User Manual (English)

Explore modules to delve deep into ERPNext features

Basics

Introduction

Introduction to ERPNext and things to understand before you start your implementation

Setting Up

Learn how to configure ERPNext for your company and organization structure

Using ERPNext

Learn how to navigate your way around the user interface and helpful utilities

Automation

Learn how to automate ERPNext for saving your time from performing periodic mundane tasks

Core Modules

Accounts

Financial accounting from setup to billing, journals, ledgers and reports

Stock

Inventory management with hierarchical location tree, stock movements, serials and batches

CRM

Tracking presales process from Lead capturing, tracking open Opportunities, to emails and calls

Selling

Selling covers sales operations like Quotations (Offers), Sales Orders and Delivery tracking

Buying

Manage purchasing in ERPNext right from material requisition, supplier quotes to Purchase Orders

Human Resources

Leave and Attendance Tracking, Expense Claims, Salary and Payroll, Recruitment, Performance and more

Projects

Project and task management with full integration with billing and cost centers

Support

Track customer tickets and issues, maintain server levels and track response and resolutions

Asset

Fixed asset management and tracking with depreciation, asset allocation and movement tracking

Quality

Quality management system with procedures, goals, tracking and reviewing

Industry Modules

Manufacturing

Manage multi-level Bill of Materials, plan and track production with Work Orders

Education

Manage the entire life cycle of a student from admission, enrollment to attendance and assessment

Healthcare

Manage patients, practitioner schedules and their reports with appointments, consultations, procedures and lab reports

Agriculture

Manage multiple farms, crops, growing cycles, crop diseases and much more

Non Profit

Track members, memberships, volunteers, grants for your non profit

Hospitality

Management multiple restaurants and hotels with table and room booking (beta)

Customization and Integrations

Customize ERPNext

Learn how to customize ERPNext with custom fields, print formats, custom scripts etc

Regional

ERPNext has built-in integration support for many regions like India, United States, UAE, Italy

Integrations

Learn how to leverage built-in integrations to payment gateways, Google, AWS and more

Translations

Learn how to contribute translations in ERPNext

Developer

Learn how to extend and contribute to ERPNext or build your own extension

Website and Portals

Website

Manage your website pages, product catalog, shopping cart, web forms and more with the built-in portal

Portals

Let your customers and vendors directly shop online, submit bids etc with ERPNext Portals