. The responsive website builder provides the optimal experience for a wide range of devices — mobiles, tablets and computers.

Search Engine Optimization

2 It's crucial that your website ranks highly for the keywords your prospects are searching for. Enhance the visibility of your products and offerings by optimizing your site's SEO and maximizing social promotion. Don't lose business anymore — expand your reach and engage audiences in minutes.

Blogging

3 Whether it's for your business or yourself, a good blog can help position your brand as an industry leader and establish stronger ties with customers. Responding to comments and questions on your blog can reveal what your customers like and what they're looking for — anything from feedback on your product to FAQs about your company. Create a stunning blog, grow your community, and share your ideas.

Ecommerce

4 Is ERPNext a website building software or an online store builder? Experience the power of two in one. Set up your online storefront any way you want — add beautiful product collections, product galleries, quick add-to-cart, shopping carts and more. Customize your product and cart pages to meet your business needs.

One-Click Web Forms

5 The Web Forms feature of ERPNext's website builder lets you create dynamic forms on your website. Use them to collect any information, such as your customers' addresses and contact details, or your employees' expense claims and leaves. It just takes a single click to reduce manual entry and automatically collect user information.

Website Chat

6 Capture the attention of your prospects as they browse your website by enabling website visitor chat. It's a one-time configuration that empowers you to log every visitor's chat, so you can analyze their business needs and close sales faster.

Social Login Keys

6 Social login speeds up the process of onboarding new users by letting them log into your website via their Google, Facebook or GitHub account. It's easy to set up — just a one-time configuration that will help you gain users easily. Social logins also help you to understand the quality of your