User Manual (English)

The following are the various modules and domains offered by ERP+ from Technocom, covering a wide range of businesses. You can be a small distributor, a manufacturer, running an educational institute, or a healthcare organization. There is something for everyone.

Connect

info@technocom.me
+973 39 394939
www.erpplus.me
www.technocom.me

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Domain: Non-Profit

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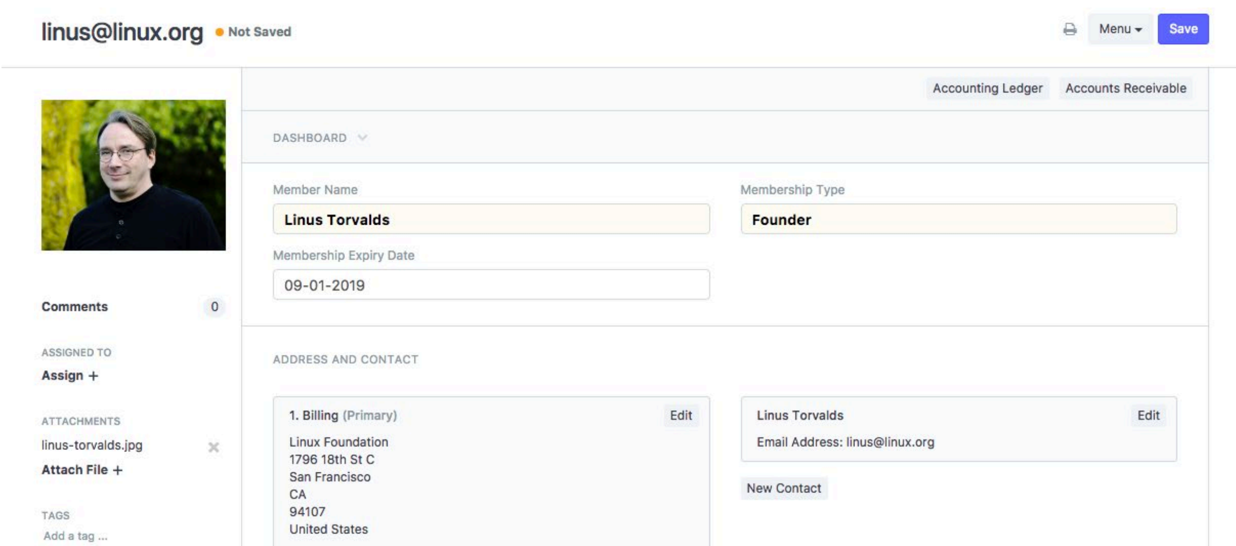
People who change the world need the tools to do it! The Non-Profit Module of ERP+ is designed for a non-profit organization, so that they can deliver well on their noble cause of a better world. You can go through this quick introduction before looking at the topics.

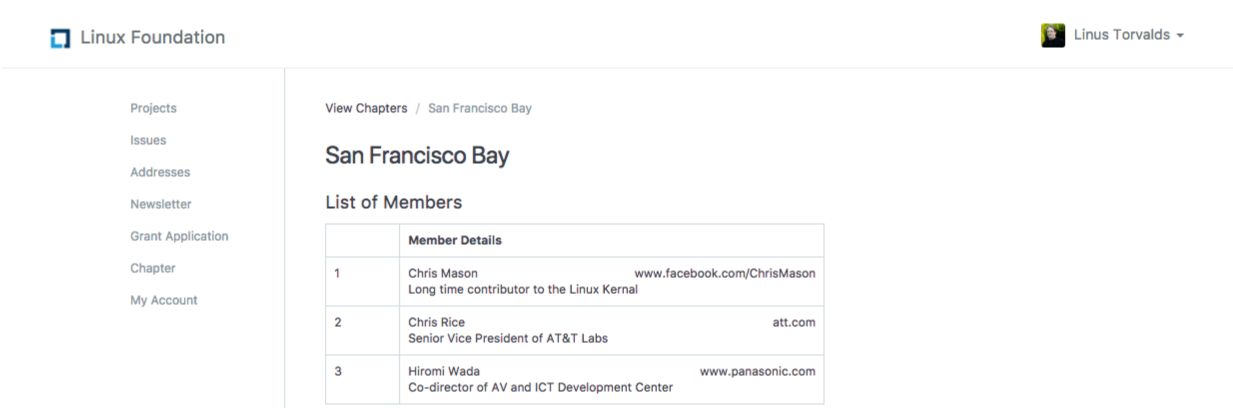
Introduction

Here is what a member page of a non-profit would look like in ERP+



Manager Members, Donors, Volunteers and More

This is a centralized system, which maintains and updates all the activities related to an Organization. This will track all activity related to Memberships, Chapters, Volunteer Management, Donor Management, Event and Grant etc.



1. Topics

1.1 Membership

1. Member
2. Membership Type
3. Membership

1.2 Volunteers and Donors

1. Volunteer Type
2. Volunteer
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4. Donor Type

1.3 Grant and Chapter

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1.1 Topic: Membership

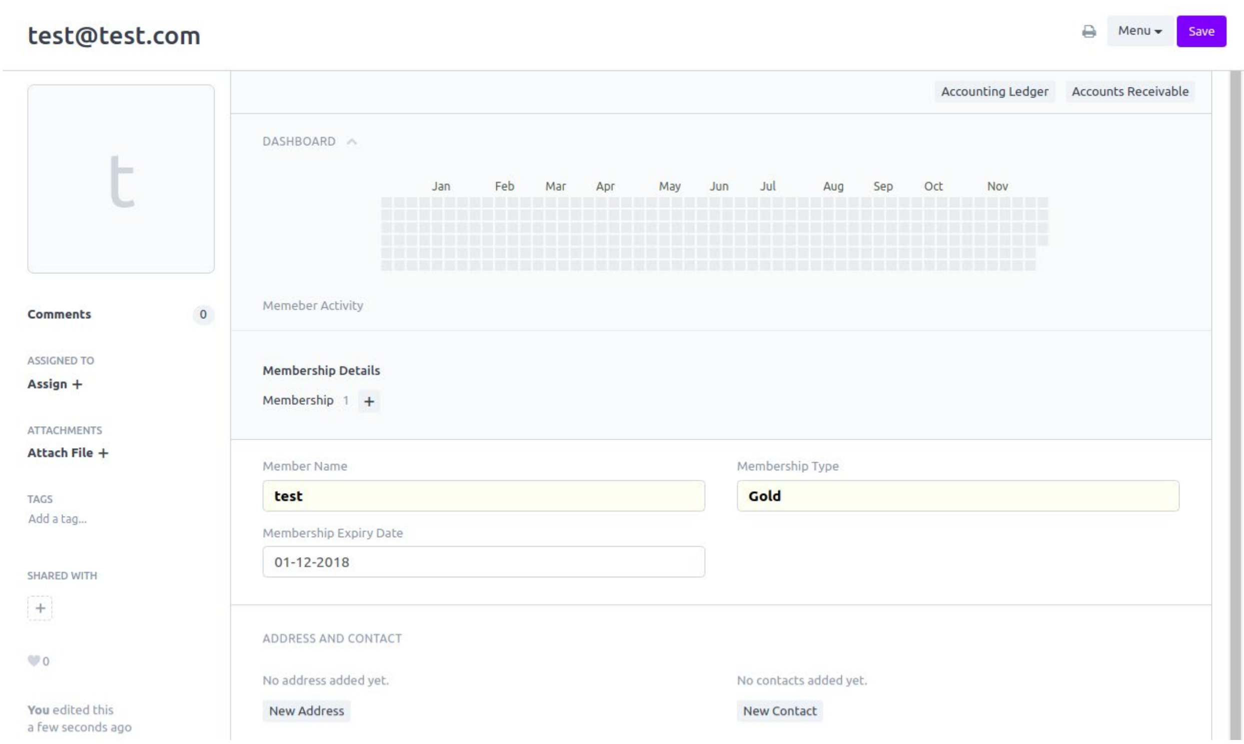
1. Member
2. Membership Type
3. Membership

1. Member

The Member doctype allows you to record the Member details for a Membership.

Members are simply contacts in your ERP+ database with one or more memberships. The contact may be an individual, a household, an organization, or some other contact sub-type, but it is always a contact to which a membership is applied.

To create new Member, go to: Non-Profit > Member > New



Email: Email field is the id of Member doctype.

Membership Type: Membership Type is link field to Membership Type Doctype. Member can select Available Doctype.

Membership Expiry Date: This Field fetch membership end date details from membership doctype.

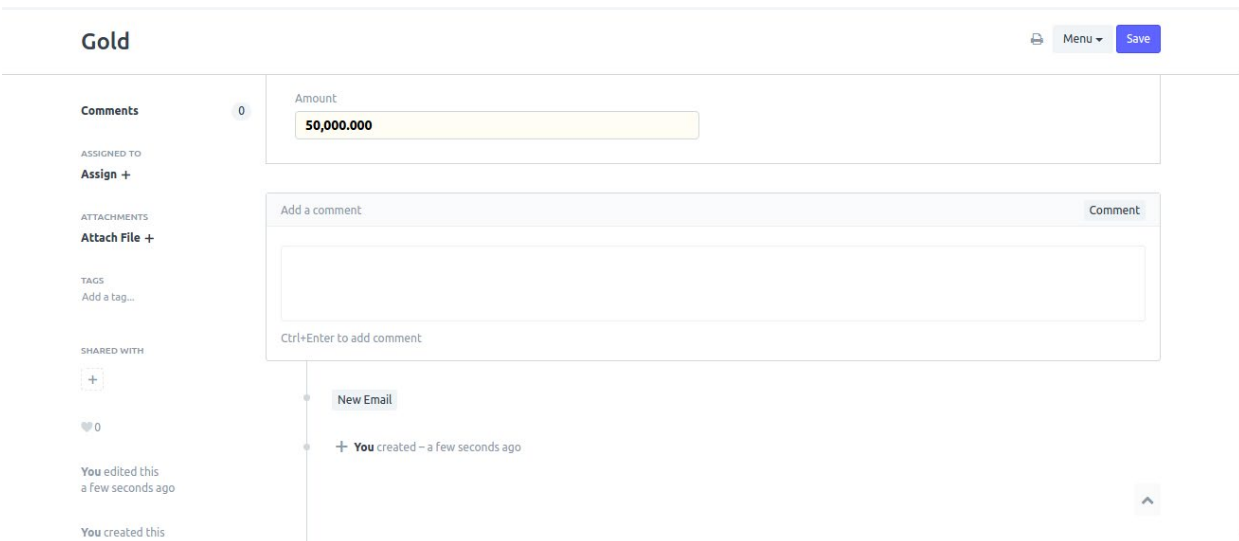
Address and Contact Section: This Section linked to address and contact doctypes.

2. Membership Type

Membership Types are a basic building block for membership management. Typically, an organization will set up a membership type for each of the different memberships that they offer. For the simplest membership structures, one membership type may be enough. For more complex membership structures, more membership types may be required. For example, an organization may define three membership types for 'regular', 'student', and 'honorary' members. Or an organization may choose to use membership types as subscriptions to their different publications, either free or paying ones.

In this chapter we will cover the most common set-up for membership types.

To create new Membership Type, go to: Non-Profit > Membership Type > New



Membership Type: The Membership Type is displayed throughout the system, on both public and backend pages so spend some time thinking about a membership type name that is appropriate to both audiences. It can be changed at a later date

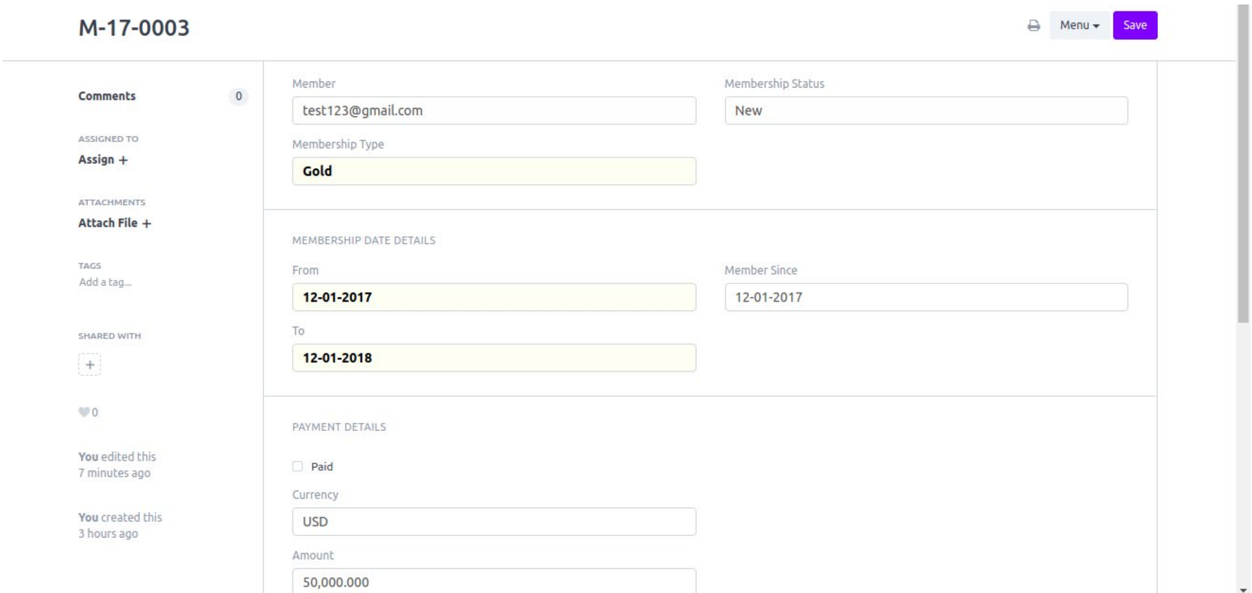
Amount: If your memberships are free you should enter 0 (zero) in this field. Otherwise you should enter the amount that must be paid for this membership type.

3. Membership

The Membership doctype allows you to record membership details for the Member.

Membership is a term which refers to any organization that allows people to subscribe, and often requires them to pay a membership fee or "subscription".

To create new Membership, go to: Non-Profit > Membership > New



Member: Member is a link field that fetches member details from Member doctype.

Membership Status: Membership Status is a select field which contains New, Current, Expired, Pending and Cancelled.

Membership Date Details section: This section contains information related to Membership start date, end date and member since date.

Payment Details: This section contains payment related details. If the person paid for membership checkbox paid is marked as checked else unmarked. Amount fetch based on membership type.

1.2 Topic: Volunteers and Donors

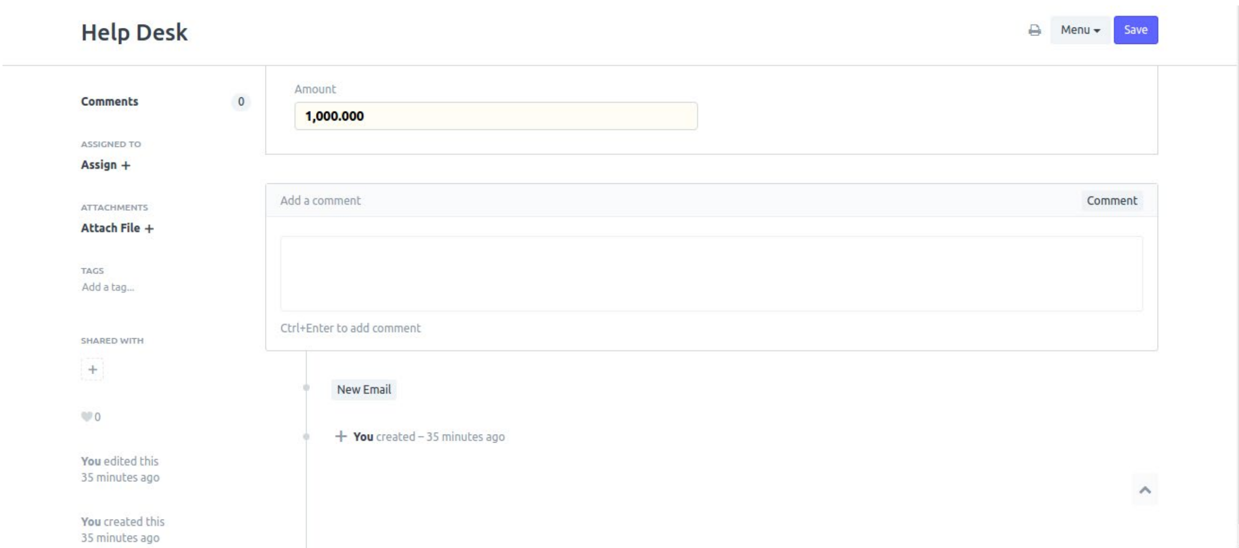
1. Volunteer Type
2. Volunteer
3. Donor
4. Donor Type

1. Volunteer Type

Volunteer Types are a basic building block for Volunteering management. Typically, an organization will set up a volunteer type for each of the different donation that they offer. For example, an organization may define three volunteer types for 'regular', 'Student', and 'Member' donor.

In this chapter we will cover the most common set-up for volunteer types.

To create new volunteer Type, go to: Non-Profit > Volunteer Type > New



Volunteer Type: The Volunteer Type is displayed throughout the system, on both public and backend pages so spend some time thinking about a membership type name that is appropriate to both audiences. It can be changed at a later date

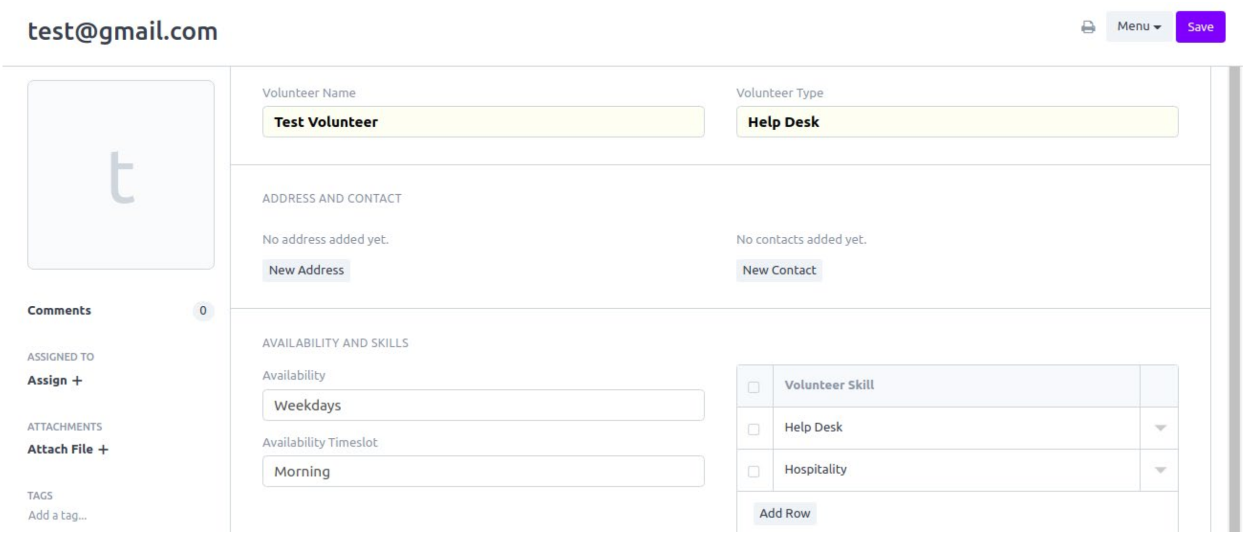
Amount: If your Volunteering are free you should enter 0 (zero) in this field. Otherwise you should enter the amount that must be paid to the volunteer.

2. Volunteer

The Volunteer doctype allows you to record the Volunteer details.

Volunteer are simply contacts in your ERP+ database with one or more volunteering program. The contact may be an individual, a household, an organization, or some other contact sub-type

To create new Volunteer, go to: Non-Profit > Volunteer > New



Email: Email field is the id of Member doctype.

Volunteer Type: Volunteer Type is link field to Volunteer Type Doctype. Volunteer can select available Doctype.

Address and Contact Section: This Section linked to address and contact doctypes.

Volunteer Availability Section: This section is child table which contains select field about volunteer availability. a volunteer can select availability such as weekly, morning etc.

Volunteer Skills Section: This section is child table which contains data field about the volunteer skills. a volunteer can add multiple skill for e.g. Desk Job, Hospitality, Food management, computer operator etc.

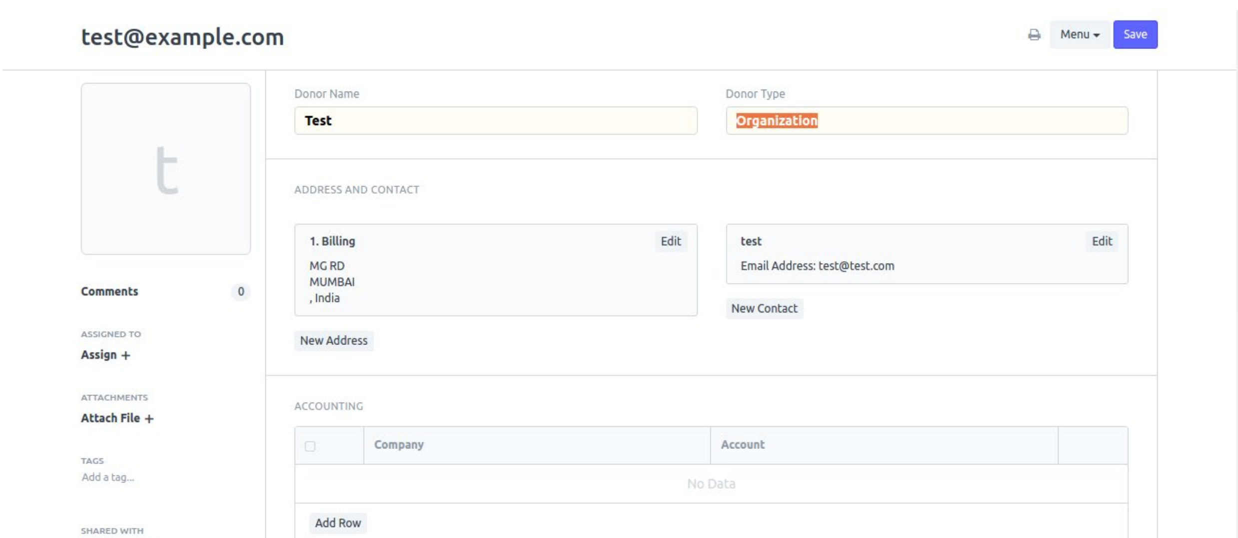
3. Donor

A donor in general is a person, organization or government who donates something voluntarily. The term is usually used to represent a form of pure altruism but sometimes used when the payment for a service is recognized by all parties as representing less than the value of the donation and that the motivation is altruistic. In business law, a donor is someone who is giving the gift (law), and a donee the person receiving the gift.

The Donor doctype allows you to record the Donor details.

Donor are simply contacts in your ERP+ database with one or more Donation. The contact may be an individual, a household, an organization, or some other contact sub-type, but it is always a contact to which a donation is applied.

To create new Donor, go to: Non-Profit > Donor > New



Email: Email field is the id of Member doctype.

Donor Type: DonorType is link field to Donor Type Doctype. Member can select Available Doctype.

Address and Contact Section: This Section linked to address and contact doctypes.

Accounting Section: This section allowed to set member accounting details such as Account Receivable.

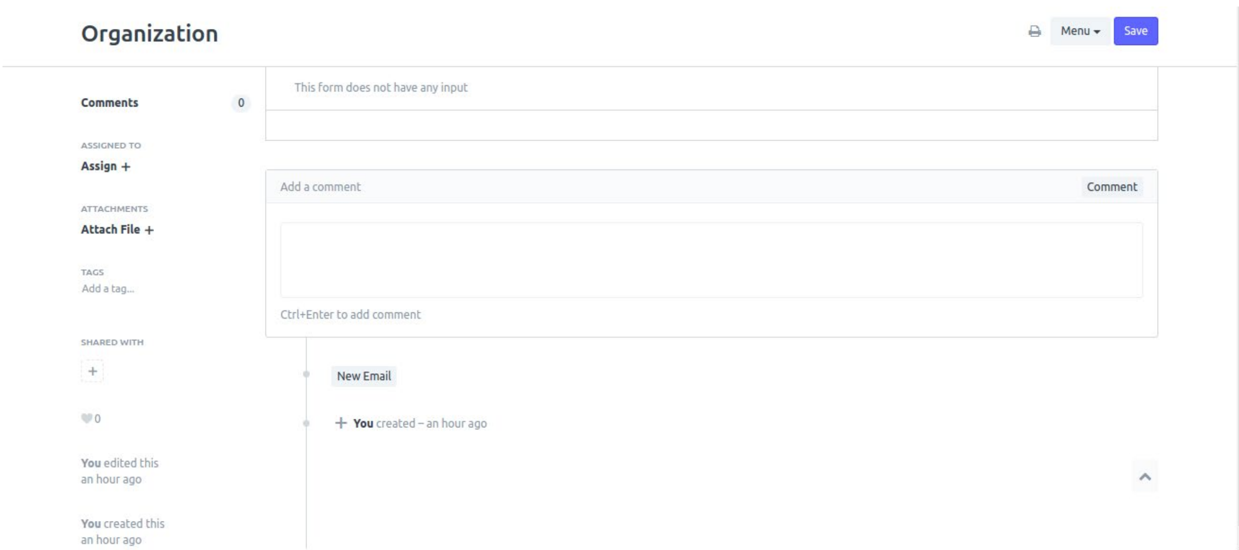
4. Donor Type

The Donor Type doctype allows you to Create different Donor Profile for the Donor.

Donor Types are a basic building block for Donor and contribution management. Typically, an organization will set up a donor type for each of the different donation that they offer. For example, an organization may define three donation types for 'regular', 'Organization', and 'honorary' donor.

In this chapter we will cover the most common set-up for donor types.

To create new donor Type, go to: Non-Profit > Donor Type > New



Donor Type: The Donor Type is displayed throughout the system, on both public and backend pages so spend some time thinking about a donor type name that is appropriate to both audiences. It can be changed at a later date.

1.3 Topic: Grant and Chapter

1. Grant Application
2. Chapter

1. Grant Application

Grant Application is designed to be used by organizations that distribute funds to others, for example grant seeker, etc.

Grants are non-repayable funds or products disbursed or gifted by one party (Grantmakers), often a government department, corporation, foundation or trust, to a recipient, often (but not always) a nonprofit entity, educational institution, business or an individual. In order to receive a grant, some form of "Grant Writing" often referred to as either a proposal or an application is required.

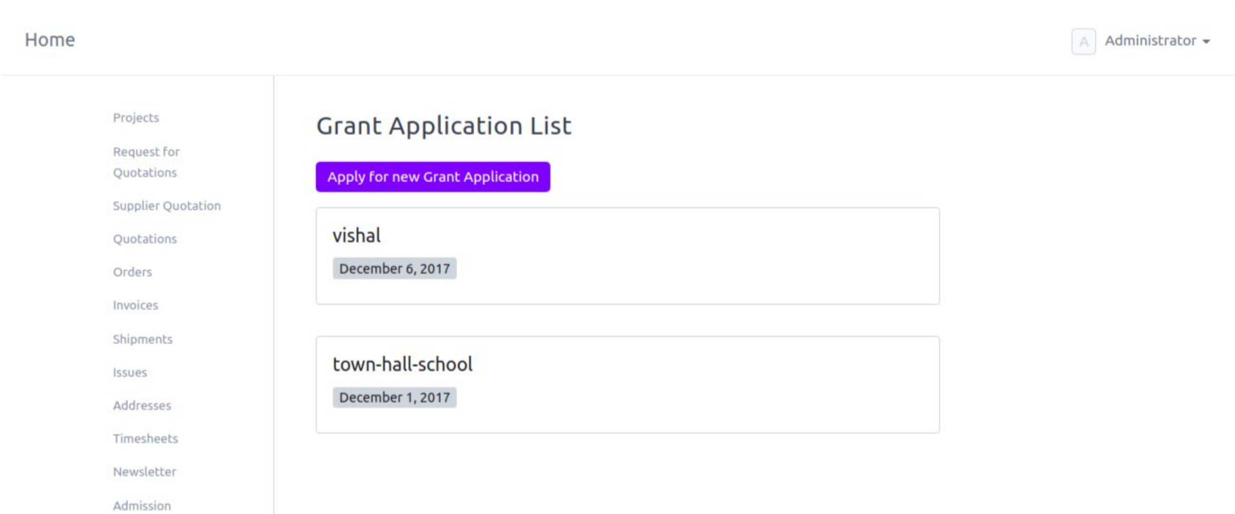
Most grants are made to fund a specific project and require some level of compliance and reporting.

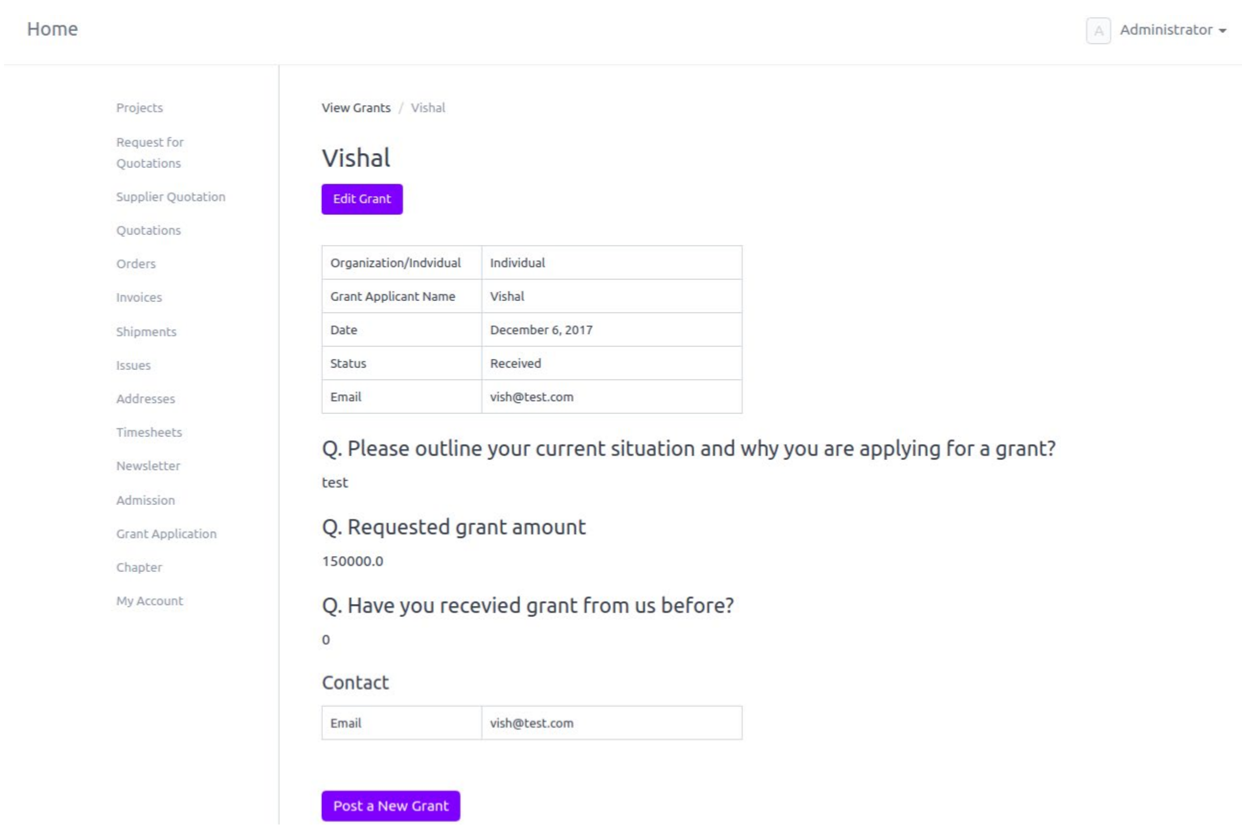
The grant writing process involves an applicant submitting a proposal (or submission) to a potential funder, either on the applicant's own initiative or in response to a Request for Proposal from the funder. Other grants can be given to individuals, such as victims of natural disasters or individuals who seek to open a small business. Sometimes grant makers require grant seekers to have some form of tax-exempt status, be a registered nonprofit organization or a local government.

Grant Application is grant writing process which can be review by assessment manager and then decided by the organization to disburse grant amount to the applicant or not.

The Grant Application doctype allows you to record the Grant Applicants details.

To Generate Online Grant Application, go to: My Account on website > Grant Application from sidebar > Apply for new Grant Application.





Home
Administrator
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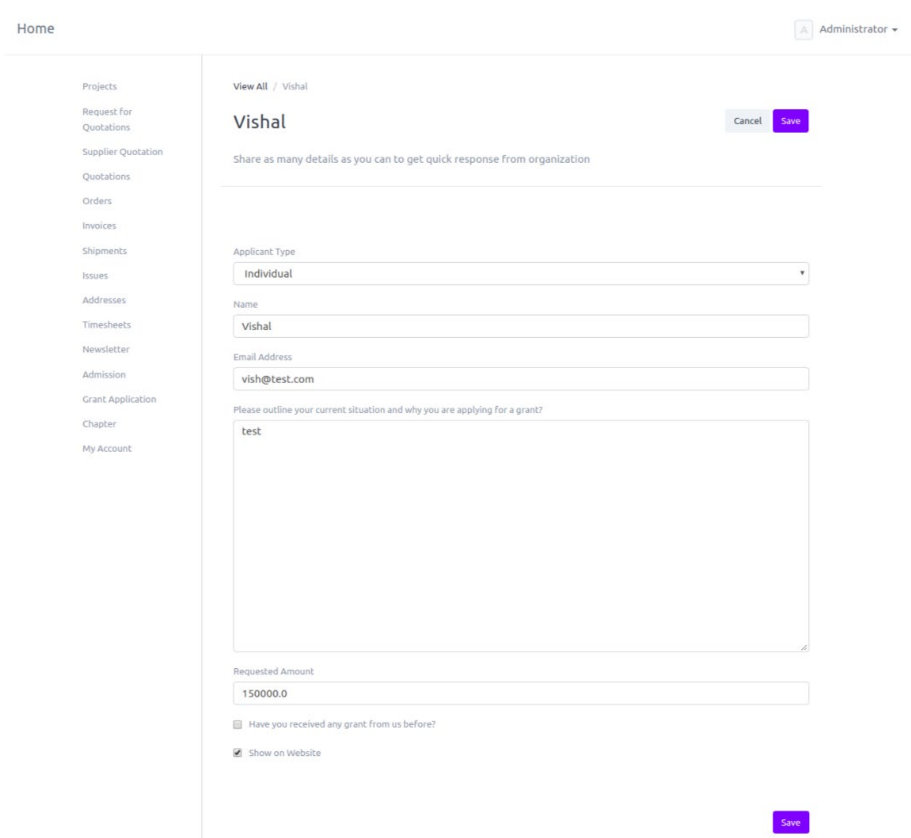
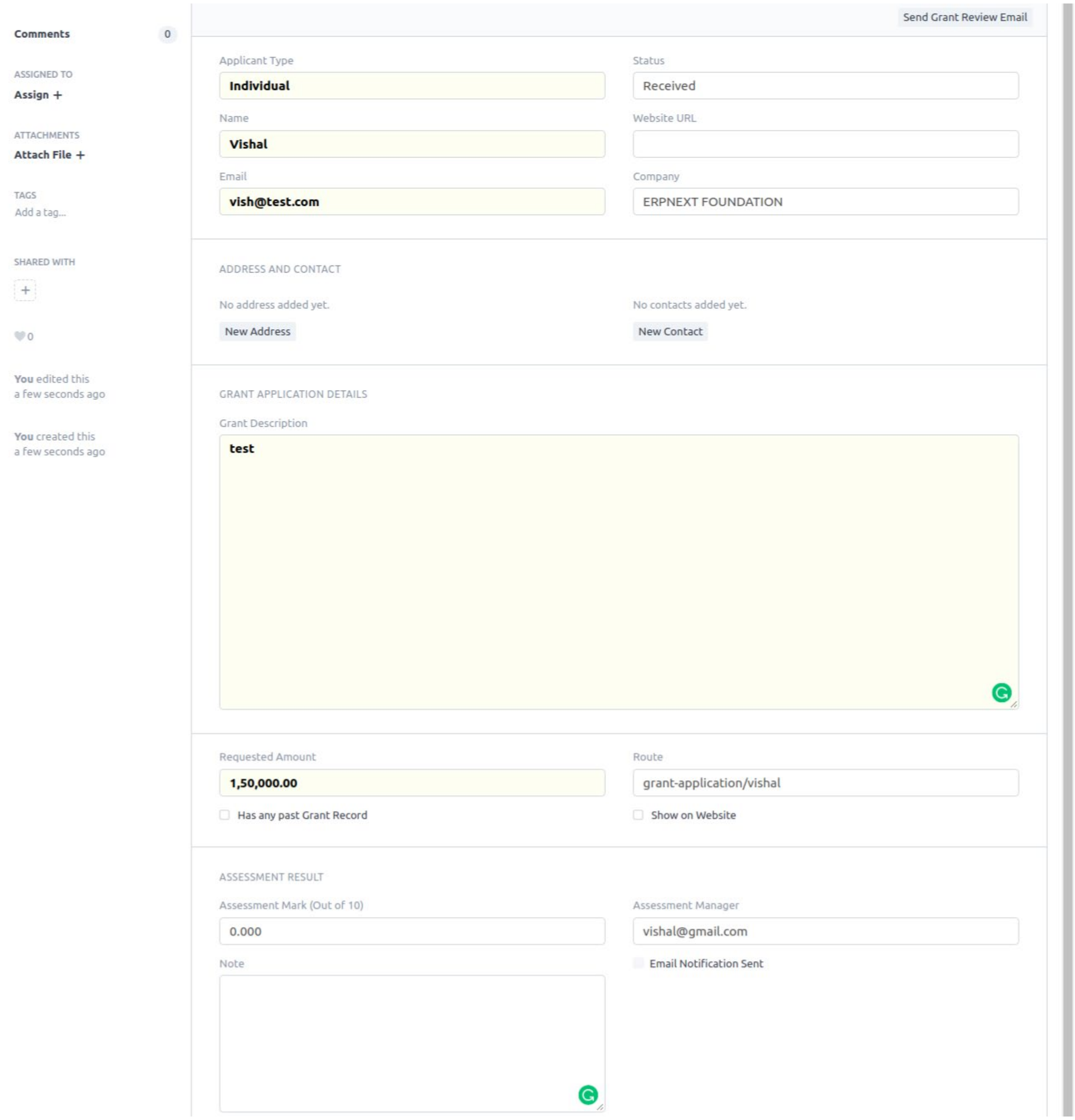
Invoices
Shipments
Issues
Addresses
Timesheets
Newsletter
Admission
Grant Application
Chapter
My Account
View Grants / Vishal
Vishal
Edit Grant
Organization/Indvidual Individual
Grant Applicant Name Vishal
Date December 6, 2017
Status Received
Email vish@test.com
Q. Please outline your current situation and why you are applying for a grant?
test
Q. Requested grant amount
150000.0
Q. Have you recevied grant from us before?
0
Contact
Email vish@test.com
Post a New Grant



Home
Administrator
Projects
Request for Quotations
Supplier Quotation
Quotations
Orders
Invoices
Shipments
Issues
Addresses
Timesheets
Newsletter
Admission
Grant Application
Chapter
My Account
View All / Vishal
Vishal
Cancel
Save
Share as many details as you can to get quick response from organization
Applicant Type
Individual
Name
Vishal
Email Address
vish@test.com
Please outline your current situation and why you are applying for a grant?
test
Requested Amount
150000.0
Have you received any grant from us before?
Show on Website
Save

To Generate Grant Application, go to: Non-Profit > Grant Application > New.



Email: Email is a mandatory field.

Organization: Organization is data field contain organization name set as name field in ERP+.

Address and Contact Section: This Section linked to address and contact doctypes.

Grant Application Details Section: This section contains information about grant description.

Amount: Amount field describe requested amount by an applicant.

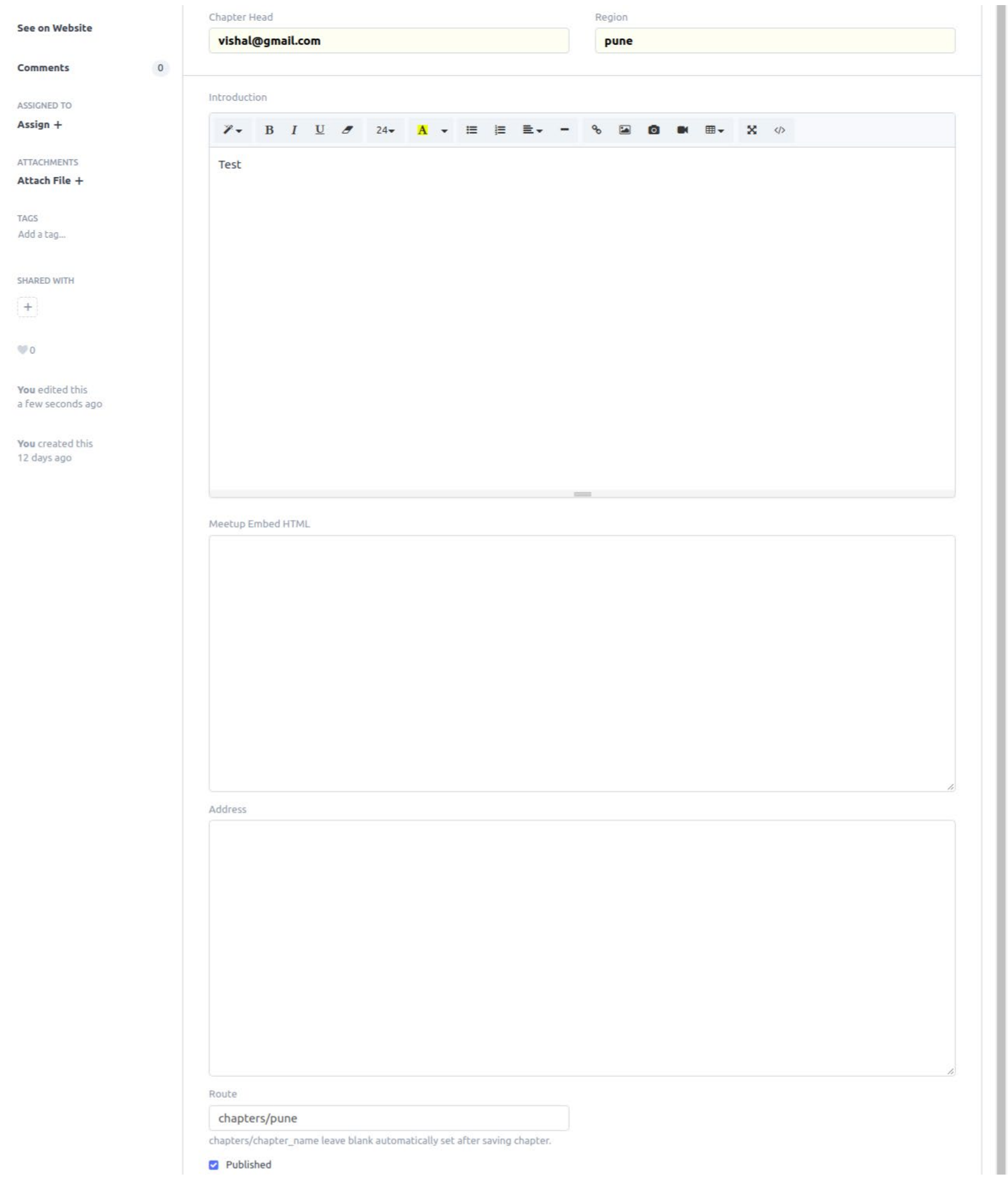
Route: Route field leave blank it will automatically create route path grant-application/organization_name

Assessment Result Section: In This section when status field selected as received, send Grant Review Email button appear on the top right corner which sends grant URL to Assessment Manager.

After reviewing grant. Grant Assessment Manager scale application at 0 - 9 point and left a note about a grant.

2. Chapter

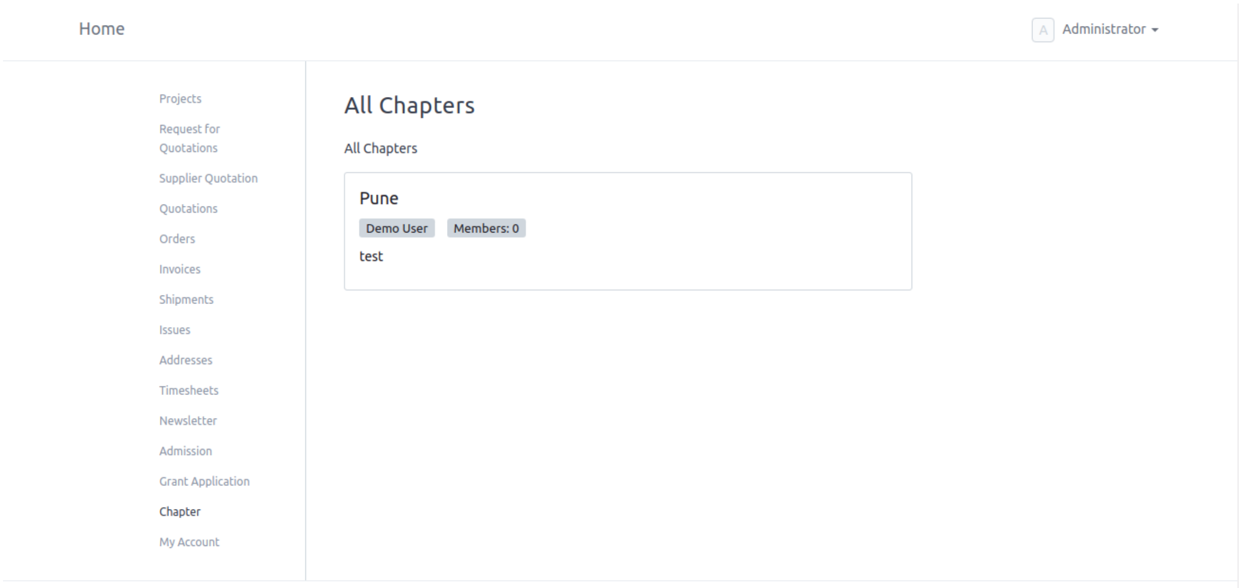
The Chapter doctype allows you to record the Chapter details. Chapter Head or System User can create Chapter. To Create Chapter: Non-Profit > Chapter > New

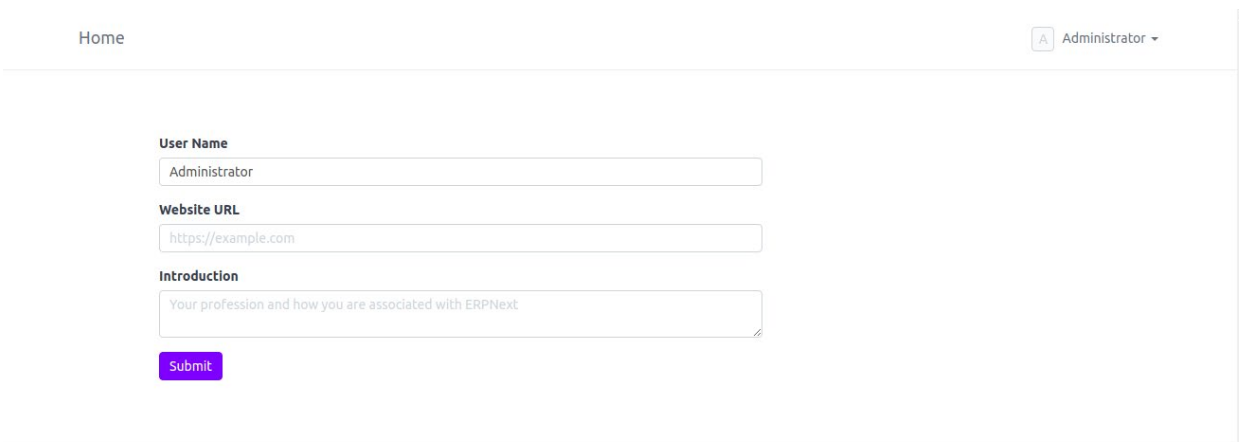


System User or Chapter Head can add chapter Member directly from the desk or User can join directly by visiting chapter page on website.

To join chapter online

My Account on website > Chapter from sidebar > Select Available chapter and click on join chapter button





To leave chapter click on leave chapter button.