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ERPNext Implementation Proposal

1. Executive summary

Fulbright Sri Lanka currently uses Salesforce for CRM, QuickBooks for accounting, and manual processes for much of its programme and administrative work. Finance, HR, operations, and award management are not held in a single system.

This proposal covers implementation of ERPNext as Fulbright's primary operating platform, including migration of agreed data from Salesforce and QuickBooks, and a custom application for grant and scholarship programme management.

Item	Summary
Delivery	5 weeks
Implementation	USD []
Maintenance	Year 1 included · USD 1,000 per year from Year 2
Hosting	In-house or client cloud: no charge · Our managed cloud: USD 100 per year

Retaining Salesforce and/or QuickBooks as ongoing systems after go-live is optional and can be included in this quotation if selected.

2. Understanding of requirements

Current environment

Fulbright Sri Lanka uses Salesforce for CRM and QuickBooks for accounting. Programme administration, HR, purchasing, expenses, and reporting rely heavily on spreadsheets, email, and manual follow-up. Stipend and daily-rate calculations are handled outside the core systems.

Requirements

- **Finance and accounting:** Replace QuickBooks with ERPNext and maintain programme and cost-centre visibility.
- **CRM:** Migrate Salesforce contacts and organisations into ERPNext.
- **Programmes and scholarships:** Manage applications, documents, review, awards, and payments in one workflow.
- **Stipends and daily rates:** Update rates from agreed external sources rather than manual lookup.
- **HR:** Hold employee records, leave, and staff recruitment in the same platform.
- **Purchasing and expenses:** Replace email-based requests with defined approval paths.
- **Reporting:** Produce programme and finance reports without manual consolidation.
- **Hosting:** Deploy where Fulbright chooses (in-house, its own cloud, or our managed cloud).

Objectives

- Consolidate finance, HR, and operations onto one platform
- Complete a verified migration before retiring existing tools
- Support grant and scholarship workflows end to end
- Keep ongoing costs predictable for a non-profit organisation

3. Why ERPNext

Fulbright needs one platform for finance, HR, operations, and custom grant and scholarship workflows, with predictable cost for a non-profit. ERPNext is our recommended choice for that combination.

Why ERPNext fits Fulbright

- **Unified platform:** Finance, CRM, HR, purchasing, expenses, and custom applications run on one Frappe-based stack, rather than stitching together separate products.
- **Custom programme fit:** The Fulbright grant and scholarship application can be built as a native extension on the same platform as accounting and HR, with shared contacts, approvals, and reporting.
- **Predictable cost:** ERPNext is open source. There is no vendor per-user subscription under this proposal. Ongoing cost is maintenance and optional hosting, not rising licence fees as staff or modules grow.
- **No third-party lock-in:** Core finance, HR, and programme data do not have to sit with an external ERP vendor. Fulbright chooses where the platform runs and who has access.
- **Data and control:** If required, data can stay in-house or on Fulbright's own cloud, in a preferred country or region. Fulbright retains full control over access, backups, upgrades, and retention.
- **More features without licence fees:** Built-in capabilities such as website pages, web forms, and surveys can be added on the same platform when needed, without separate module subscriptions.
- **Practical delivery:** A focused 5-week implementation is achievable because core ERPNext modules cover Fulbright's standard needs, with custom work concentrated on the programme application.
- **Open-source community and security:** ERPNext is supported by one of the largest open-source ERP communities, with over 20,000 active developers worldwide. The codebase is continually reviewed for security and quality by contributors across the world.

Compared with Odoo and other options

- **Odoo:** Covers many of the same areas and can be extended, but meaningful use of finance, HR, and CRM together often depends on paid Enterprise apps and per-user licensing. Custom grant and award workflows are typically larger build and integration efforts. Total cost and timeline for Fulbright's programme requirements are usually higher than an equivalent ERPNext implementation.
- **Salesforce and QuickBooks (status quo):** Addresses individual functions but not the objective of one verified platform. Both carry ongoing subscription costs if retained long term, and programme work still sits outside them in spreadsheets and email.
- **Larger suites (for example NetSuite or SAP):** Generally more than Fulbright needs at this stage: higher licence, implementation, and specialist support cost for capabilities that would largely stay unused.

ERPNext is proposed here because it matches Fulbright's scope, budget, and need for a tailored programme application without ongoing per-user ERP licensing.

4. Proposed solution and approach

ERPNext will provide finance, CRM, HR, purchasing, expenses, budgets, assets, and document management. A custom Fulbright programme application will manage award cycles, applications, document verification, review, awards, stipend schedules, and rate updates.

Salesforce and QuickBooks will remain available during migration for extraction and verification. Daily use moves to ERPNext only after Fulbright has accepted the migrated data.

Approach

1. **Connect.** Keep Salesforce and QuickBooks available while migration connections are set up.
2. **Migrate.** Transfer agreed data into ERPNext, including accounts, contacts, vendors, balances, and programme structures.
3. **Verify.** Fulbright reviews migrated records and key reports against the existing systems before cutover.
4. **Cut over.** Move daily work to ERPNext, train users, and retire Salesforce and QuickBooks from operations.

The detailed schedule and milestones are set out in Section 6.

Hosting

Option	Charge
In-house (Fulbright infrastructure)	None
Client cloud provider	None
Our managed cloud (preferred country or region)	USD 100 / year

5. Scope of work

Finance and accounting

Chart of accounts, general ledger, accounts payable and receivable, bank and cash, journals, financial statements, and allocation by programme or cost centre. Sri Lanka statutory requirements to be confirmed in Week 1.

Procurement and expenses

Vendor records, purchase requests and orders, approval workflows, expense claims with supporting documents, and reimbursement posting.

HR

Employee records, organisation structure, staff recruitment, leave management, basic self-service, and role-based access.

Fulbright programme application

- Programme and grant records
- Award cycles and intake windows
- Applications and document checklists
- Document status tracking
- Review assignment and decision history
- Award recording and audit trail
- Stipend and allowance schedules
- Automated stipend / daily-rate updates from agreed sources, with rate history
- Programme pipeline and utilisation reports

Note: The programme application scope above is indicative. Detailed requirements will be confirmed during Week 1 discovery and signed off before build.

Migration and cutover

Extraction from Salesforce and QuickBooks, data cleansing support, import, joint verification, training, go-live, and short hypercare period. Volume of historical data to be agreed in Week 1.

Optional items (included in this quotation if selected)

Payroll, public applicant portal, and long-term retention of Salesforce or QuickBooks.

6. Timeline and milestones

5. **Week 1, Discovery.** Workshops on finance, HR, programme, and admin work currently handled in spreadsheets and email. Confirm Fulbright programme application scope (grants, scholarships, applications, review, awards, stipends, and rate sync). Define approval workflows for purchasing, expenses, and programme steps. Agree hosting, migration scope from Salesforce and QuickBooks, and signed scope for build.
6. **Week 2, Configuration and build.** Configure ERPNext for finance, CRM, HR, purchasing, and expenses. Build the Fulbright programme application and programme-specific workflows. Set up purchase and expense approval paths to replace email-based requests. Prepare migration connections to Salesforce and QuickBooks.
7. **Weeks 2–3, Migration and testing.** Transfer master data, opening balances, and agreed historical records from Salesforce and QuickBooks. Import agreed programme structures and reference data from spreadsheets where applicable. Configure stipend and daily-rate updates from agreed sources. Staging environment live; internal testing of finance, HR, and programme workflows.
8. **Week 4, User acceptance.** Fulbright tests end-to-end workflows, including the programme application, approvals, and reporting. Verify migrated records and key reports against Salesforce, QuickBooks, and agreed spreadsheet baselines. UAT sign-off.
9. **Week 5, Go-live.** User training on ERPNext and the programme application. Production cutover: daily work moves to ERPNext and off spreadsheets, email-based requests, Salesforce, and QuickBooks. Hypercare and initial support.

Week	Milestone
1	Scope confirmed
2	System demonstration
3	Testing complete
4	UAT accepted
5	Live on ERPNext

Duration: 5 weeks, subject to Fulbright availability for workshops, testing, and access to source systems.

7. Commercial quotation

Currency: USD.

Line item	Amount
Discovery, implementation, and customisation	Included
Fulbright programme application and rate sync	Included
Data migration (Salesforce and QuickBooks)	Included
Testing, UAT support, training, and go-live	Included
Implementation total	USD 12,000
Maintenance — Year 1	Included
Maintenance — from Year 2	1,000 / year
Hosting — in-house	None
Hosting — client cloud	None
Hosting — our managed cloud	100 / year

ERPNext is open-source software. There is no ERP vendor subscription or per-user licence fee under this proposal. Costs are implementation, hosting (if using our cloud), and maintenance from Year 2.

Payment schedule

Milestone	Share	Due
Kick-off	40%	Contract signing / Week 1 start
UAT start	40%	Week 4
Go-live	20%	Cutover complete

Year 1 maintenance covers functional support, routine configuration guidance, minor issues, and update advice. From Year 2, the same cover continues at USD 1,000 per year.

Not included: major new features, substantial custom development after go-live, third-party licences, and infrastructure charges from Fulbright's own cloud provider (if applicable).

8. Assumptions and exclusions

Assumptions

10. **1.** Fulbright provides access to Salesforce, QuickBooks, and nominated stakeholders within the project window.
11. **2.** Historical migration depth is agreed in Week 1.
12. **3.** Standard ERPNext features are used wherever suitable.
13. **4.** Implementation covers one legal entity (US-SLFC) unless otherwise agreed.
14. **5.** Fulbright nominates a project owner and UAT participants.

Exclusions

- Hardware for in-house hosting
- Historical data beyond the agreed migration scope
- Third-party software licences
- Items not selected from the optional list above

9. Terms and conditions

Validity: 30 days from the date of this proposal.

Payment: Invoices issued per the schedule above; payment within 14 days of invoice.

Change requests: Material changes after Week 1 sign-off will be documented and priced before work proceeds.

Intellectual property: Custom application work developed for Fulbright is licensed for Fulbright's internal use on full payment. ERPNext and Frappe remain open source. Pre-existing 2xdev, inc frameworks remain our property unless agreed otherwise in writing.

Liability: Limited to fees paid under the statement of work, except where prohibited by law. Fulbright remains responsible for its statutory, tax, and legal compliance decisions.

Confidentiality: Both parties will treat non-public information as confidential.

10. Company profile

2xdev, inc

Our team members have cofounded, delivered, and supported platform work for global education and operations clients, through Global and related engagements, and on direct product builds.

Selected work includes:

- **Schoolze:** education platform; cofounded and delivered operational systems and product infrastructure
- **NewCampus:** global campus and learning operations; platform implementation and custom development
- **Verve Education:** education systems build, integration, and platform support
- **UseBaked:** product platform and operational systems delivery

This background is relevant to Fulbright in programme workflows, finance and operations on one platform, custom ERPNext modules, and controlled migration cutover.

11. Next steps

To proceed, we suggest the following sequence:

15. **Proposal review.** Fulbright reviews this document with finance, programme, and IT stakeholders. 2xdev, inc is available for a walkthrough call to answer questions.
16. **Confirm decisions before kick-off.** Hosting: in-house, client cloud, or our managed cloud (and preferred country or region). Migration depth: how much Salesforce, QuickBooks, and historical data to move. Optional items: payroll, public applicant portal, or long-term retention of Salesforce / QuickBooks.
17. **Acceptance.** Both parties sign below (or Fulbright issues a purchase order / contract referencing FB-ERP-2026-01).
18. **Week 1, Discovery.** Fulbright nominates a project owner and process leads, and provides access to Salesforce and QuickBooks. Joint workshops confirm detailed programme scope, migration plan, and signed scope for build.
19. **Weeks 2–5, Delivery.** Implementation proceeds per the timeline in Section 6, with milestone payments as set out in Section 7.

Upon acceptance, we will confirm the kick-off date and share a brief discovery agenda.

Proposal acceptance

This draft is for evaluation. A final statement of work will be issued after discovery confirmation.

For Fulbright Sri Lanka	For 2xdev, inc
NAME	NAME
DESIGNATION	DESIGNATION
SIGNATURE	SIGNATURE
DATE	DATE

12. Resources and links

Further material for review, demo access, and independent ERPNext comparisons.

This proposal

Presentation and proposal walkthrough: <http://fullbright-erp.the2x.dev/>

Live demo

ERPNext demo environment: <https://erpdemo.the2x.dev>

ERPNext comparisons (Frappe)

- ERPNext vs Odoo: <https://frappe.io/erpnext/comparisons/erpnext-vs-odoo>
- ERPNext vs QuickBooks: <https://frappe.io/erpnext/comparisons/erpnext-vs-quickbooks>
- ERPNext vs Salesforce: <https://frappe.io/erpnext/comparisons/erpnext-vs-salesforce>