



# Introducing ERPNext

One Stack, 100% Freedom

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# Executive Summary

Today, most enterprise ERP systems are unnecessarily complex, expensive and ugly. Customers are paying high prices for proprietary products, just because they don't know about free, open source alternatives. These expensive products have been built on rigid, legacy platforms and deny customers the freedom that comes with an easily customizable platform. However, this is changing. 77% of enterprises are already adopting open-source technology because of the various benefits that come with it: freedom, empowerment, and transparency. This is where ERPNext comes into the picture.

ERPNext is a 100% open source cloud ERP that comes with all standard modules such as Accounting, CRM, Invoicing, HR, Payroll, and more. It also includes domain-specific features for the Manufacturing, Distribution, Education, and Service industries out-of-the-box. It can be customized on the fly with minimal clicks because of its metadata-driven framework. As it's open-source, you have full access to the code. You can extend ERPNext, amend it, alter it or accept it as it is, but you can't ignore it.

Frappe is the core maintainer and OEM of ERPNext. Open source has been the philosophy of the company from Day 1. ERPNext's code has always been published online, first on Google Code and then on GitHub. Along with its flagship ERP, Frappe has also introduced many open-source libraries and empowered the open source community. With its commitment to openness, Frappe is on a quest to liberate customers from expensive, licensed products worldwide.



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# 1. Industries

ERPNext is the world's best 100% open source cloud ERP



## 1.1 Overview

ERPNext is a full-featured business management solution that helps businesses of any size to record all their business transactions in one system. It is the single source of truth and serves as a unified platform for your business. With ERPNext, you can make informed, data-based, timely decisions and remain ahead of the competition. It serves as the backbone of a business, adding strength, transparency, and control to your growing enterprise.

Among other things, ERPNext will help you to:

1. Increase sales
2. Increase profit
3. Reduce inventory
4. Reduce receivables
5. Improve quality
6. Improve on-time delivery
7. Reduce follow up
8. Improve transparency
9. Improve accountability
10. Reduce waste

And a ton more.

Built on a modern technology stack and a sleek UI, ERPNext facilitates businesses of various industries. In ERPNext's etymology, we call these industries 'Domains'. You can leverage ERPNext for managing any type of industry, right from manufacturing and retail to services, healthcare and agriculture as well!

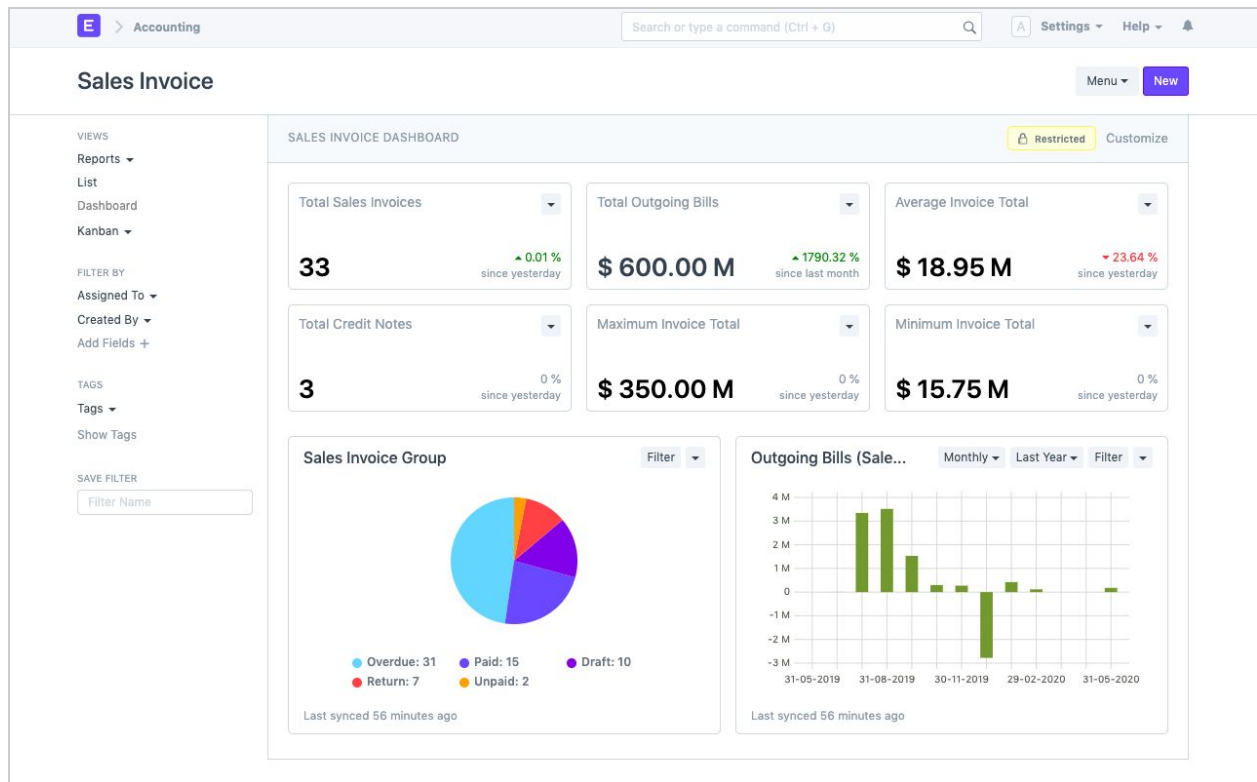


Figure 1: Dashboard of Sales Invoice in ERPNext



## 1.2 Industries

ERPNext has built in modules for many industries, right from manufacturing to healthcare.

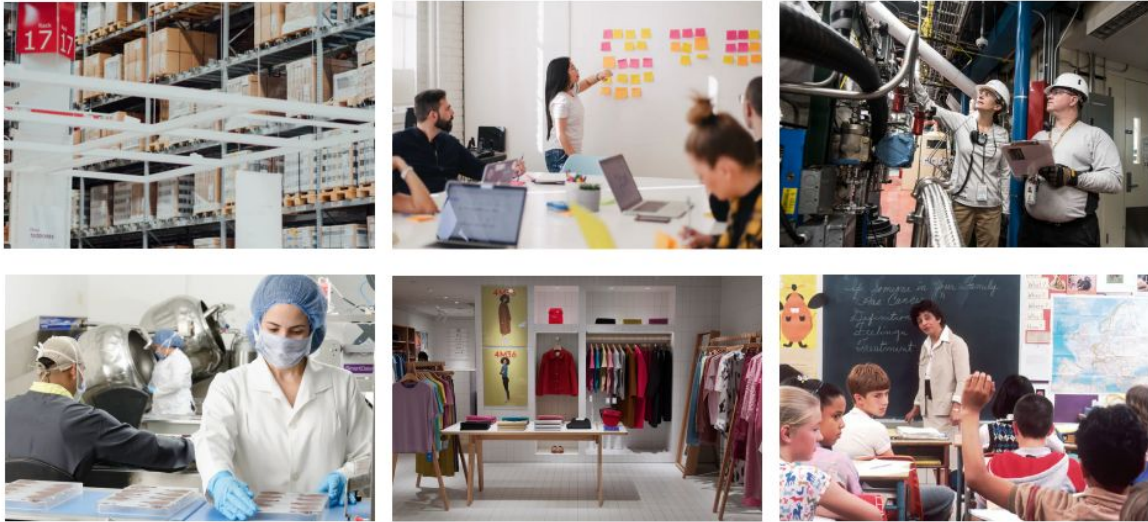


Figure 2: Industries

### 1.2.1 Manufacturing

Without solid control over your operational and financial processes, you run the risk of production mistakes, late deliveries and out-of-control costs that can hurt your margins. With support for a wide variety of manufacturing processes — including make-to-stock, make-to-order and engineer-to-order — you can enable a smart mechanism for tracking your production with ERPNext.

Features:

- Multi-level Bill of Material
- Shop-floor Management and Capacity Planning
- Inventory Management
- Automatic Material Request for Items



- Material Resource Planning
- Subcontracting
- Reporting and Dashboards

### 1.2.2 Distribution

Poorly integrated systems, reliance on manual processes, or re-keying data already available in one system but not accessible to others is always bad news. Streamlining distribution business is critical to avoid incorrect procurement of inventory or capital investment in the wrong products. Here's how ERPNext simplifies these challenges.

#### Features:

- Real-time view of inventory levels
- Managing multiple locations and warehouses
- Automating stock replenishment
- Tracking sales and fulfilment of customer orders
- Managing item variants
- Invoicing customers and suppliers
- Dropshipping

### 1.2.3 Retail

With increasing channels and ecommerce platforms, the retail ecosystem is gradually embracing new heights. Most of the legacy tools in the market lack flexibility, innovation and cannot be scaled easily as the business grows. ERPNext, being a robust and scalable solution, will help you streamline all aspects of your retail business aptly.

#### Features:

- Integrated inventory



- Warehouse management
- Point of sale (online and offline)
- Managing multiple price lists
- Managing cashier opening and closing vouchers
- Integrations with AmazonMWS, Shopify, and WooCommerce
- Can be used on mobile devices or tablets effortlessly

### 1.2.4 Services

While each service business may have its own unique challenges to overcome, a tightly integrated system will assure that you don't wear yourself down because of these challenges. Whether you're offering services for installation or consulting, spreadsheets can only take you so far. ERPNext serves as a unified platform for addressing scalability challenges with the Projects module, Customer Management, and Help Desk.

#### Features:

- Summary of ongoing projects via reports and dashboards
- Customer management and portal for customers to check the status of project
- Project templates for reusing when you have multiple projects of a similar kind
- Help desk to track issues, tickets raised, SLAs and more
- Maintenance and quality inspection

### 1.2.5 Healthcare

Common challenges that the healthcare industry faces are poor management of data, staying up to date with the increasingly complex science, failure to address consumer needs at the right time, and fraud or wastage of medicinal resources. ERPNext's Healthcare is a modern tool that will allow you to maintain all critical data at your fingertips so that you can access this information anytime and anywhere.



**Features:**

- Patient knowledge base with history of medication and ongoing treatments
- Managing healthcare practitioner schedule and appointments
- Mapping appointments for patients, clinical procedures, and lab tests data
- Medical code compliance as per statutory requirements
- Billing the patient for the treatments that are carried out

### **1.2.6 Education**

The primary challenge is developing a system that handles the complexities of the Education sector, ranging from information about degrees, programs and courses to students, their fees, attendance and tracking the lifecycle from the enrolment till graduation. Adoption of IT in this space is sparse, but it's increasing gradually. ERPNext offers the below features for educational institutions.

**Features:**

- Managing student applications via portal, admissions and enrollment for degrees
- Storing student information inside the ERP via document storage capabilities
- Managing student attendance, fees, course schedules, and assessments
- LMS (Learning Management System) to promote e-learning via videos or text
- Managing information of instructors, their expenses and payroll

### **1.2.7 Agriculture**

Large-scale agriculture and bulk production of a variety of crops is as complex as manufacturing, and it can greatly benefit from an ERP. ERPNext comes in handy, since it has many out-of-the-box features to help you manage your food production business better.





#### Features:

- Managing the analysis criteria for crop cultivation, and tracking crop cycles
- Repository for maintaining data about crops and livestock of each farm/field
- Preventive measures against diseases and information about fertilizers
- Analysis of plant, soil, water, soil texture and weather to check for any anomalies in cultivation
- Budgeting, costing and billing for crops that are produced and sold



## 2. ERPNext Modules

Whichever industry you do business in, ERPNext has out-of-the-box, ready-to-use modules for your work.



ERPNext helps you manage everything from accounting to customer deliverables, purchase and expenses, invoicing. These features can be used directly or [scaled](#) for larger deployments as per organizational requirements.

## 2.1 Accounting

Accounting is the heart of any business. Prior to computers and software, the company's transactions were maintained in a journal in date order, also called bookkeeping.

ERPNext's Accounting module follows the standard double-entry accounting system and lets you see a real-time view of your cash flow.

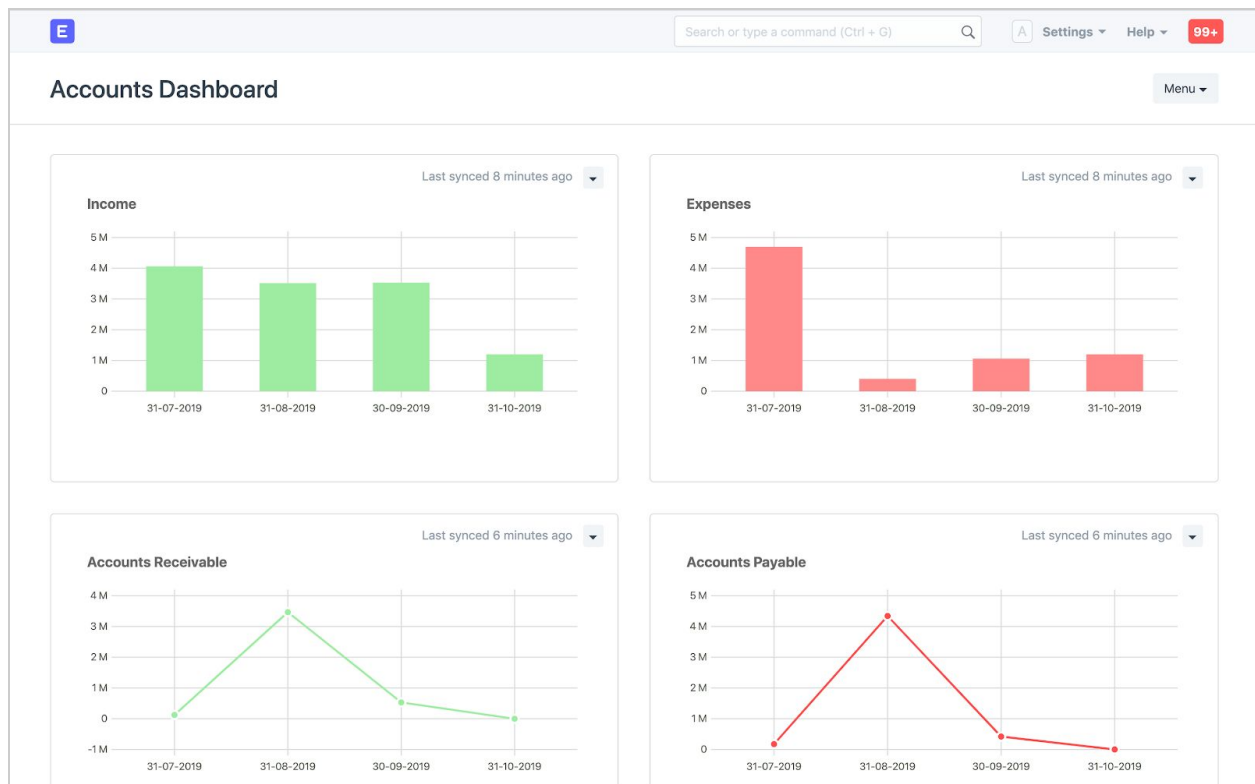


Figure 3: Accounts Dashboard in ERPNext

You will be able to:

- Create a configurable chart of accounts for managing accounting ledgers
- Record your transactions via journal entry or payment entry (multi-currency)
- Maintain cost centers and budgeting



- Bill your customers and send payment requests
- Reduce time spent on identical transactions by enabling auto-invoicing
- Link your bank statement and ensure that your financials are synchronized
- View consolidated financial statements if you have multiple companies

## 2.2 CRM and Selling

CRM is one of the smaller pieces of an ERP product, but it is an integral one. Managing customer data and engaging with customers is what keeps business running smoothly. You also need to stay ahead of your competitors by ensuring a flawless customer experience.

The screenshot shows the ERPNext interface with a print preview of a Sales Invoice. The breadcrumb trail is 'Accounting > Sales Invoice'. The invoice is for 'ABC Inc' with status 'Paid'. The invoice number is 'ETL-SINV-2019-00005'. The invoice is in 'English' and 'Letter Head' format. The customer details are: Customer Name: ABC Inc, Date: 25-06-2019, Address: A-901, Infiniti Space, Mumbai, Contact: Bobby, Mobile No: +91-456786677565. The invoice contains one item: 'Rent' with a quantity of 1, a rate of ₹ 1,000.00, and an amount of ₹ 1,000.00. The item is associated with the image 'ETL-ART-2019-00013'.


Sr	Description	Quantity	Rate	Amount
1	 ETL-ART-2019-00013 Rent	Month 1	₹ 1,000.00	₹ 1,000.00

Figure 4: Print Preview of Sales Invoice in ERPNext



ERPNext's CRM and Selling modules focus on managing customers and the sales cycle that follows. You can:

- Connect to Exotel for receiving incoming calls and storing contacts.
- Automate assignments for your sales team and track their efficiency
- Manage the customer lifecycle, right from lead generation to conversion
- Send personalized quotations, orders, and invoices as per your brand
- Send and receive emails directly from ERPNext — no dependency on email apps
- Analyze customer acquisition and loyalty reports to find customer's YoY revenue

## 2.3 Inventory and Stock

Be it FMCG (Fast Moving Consumer Goods) or MRO (Maintenance, Repair, and Operation) items, managing inventory ensures that your capital is not locked in the wrong stock.

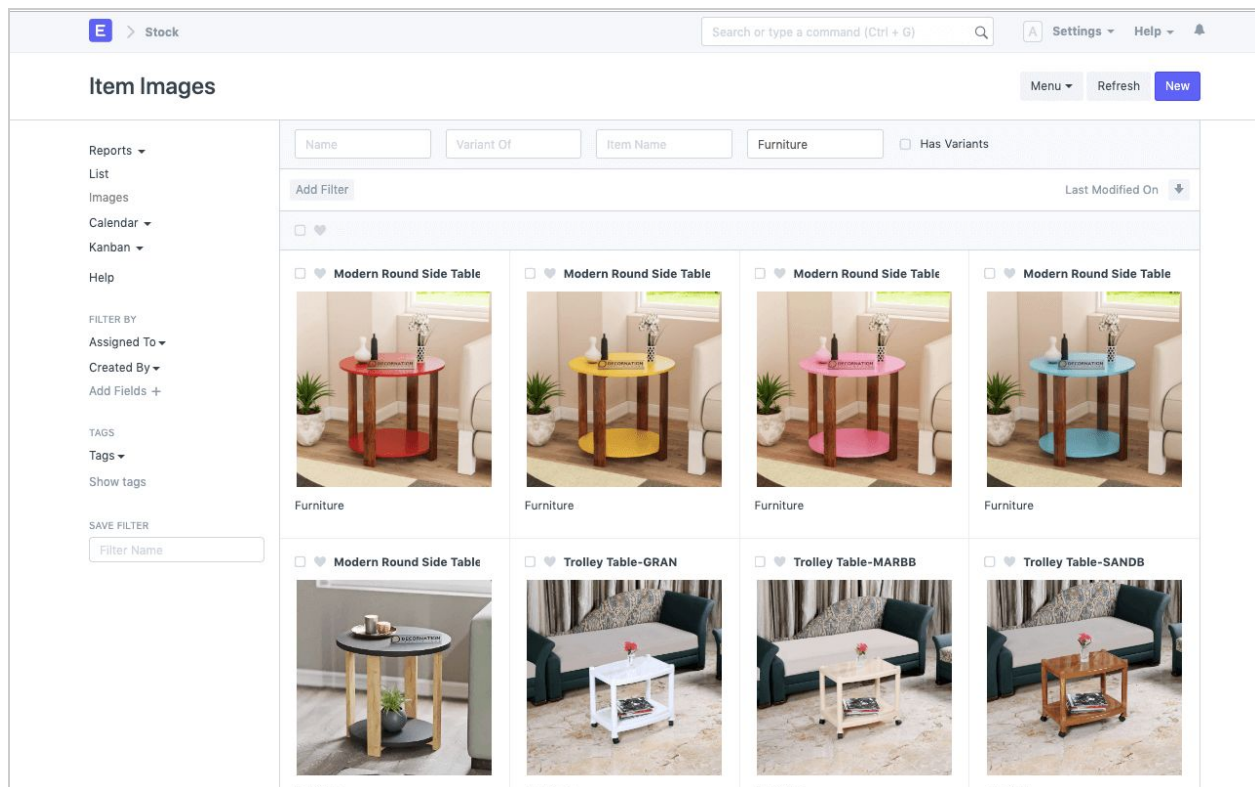


Figure 5: Image View of Items in ERPNext



ERPNext's Stock module lets you:

- Manage stock valuation based on FIFO or moving average
- Store batches or lots and allow automatic batch numbering
- Maintain serialized inventory and automatic generation of serial numbers
- Import your warehouse locations in a hierarchical tree
- Maintain price lists for items in different currencies
- Reconcile stock to periodically evaluate inventory valuation

## 2.4 Purchasing

Businesses recognize the significant cost savings that can arise from effective purchasing decisions, and likewise how poor purchasing strategies may result in disaster. For example, a vendor failing to deliver a purchasing order of meat to a hotel could hamper the business' ability to cater an event for 500 people.

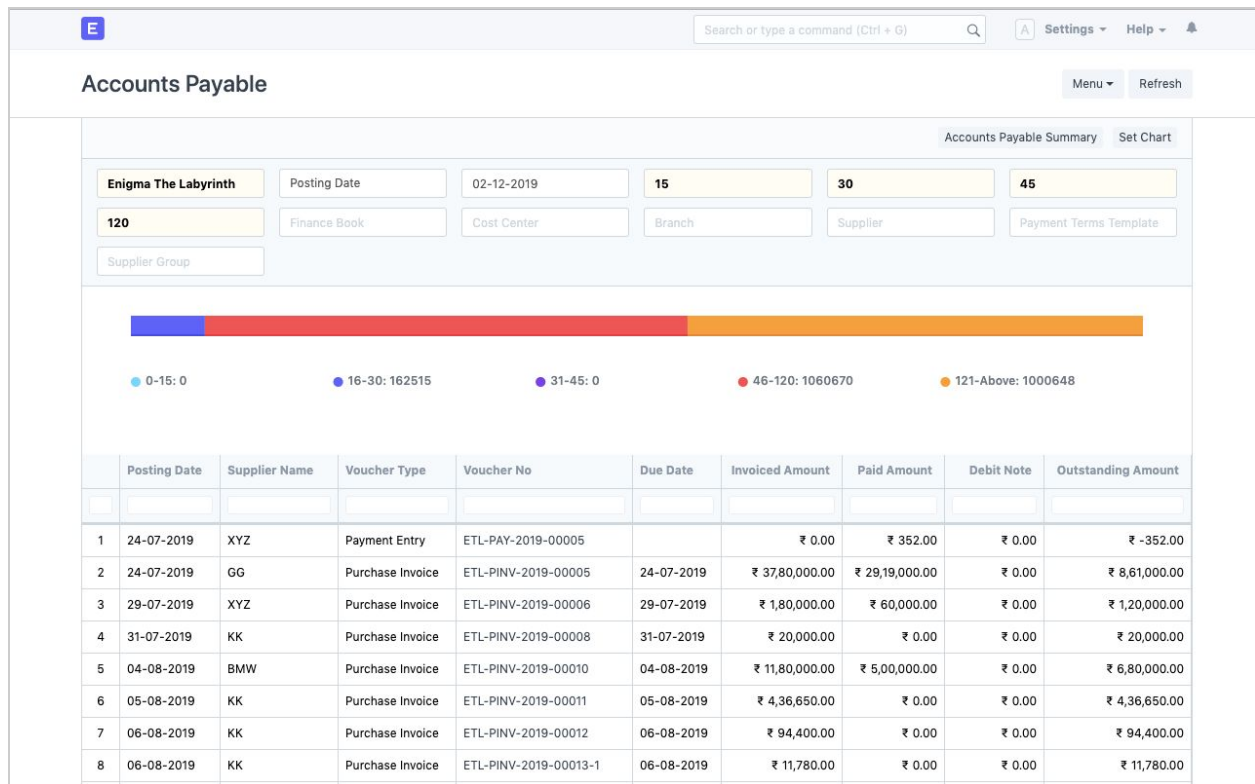


Figure 6: Accounts Payable Report in ERPNext

ERPNext's Buying module lets you:

- Manage your vendors
- Manage procurement of materials with material requests
- Create automatic material requisition requests
- Share RFQs with your vendors and compare the quoted prices
- Enable a Supplier Self Service Portal for them to create RFQs and upload invoices

## 2.5 Customer Support / Help Desk

Without a system for handling customer queries or issues, there is a chance you'll lose the customer that invested in your business. Enabling a flawless customer experience is significant to ensure customer satisfaction, and it also boosts your relationship with your customers.



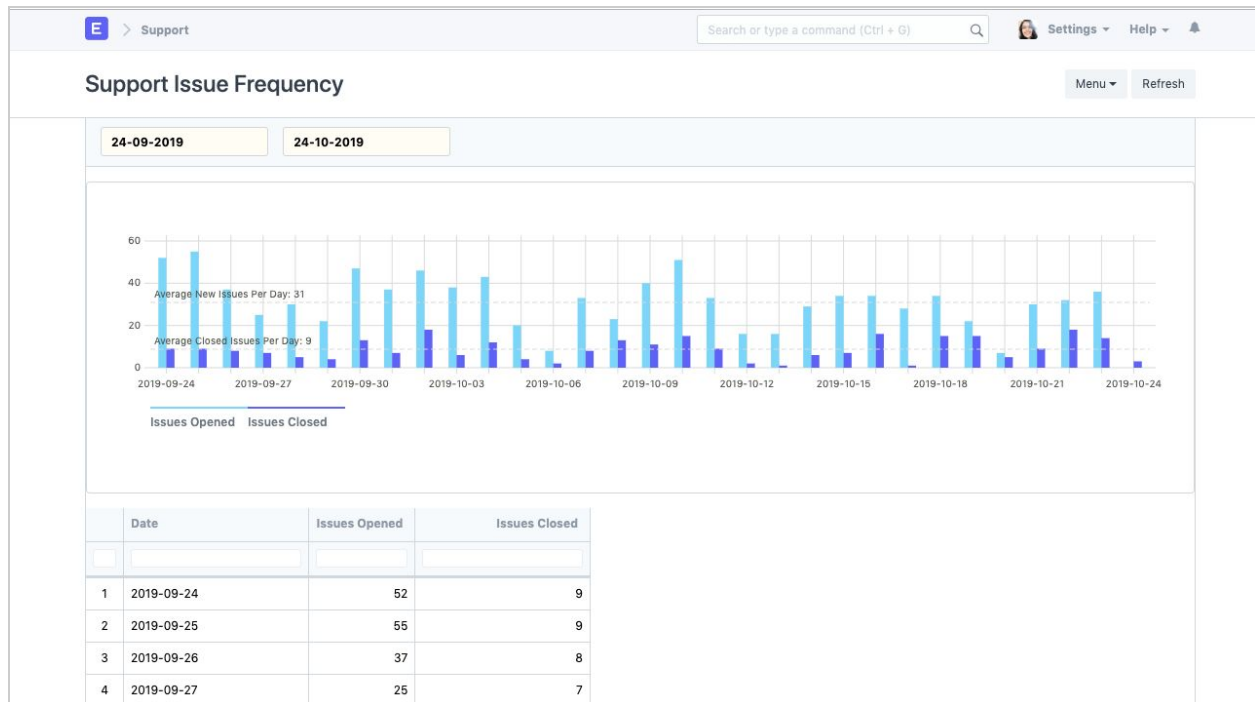


Figure 7: Support Issue Frequency Report in ERPNext

Real-time insights help identify bottlenecks in the help desk and implement best practices faster. ERPNext's Support module lets you refine your customer support with all standard features of a help desk system. These include:

- Managing queries raised by customers from the Issue portal
- Automating support ticket assignment for your customer support team
- Handling omnichannel interactions (call/email)
- Maintaining SLA (Service Level Agreement) and tracking fulfillment
- Creating of help articles directly from issue tickets to increase knowledge base



## 2.6 Projects

Planning projects ahead of time enables you to allocate budgets and estimate deadlines more accurately. You can also need to have forecasts about ongoing projects.

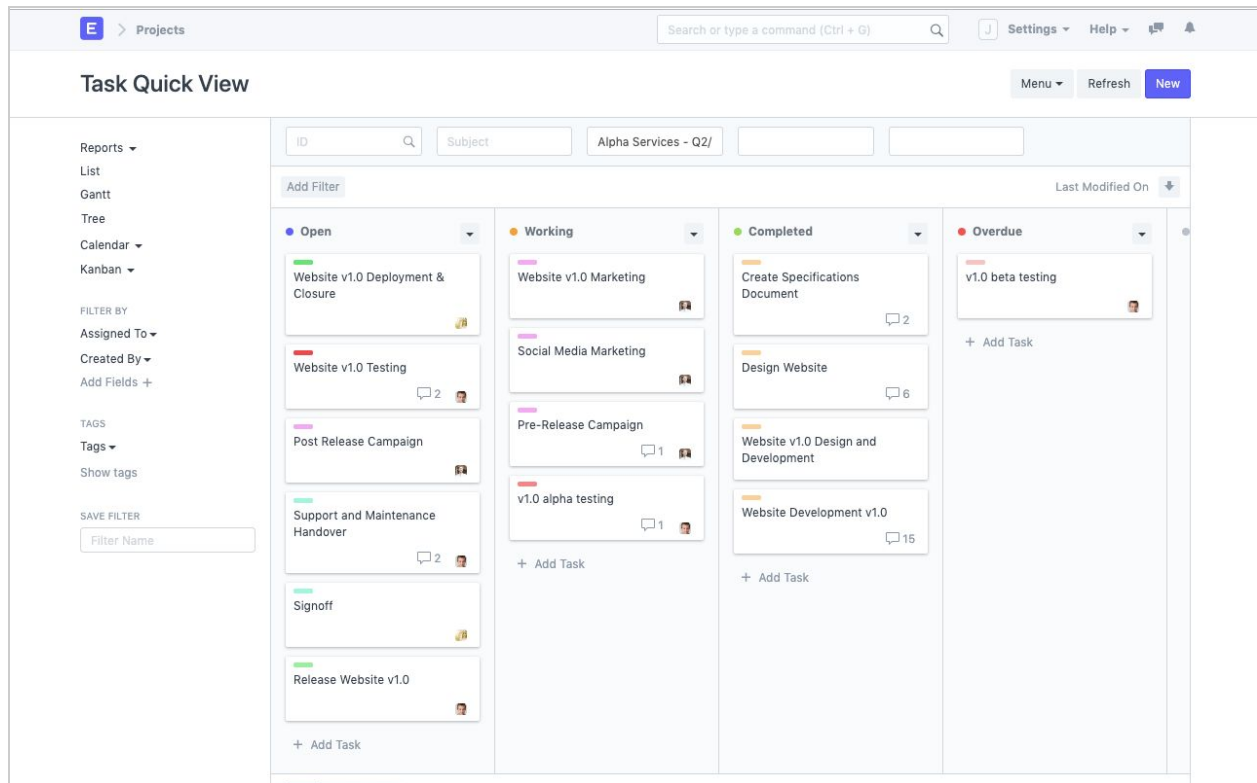


Figure 8: Kanban View of a project's tasks in ERPNext

ERPNext's Project module lets you:

- Create project templates for repetitive tasks
- Maintain to-do lists and assign team members to various tasks
- Chat in real time with your internal team members, which removes the need for an external communication tool
- Simplify time tracking and billing customers for deliverables of each task
- Give access to customers so they can check the status of the ongoing tasks



## 2.7 Human Resource and Payroll Management

Acquiring and retaining great talent is a mandate for ensuring that your business does not suffer because of low employee engagement. For a growing business, an HRMS tool is critical because compliances and data security cannot be compromised at any point.

HR-PRUN-2019-00004 Pending

SELECT EMPLOYEES

Posting Date: 29-11-2019 Company: Enigma The Labyrinth

EMPLOYEES

Employee Details

	Employee	Employee Name	Department	Designation	
<input type="checkbox"/>	1	HR-EMP-00006: Evelyn Samuels	Evelyn Samuels	Research & Develop...	Researcher

☒ Validate Attendance

☒ Salary Slip Based on Timesheet

SELECT PAYROLL PERIOD

Start Date: 01-11-2019 End Date: 30-11-2019

☐ Deduct Tax For Unclaimed Employee Benefits

☐ Deduct Tax For Unsubmitted Tax Exemption Proof

Figure 9: Payroll Entry in ERPNext

ERPNext's HRMS module comes with exhaustive features:

- Talent acquisition management to attract and retain talent
- Managing employee information
- Training and employee onboarding
- Managing employee attendance, leaves, loans, advances, and expenses
- Configurable salary structures and payroll processing
- Password-protected salary slips



## 2.8 Add-Ons

ERPNext addresses most of the fundamental problems that businesses struggle with. Added benefits include the following.

### 2.8.1 Integrations

ERPNext has a host of built-in integrations with popular applications such as Google and Dropbox, and you can configure backups of your data from within the system. There are also payment integrations like Razorpay and PayPal, as well as ecommerce platforms like AWS, Shopify and WooCommerce. ERPNext ensures that your accounting books are updated regularly depending on the multiple sales channels that you utilize for your business. These [integrations](#) also help you to migrate your business processes to ERPNext faster.



Figure 10: Integrations

### 2.8.2 Migrators and Importers

Data is integral to any business, be it an SMB or enterprise. When you are considering switching your system, it is important to get all your data from the legacy products. ERPNext comes bundled with QuickBooks and Tally migrators to accelerate the migration of data, and it also allows you to bulk upload your data with the Data Import Tool. Migration from a legacy system can be a hassle, but this tool allows you to insert records in ERPNext, one document at a time.

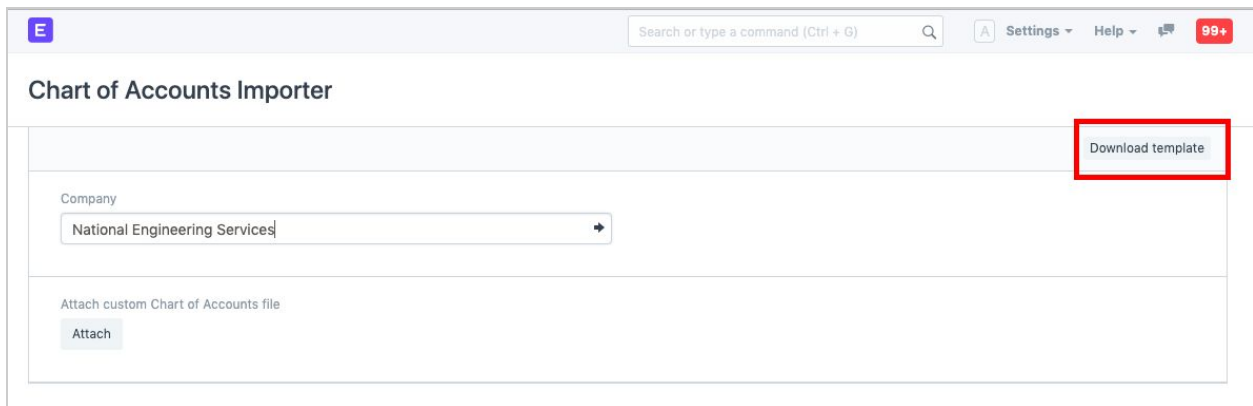


Figure 11: Chart of Accounts Importer in ERPNext

When installed, ERPNext creates a standard Chart of Accounts with the integral accounting ledgers of a business. You can choose to use this as it is or upload your own accounting ledgers with the Chart of Accounts Importer.

### 2.8.3 Multilingual ERP

ERPNext can be used in the local language of a region. This allows faster adoption in the market because there is a certain continuity that comes when you can use the product in your own preferred language. ERPNext supports 130+ languages out of the box, and we're building more everyday.

### 2.8.4 Mobility

Because it's a cloud-based ERP, you don't have to rely on one device for using ERPNext. It can be accessed on a desktop, or you can simply use it on your mobile device in the browser. There are also mobile applications for Android and iOS platforms, which keep work flowing even when you're on the go. You can also use the camera of your device to scan the barcodes of your products, thereby eliminating the expenses incurred for a barcode scanner.

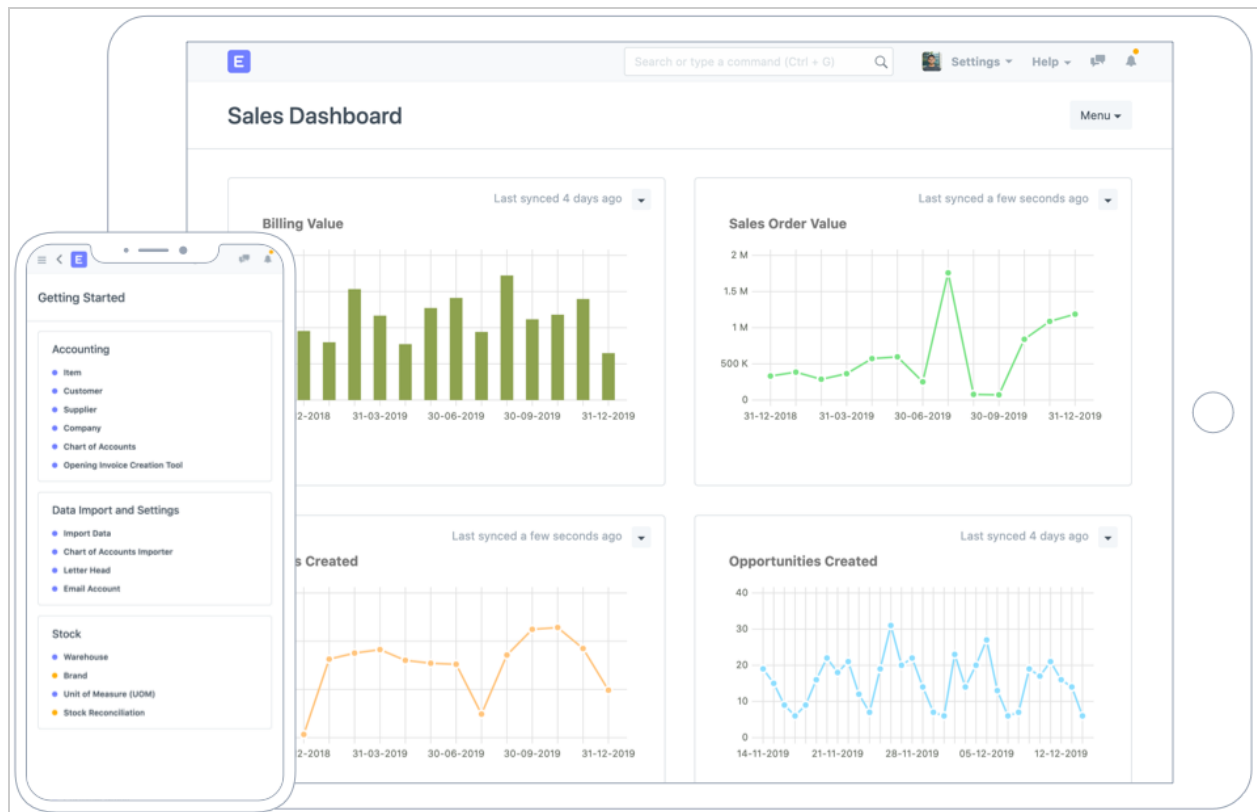


Figure 12: Mobile View of ERPNext



## 3. Frappe Framework

Extend ERPNext to cover any missing process with the low-code Frappe Framework





## 3.1 The Frappe Framework

Frappe is a full stack, batteries-included, web framework written in Python and JavaScript with MariaDB as the database. It is pretty generic and can be used to build database-driven apps with an elegant and consistent UI.

📦 Languages: <b>Python &amp; JavaScript</b>	📦 Caching: <b>Redis</b>
📦 DB: <b>MariaDB or PostgreSQL</b>	📦 Realtime: <b>NodeJS + SocketIO</b>
📦 Webserver: <b>Gunicorn + NGINX</b>	📦 Packaging: <b>Rollup</b>
📦 Templating: <b>Jinja</b>	📦 Process Manager: <b>Supervisor</b>
📦 Job Queues: <b>Python RQ</b>	📦 Command Line: <b>Bench</b>
📦 CSS: <b>Bootstrap 3 / 4</b>	

Figure 13: Technology stack upon which Frappe Framework has been built

## 2.2 What makes the Frappe framework stand out?

The key difference in Frappe compared to other frameworks is that metadata is also treated as data and is used to build front-ends very easily. Because of its monolithic architecture, Frappe comes with almost everything you need to build a modern web application. It has a full blown Admin UI called the Desk that handles forms, navigation, lists, menus, permissions, file attachment and much more out of the box.



✔ Metadata Driven	✔ Users and Permissions
✔ Admin UI	✔ MariaDB and PostgreSQL
✔ Report Builder	✔ Calendar, Kanban Views
✔ Pluggable Scripts	✔ Emails
✔ REST API	✔ Dashboards
✔ Migrations	✔ PDF

Figure 14: Features that come bundled in the Frappe Framework

The polished UI is aesthetically pleasing and easy to grasp. The abstractions and components that it comes with make it easier for businesses to leverage the framework without even having to spend a penny. The thought that has gone into building the framework's abstraction makes the process of building your architecture on top of it much easier.

## 2.3 Customization Capabilities

Most customizations don't even require you to invest in code development. They can be done using JavaScript because of the very consistent Frappe client API, no proprietary language required. Apps built on the Frappe framework can be easily customized.



<input type="checkbox"/>	Label	Type	Name	Options	
<input type="checkbox"/>	1 Kanban Column	Select	kanban_column		▼
<input type="checkbox"/>	2 Subject	Section Break	subject_section	fa fa-flag	▼
<input type="checkbox"/>	3 Series	Select	naming_series	ISS-2019-	▼
<input type="checkbox"/>	4 Subject	Data	subject		▼
<input type="checkbox"/>	5 Customer	Link	customer	Customer	▼
<input type="checkbox"/>	6 Account	Data	account		▼
<input type="checkbox"/>	7 Account Expiry	Date	account_expiry		▼
<input type="checkbox"/>	8 Trial Account	Check	trial_account		▼
<input type="checkbox"/>	9 Raised via Support App	Check	raised_via_support_app		▼
<input type="checkbox"/>	10 Bug	Check	bug		▼
<input type="checkbox"/>	11 GitHub Issue	Data	github_issue		▼
<input type="checkbox"/>	12 Issue in Doctype (If Applic...	Link	issue_in_doctype	DocType	▼

Figure 15: Form level customizations in ERPNext

Although ERPNext is a comprehensive ERP with all standard modules and domains, it allows you to **customize on the fly** effortlessly, unlike some other software that requires ‘success packs’ or additional consultation hours for a single customization like changing the name of a label. This is what makes ERPNext popular: the power to control the architecture of your ERP system.

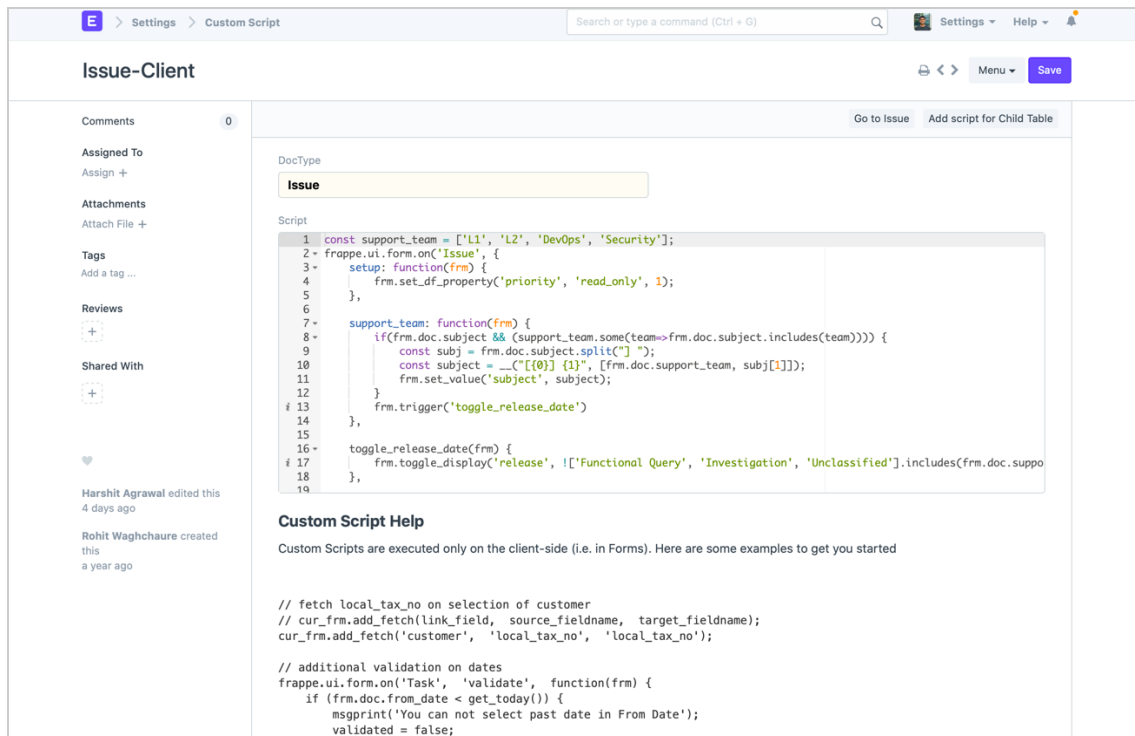


Figure 16: Custom Script in ERPNext

You can create:

- Custom Fields
- Custom DocTypes
- Custom Print Formats
- Custom Scripts
- Server Scripts
- Custom Translations
- Custom Applications



## 4. Advantages

ERPNext offers unparalleled advantages over any conventional ERP



With the multitude of options available in the market, it is natural to get disoriented because of the noise all products make. You should choose ERPNext because of the value that it will add to your business, and that is the primary USP.

ERPNext has been recognized as one of the most user-friendly ERPs because of its simple and elegant UI, which allows the users to achieve maximum output with minimal clicks. It can handle complexities of any business. Anything is possible with the Frappe Framework and ERPNext — the only limit is your imagination.



Figure 17: FrontRunner Quadrant by Gartner published on April 2019



## 3.1 Excellence and Consistency

“It was love at first sight. The more we got into ERPNext, the more we fell in love.” - Nikhil Sharma, VP Technology at ElasticRun

ERPNext’s ultimate goal is to solve the challenges that are faced by SMBs and enterprises with a simple-to-use ERP solution. Keeping this in mind, the framework has been built to handle complexity of any scale. And this is its true proposition. With ERPNext, a simple but powerful platform, you get a high-quality solution, an elegant UI, and various industry-specific features out-of-the-box — all built on an awesome technology stack. You only have to learn to use a few screens and you’ll be familiar with 90% of the system.

## 3.2 Free And Open Source (FOSS)

“There was a Zerodha before ERPNext and then there was a Zerodha after.” - Kailash Nadh, CTO at Zerodha

An open-source project empowers you to pursue your ambitious goals without compromising budgets. Open source since its inception, ERPNext is one of the top open-source ERPs globally in terms of users, community and traction. With a community of 10,000 members globally, ERPNext gives you the edge to choose who you wish to work with, without being locked to a single vendor. ERPNext is 100% Free and Open Source Software, and that gives you the freedom to build your own architecture as per your liking and exercise full control.





Figure 18: ERPNext Community (Photo from Conference 2017)

### 3.3 100% Freedom

'Well designed, easy to use ERP and surprisingly easy to customize.' - Dhananjay Palshikar, Sapcon Instruments

ERP products are complex by nature, and open source ERPs are a very small but fast-growing segment. Customizing ERP products is often a bottleneck. The homegrown, powerful Frappe Framework behind ERPNext gives you the freedom to effortlessly configure and customize the platform as per your business needs. The stack allows blazing-fast development, deployment and updates. This means that if there is a new rule for taxes or your company makes an overnight change in policy, adapting to it will take minimal effort. This robustness and scalable nature of the framework lets you create your own ERP.



### 3.4 Agility

The extensibility and flexibility of ERPNext is unrivaled. Every custom field you create becomes instantly available as an API point in the powerful interface of the ERP software.

- Martin Seibert, CEO at //Seibert /Media

The model for the development of ERPNext is RAD (Rapid Application Development), which allows for faster feedback, more flexible scope and quicker changes. This applies to your implementation as well. A lot of time is also spent in documenting the business requirements, understanding, requirement analysis, etc. in the Waterfall methodology; whereas, in Agile, the implementation happens continuously using standard features of a software. Unlike traditional ERP products, ERPNext can be implemented faster with the agile model when business goals are clearly identified.

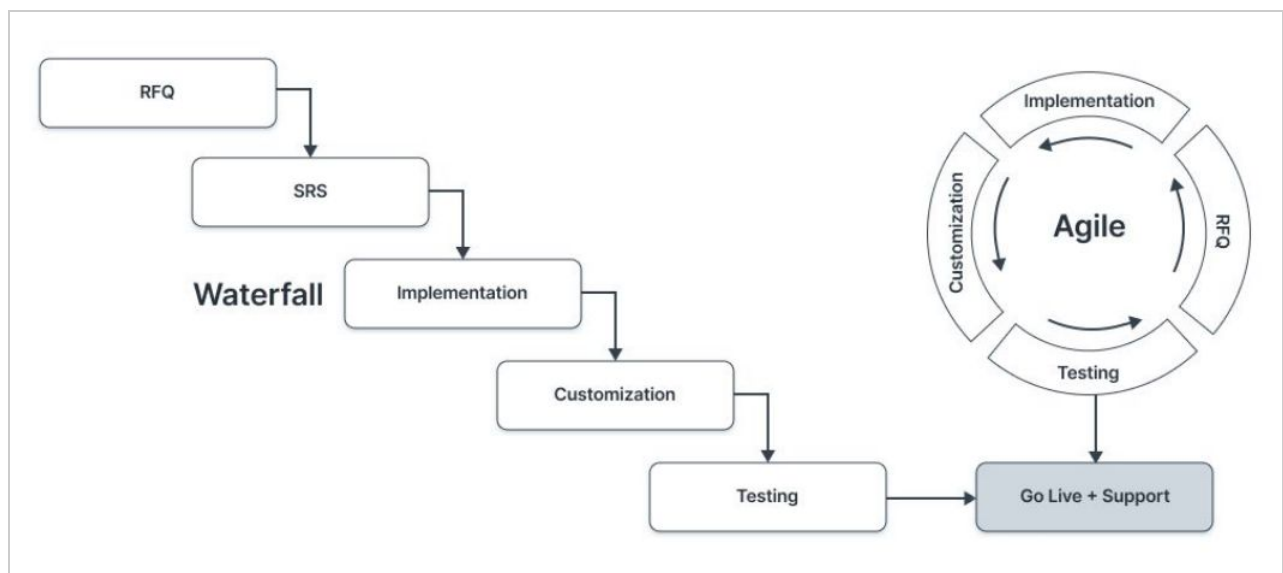


Figure 19: Traditional Waterfall Model vs Agile Model of Implementation



### 3.5 Zero Touch Implementation

“Installed ERPNext at Bengaluru Airport and never looked back.” - ElasticRun

ERP implementations are complex and notoriously difficult jobs. Handling change management correctly is crucial for an organization's success. ERPNext, with its excellent documentation and video tutorials, can be self-implemented seamlessly. It's literally a '*Do It Yourself*' ERP. It is because of this zero-touch approach and agile methodology that the process of ERP implementation has been reinvented with ERPNext. With excellent resources such as the comprehensive user manual and video tutorials, you can onboard yourself within a couple of days, rather than months.

### 3.6 Low Total Cost of Ownership

“ERPNext will be the best value for money, lowest TCO over 3 years in comparison to other ERP's.” - Shiva Kumar, CIO at WR Carpenters Pacific

As mentioned earlier, ERPNext is free and open source, hence there is no cost for the license. It can be deployed within minutes, thanks to the *Easy Install Script* that takes care of the technicalities. An immediate gratification is that the TCO of ERPNext is much less than what you might be paying to your current vendors. All in all, ERPNext is the key to a sustainable future with its low TCO and a highly deliverable platform.



## 4. About Frappe

Frappe has been building and publishing amazing open source products and libraries since 2008



## 4.1 The Company

Since 2008, Frappe Technologies is the OEM and core maintainer of the Frappe Framework and ERPNext. Our goal is to empower the world to do amazing things with minimal complexity. With an enthusiastic and motivated team of 40, Frappe is growing in every sense of the word — be it our team or the number of products that we're bringing out.



Figure 20: Frappe Team



## 4.2 Core Values And Philosophy

### 4.2.1 Innovation

Developing a fully open-source ERP that is extensible and robust is not a cakewalk. The inspiration for building ERPNext came out of necessity, not for making profits. Someone once said, “Creativity is intelligence having fun.” Rushabh Mehta (Founder and CEO) often encourages the team to think from first principles, thereby empowering them to experiment. These experiments and incubation of ideas are what lead to innovation. By following this approach, we’ve made numerous [projects](#) that would otherwise never be out in the world. The Frappe Framework, FrappeJS, Frappe Books, Frappe Cloud, Frappe DataTable, and Frappe Charts are all outcomes of first-principles thinking.

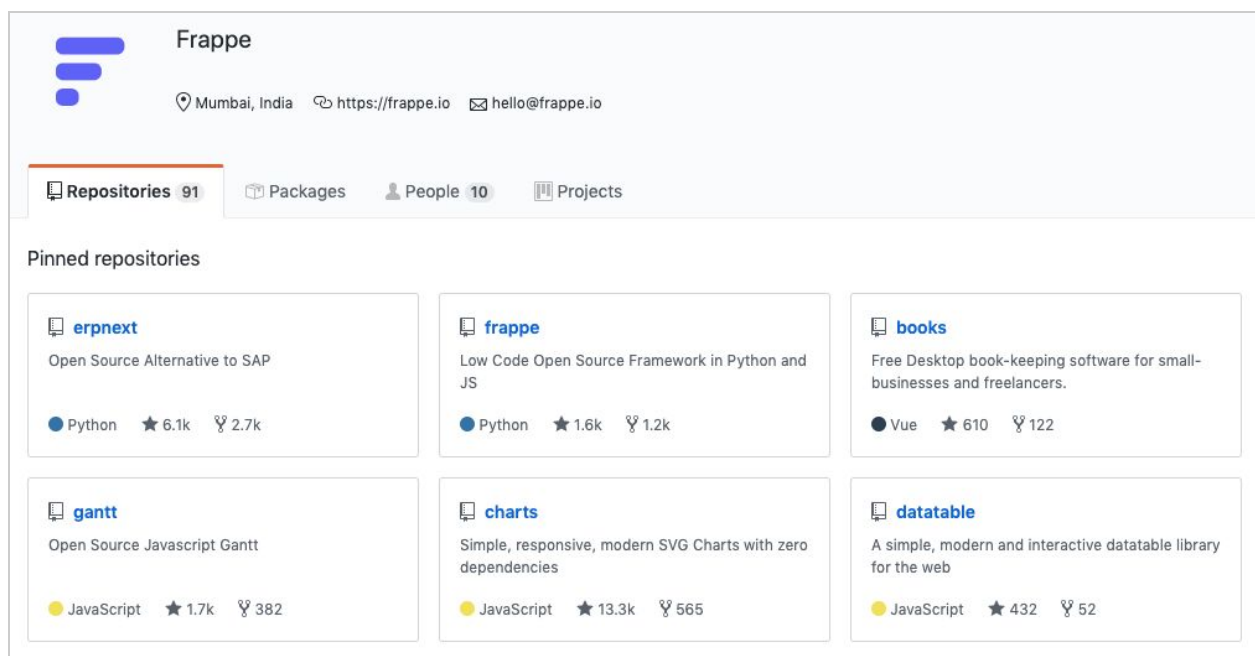


Figure 21: GitHub Profile of Frappe Technologies





## 4.2.2 Technology-Driven

Frappe has a technology-driven culture, and our team is always looking to solve problems with innovative solutions. This has helped us become who we are today, and our urge to provide awesome solutions to all kinds of businesses remains unquenched. The homegrown web framework has helped us build ERPNext with a small team because of high code reuse. The deeper you go into the technology stack, the more polished the user experience. Apple inspires us to think like this. We adopt the latest tech stack and refactor code so that our products are in sync with what's going on in the world. For instance, Frappe Books is built on FrappeJS (another homegrown framework), which uses VueJS, Tailwind CSS and JavaScript.

## 4.2.3 Experience of more than 1000 implementations

For more than 10 years, Frappe has been engaged in building ERPNext with a focus on high code quality and robust, scalable architecture. As mentioned a couple of times, we have leveraged our experience to build long-term assets for hundreds of businesses globally. With a mature mindset and fresh ideas, the Frappe team has excelled in providing services for changing needs of various industries. Be it our products or service offerings, everything is transparent so that you can make an informed decision.



## 5. Stories

Battle-tested by the best businesses on the planet





## 5.1 Zerodha — India's #1 Stock Broker

### 5.1.1 Background

Zerodha is India's largest stockbroker. They first discovered ERPNext in 2016. After just 5 days of customizations and extensions on top, they had already deployed it in production.

The flexible nature of ERPNext lets Zerodha scale and deploy it for their trading platform's backend smoothly. User adoption was not a challenge, and users were able to pick up the user interface with minimal training. ERPNext has helped Zerodha to streamline everything into a standard workflow, which has enabled them to rapidly build forms and applications required by the company's ever-evolving business requirements.

### 5.1.2 Key Numbers

- 1,200 employees
- 1.5 billion general ledger entries
- 9 billion invoice items
- 2 million customers
- 4-5 million database records daily

The Zerodha team is also using the Frappe Framework extensively to build several internal microservices. The framework has streamlined their business development process and made the UI and UX consistent across their internal applications. They primarily use the Frappe framework for managing their human resources and the help desk for their customers.

### 5.1.3 Here's what they say

"ERPNext powers our core business ranging from ledgers, stockbroking compliance to support and HR systems. It has scaled really well to our volumes with continuous



improvement to the product. Combined with a sleek UI, ERPNext + Frappe apps have made things a lot better across our processes. It fits well into the complete open source stack running our business."

- Vinay Kumar, Assistant Vice President of Technology at Zerodha.

## 5.2 WR Carpenter Estates — Papua New Guinea's Largest Tea Manufacturer

### 5.2.1 Background

WR Carpenter Estates produces the best quality tea in the region, and it compares favourably with tea of Indian, African, and Indonesian origins. Carpenter Estates owns and operates 4 tea plantations, each with its own factory. These factories were first built in the mid-1960s and are still rapidly promoting Papua New Guinea's reputation as the leading producer of quality tea.

They came across ERPNext through a Google search for an open source ERP. An important part of this implementation was that it was fully remote, and this company went live with the Stock module (Inventory) within 24 days. This was possible because an agile model was adapted and business goals were clearly identified.

### 5.2.2 Key Numbers

- 900 employees
- 2 million general ledger entries daily
- 4,000 items
- 1,000 customers
- 800 vendors



### 5.2.3 Here's what they say

"Carpenters Group by the end of 2017, decided to transform their businesses and bring in automation, visibility, and agile into their operations, customer interactions. To support this vision, IT had to be an integral part across all the different businesses, a key factor to this is to have a single platform of ERP rather fragment ERP systems unique to the industry. ERPNext was selected due to the flexibility it provides for the Business Processes and an Agile System for migrating businesses. To this date, we have been able to roll out ERPNext to Manufacturing, Retail and Properties. The team from ERPNext has been truly professional, very flexible and very accommodative in our changes required on the Business Processes. ERPNext, when completed, will be the best value for money, the lowest TCO over 3 years in comparison to other ERP's."

- Shiva Kumar, Chief Information Officer at WR Carpenters Pacific Limited.

## 5.3 Sapcon Instruments — Level Instruments Manufacturer from India

### 5.3.1 Background

A proud 35+ year old Indian company, Sapcon Instruments is a leading manufacturer of level measurement and speed instruments. These include level indication-related solutions and feature a broad range of level-sensing technologies such as capacitance, RF-admittance, conductivity, ultrasonic and magnetostrictive. Understanding client problems and always ready with a solution, they develop customized and cost-effective international quality standard products.

Both Make-To-Stock and Make-To-Order manufacturing styles are carried out at Sapcon. They prepared elaborate designs and customized ERPNext to suit these business requirements. Managing Item Variants is facilitated in ERPNext out-of-the-box. No coding required, just few configurations and you can manage product variants effortlessly. They used Python scripts to import 1 million product variants, Bill of Materials in order to



accelerate their data migration process. They are using ERPNext for their Accounting, Inventory, Manufacturing and Website as well.

The ERPNext Website Builder supports website creation, product catalogues, shopping carts, web forms, SEO and redirects, custom styling (Bootstrap/Jinja), and more! Once their business processes were running smoothly on ERPNext, Sapcon delved into this module, and till this date their website is powered by ERPNext. This implementation was also done remotely and seamlessly via the Frappe engagement.

### 5.3.2 Key Numbers

- 1 million item variants
- 90,000+ installations
- 8,000+ clients
- 50 users
- Exporting to 90 countries

### 5.3.3 Here's what they say

“Neat and responsive UI, well designed, easy to use ERP and surprisingly easy to customize. Based on the Frappe framework, it makes it easily customizable. Great for manufacturing with Multi Level BOMs, managing multiple production departments and no vendor lock-in, the software is 100% open-source. It provides great security to small scale businesses. Community driven and transparent approach to development. Better purchase, inventory and production management. Better interoperability between different departments — Sales, Accounts and Production. More importantly better adherence standard BOMs.”

- Dhananjay Palshikar, Research & Development Manager at Sapcon Instruments



## 5.4 C.E.R.H.I - World Bank-supported initiative in West Africa

### 5.4.1 Background

CERHI is a World Bank-supported project at the University of Benin. The Centre of Excellence in Reproductive Health Innovation (CERHI) will build capacity within West Africa's tertiary educational system for implementing high-quality training and applied research for reproductive health professions to tackle policies and programs for reducing the region's high burden of fertility, unsafe abortion, maternal mortality and HIV/AIDS.

### 5.4.2 Key Numbers

- 500+ employees
- 30 system users
- 1,000+ items
- Live within 90 days

CERHI hired a consultant, Adebayo Salami, in their search for robust software, who in turn came across ERPNext on Google while looking for open source ERPs. Within minutes, his account on ERPNext.com was ready and he started with all that was available: documentation, video tutorials and the community forum. This is yet another example of a zero-touch ERPNext implementation.

### 5.4.3 Here's what they say

"ERPNext was chosen because of its ease of use and friendly user interface. Considering the legacy data was not proper, it was first challenging for users to get onboarded with ERPNext. But the simplicity with which ERPNext is built on worked as a gamechanger and we have successfully implemented Accounts, Stock and HRMS modules."



- Adebayo Salami, IT Consultant of CERHI



Figure 21: Key Users



# ERPNext by Frappe



Accounting



Selling



Buying



Stock



Assets



HRMS



Manufacturing



CRM



Assets



Agriculture



Projects



Retail



Non-Profit



QMS



Healthcare



Customization



And More



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