



WHITE PAPER

Your QMS Is Already in Your ERP: Building an ISO-Style Quality System in ERPNext

ERPNext ships a full quality-management module — goals, procedures, reviews, non-conformances and CAPA — that most buyers never switch on.

For quality & operations leaders · 9 min read

EXECUTIVE SUMMARY

Most companies that run ERPNext are also quietly running a second, parallel quality system — a folder of Word SOPs, an audit tracker in Excel, a WhatsApp group for defects, and a corrective-action log nobody trusts. Meanwhile, sitting unused inside the same ERPNext they already own is a proper Quality Management module: quality goals with measurable objectives, standard operating procedures, scheduled reviews, non-conformance reports, and corrective/preventive quality actions (CAPA) with tracked resolutions — plus quality meetings and structured feedback. It is not a marketing feature; these are real ERPNext doctypes with defined fields and workflows. This paper walks through each piece, shows how they connect into a closed loop, and explains how that loop maps onto the intent of ISO 9001 — so you can decide whether to retire the parallel system and run quality where your operational data already lives.

The hidden QMS inside ERPNext

Ask most ERPNext users what the system does and you'll hear accounting, inventory, manufacturing, HR. Almost nobody says quality management — yet ERPNext ships a dedicated Quality module, and it is more complete than most people assume. It isn't a bolt-on or a paid add-on; it is a set of built-in doctypes designed to work together: Quality Goal, Quality Procedure, Quality Review, Non Conformance, Quality Action, Quality Meeting and Quality Feedback.

The reason it goes unnoticed is that quality lives in a different world from the transactions people log every day. So the SOPs end up in a shared drive, the audit findings in a spreadsheet, and the corrective actions in email — three disconnected systems that never reconcile. The pitch of this paper is simple: you have already paid for a quality system that sits next to your orders, stock and production data. Turning it on means your goals, procedures, findings and fixes stop being paperwork and start being records in the same database as the work they govern.

- Quality Goal & Quality Goal Objective — what 'good' means, made measurable.
- Quality Procedure — your standard operating procedures (SOPs), structured and hierarchical.
- Quality Review — periodic checks of actual performance against each objective.
- Non Conformance — a logged observation that a procedure wasn't followed.
- Quality Action & Quality Action Resolution — corrective and preventive actions (CAPA) with owners.
- Quality Meeting & Quality Feedback — management review and structured stakeholder input.

The ERPNext Quality module, piece by piece

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Quality Goal & Objective

measurable quality targets with a value, a unit of measure and a monitoring frequency.

2**Quality Procedure**

your SOPs, structured as an owned, hierarchical tree of processes and sub-procedures.

3**Quality Review**

a scheduled assessment of actual performance against each objective, marked Passed or Failed.

4**Non Conformance**

an observation, logged by anyone, that a procedure wasn't followed, with corrective/preventive notes.

5**Quality Action (CAPA)**

corrective or preventive actions with a table of dated, owned, individually-closable resolutions.

6**Quality Meeting & Feedback**

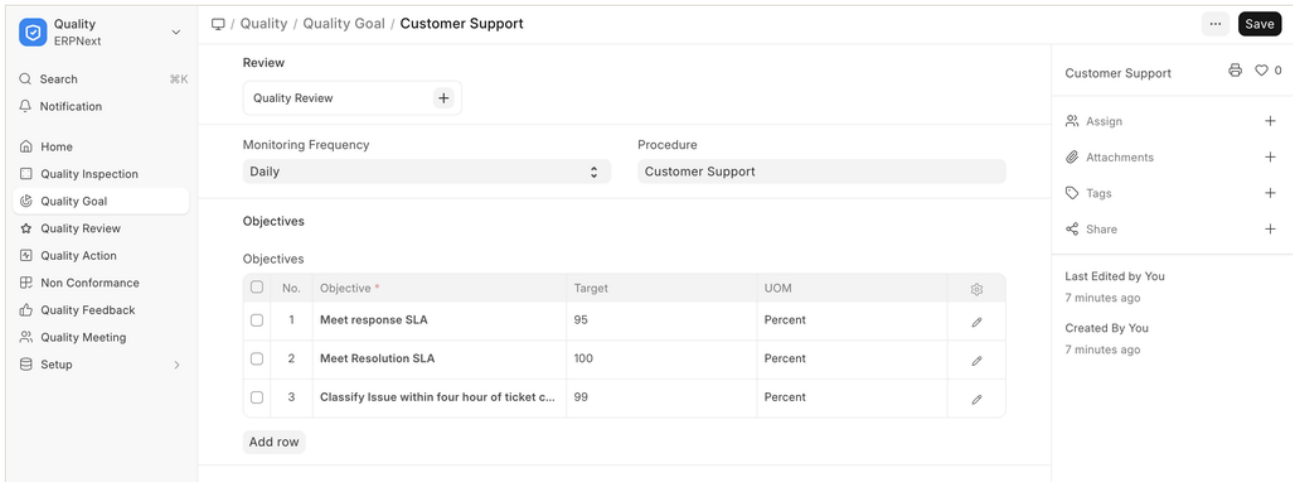
management review (agenda + minutes) and rated, template-driven stakeholder feedback.

Quality goals and objectives: making 'good' measurable

Every quality system starts by defining what good looks like, and ERPNext models this with the Quality Goal. A goal is a named target — 'Customer Support', say — that carries a set of Quality Goal Objectives underneath it. Each objective is a concrete, measurable line: an objective description, a target value, and a unit of measure (UOM). 'Meet response SLA — target 95, Percent.' 'Meet resolution SLA — target 100, Percent.' This is the difference between a vague aspiration and something you can actually audit.

What makes the goal more than a static wish list is its monitoring frequency. A Quality Goal can be set to Daily, Weekly, Monthly or Quarterly, and it links to the Quality Procedure that's meant to achieve it. That frequency is the heartbeat of the whole module: on the schedule you choose, ERPNext will prompt a review of actual performance against those targets — so the goal doesn't just sit in a document, it comes back around and asks to be checked.

- Quality Goal — a named target linked to the Quality Procedure meant to achieve it.
- Quality Goal Objective — each measurable line: objective, target value and unit of measure (UOM).
- Monitoring frequency — Daily, Weekly, Monthly or Quarterly drives the review cadence.
- The point: quality targets become measurable records, not a slide nobody revisits.



A Quality Goal in ERPNext — measurable objectives with targets and units, a monitoring frequency, and the linked procedure.

Procedures and reviews: SOPs that don't rot in a shared drive

The Quality Procedure is ERPNext's home for your standard operating procedures — the step-by-step way a task is meant to be done. A procedure has a name, a process owner, and a table of Processes, each with a process description. Crucially, procedures are hierarchical: a procedure can be marked as a group and contain sub-procedures, so a high-level 'Customer Support' procedure can branch into the detailed steps beneath it. This mirrors how real quality manuals are structured — a controlled document tree rather than a pile of loose files.

Procedures aren't the end of the story; they're meant to be measured, and that's what Quality Review does. A review is a point-in-time assessment tied to a procedure and its goal, carrying the same objectives with their targets — and now a place to record the actual result and a status of Open, Passed or Failed for each objective. Because a goal's monitoring frequency can generate these reviews on a cadence, the system nudges you to keep checking rather than reviewing quality only when something has already gone wrong. The result is an SOP library and an audit trail that live together and stay in sync.

- Quality Procedure — SOPs with a process owner and a Processes table of described steps.
- Hierarchical by design — a procedure can be a group of sub-procedures (a controlled document tree).
- Quality Review — assesses each objective against its target, with a Passed / Failed / Open status.
- Reviews follow the goal's frequency, so checking is scheduled, not just reactive.

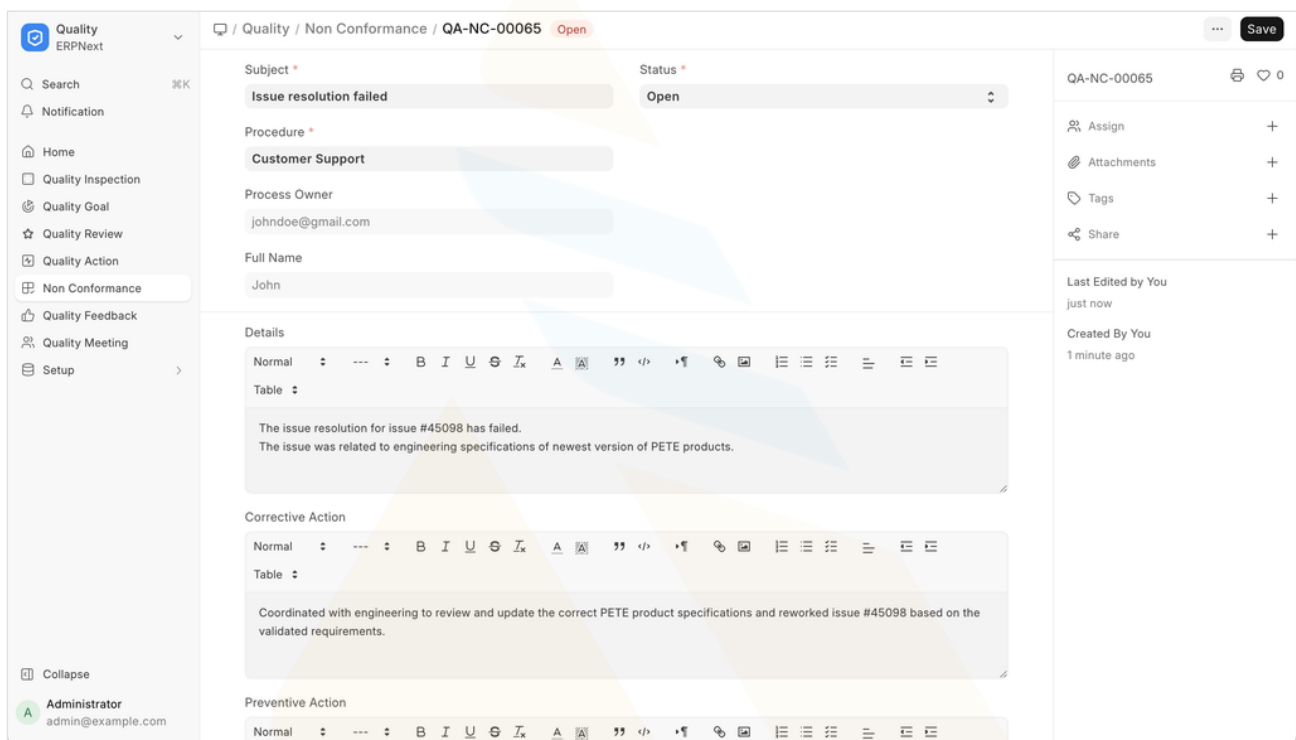
Non-conformance and CAPA: catching, fixing and preventing failures

When something doesn't go to plan, ERPNext captures it as a Non Conformance — an observation, filed by anyone in the organisation, that a specific procedure wasn't complied with. The record is deliberately simple so people actually use it: a subject, the procedure it relates to, the process owner, a details field describing what happened, and a status of Open, Resolved or Cancelled. It even carries corrective-action and preventive-action fields directly on the record, so the immediate response is captured at the point of observation.

For anything beyond a quick fix, ERPNext escalates to the Quality Action — its CAPA engine. A Quality

Action is explicitly flagged as Corrective or Preventive, links back to the Quality Review or Quality Feedback that triggered it, and holds a table of Quality Action Resolutions. Each resolution is a discrete task: the problem, the resolution, a responsible user, a completion-by date, and its own Open/Completed status. This is exactly the shape a CAPA process needs — not a single free-text box, but a set of assigned, dated, individually-closable actions. Corrective actions fix what went wrong; preventive actions stop it recurring; and both are tracked to closure against a named owner.

- Non Conformance — anyone can log that a procedure wasn't followed; status Open / Resolved / Cancelled.
- Corrective and preventive action fields sit on the non-conformance record itself.
- Quality Action — the CAPA record, flagged Corrective or Preventive, linked to its review or feedback.
- Quality Action Resolution — each fix as a task: problem, resolution, responsible user, due date, status.
- Every action closes against a named owner and a date — not a free-text box nobody revisits.



A Non Conformance in ERPNext — the subject, related procedure, details, and dedicated corrective and preventive action fields.

Quality meetings and feedback: closing the management loop

A quality system isn't only bottom-up findings; it needs the management-review rhythm too, and ERPNext provides it. The Quality Meeting records a meeting with an Agenda table and a Minutes table, and a simple Open/Closed status — the structured record that quality standards expect of periodic management reviews, kept in the same system as the goals and actions those meetings discuss.

On the input side, Quality Feedback captures structured voice-of-the-customer and internal feedback. It works from a Quality Feedback Template, and records feedback against a set of parameters — each with a rating (1 to 5) and a comment — attributed to a user or a customer. Because feedback can be the trigger for a Quality Action, the loop closes cleanly: feedback surfaces an issue, an action is raised to address it, resolutions are assigned and completed, and the meeting reviews it all. Everything a

management-review agenda needs is already a linked record, not a set of attachments emailed around before the call.

- Quality Meeting — Agenda and Minutes tables with an Open/Closed status for management reviews.
- Quality Feedback — template-driven, rated (1–5) parameters with comments, from a user or customer.
- Feedback can trigger a Quality Action, so voice-of-the-customer flows straight into CAPA.
- The whole loop — goal, review, finding, action, feedback, meeting — lives as linked records.

How this supports an ISO-9001-style system

ISO 9001 doesn't mandate software, but it does ask for specific, demonstrable things: a quality policy expressed as measurable objectives, controlled documented procedures, monitoring and measurement of performance, control of non-conforming outputs, corrective action, management review, and a bias toward continual improvement. Read that list against the ERPNext module and the mapping is striking — because the module was built with standards like ISO 9001 in mind.

Measurable objectives are Quality Goals and their Objectives. Documented procedures are Quality Procedures, hierarchical and owned. Monitoring and measurement is Quality Review on a defined frequency. Control of non-conforming work is Non Conformance. Corrective and preventive action is the Quality Action with its tracked resolutions. Management review is the Quality Meeting. Voice-of-the-customer is Quality Feedback. The point isn't that installing ERPNext makes you certified — certification is about how you actually run, audit and improve, and that's real organisational work. The point is that ERPNext gives you a coherent, auditable backbone for it, sitting in the same database as your operations, so your evidence is a by-product of running the business rather than a separate documentation exercise.

- Measurable quality objectives -> Quality Goal + Quality Goal Objective.
- Controlled documented procedures -> Quality Procedure (hierarchical, owned).
- Monitoring & measurement -> Quality Review on a set frequency.
- Control of non-conforming output -> Non Conformance.
- Corrective & preventive action -> Quality Action + Quality Action Resolution.
- Management review & customer feedback -> Quality Meeting + Quality Feedback.

Getting help turning it on

The module is genuinely capable, but a QMS is only as good as the way it's set up and adopted. The work that pays back is unglamorous: defining goals whose objectives are truly measurable, building a procedure tree that matches how you actually operate, choosing sensible review frequencies, and — most importantly — establishing the discipline that non-conformances get logged and quality actions get closed rather than quietly abandoned. Technology doesn't create a quality culture; it removes the friction that lets one decay.

As an official ERPNext partner working with Indian businesses, we help teams switch on the Quality module and shape it around their real processes — mapping goals and procedures, wiring reviews to the right cadence, and setting up the non-conformance and CAPA flow so it becomes a habit, not a

chore. If you're paying for a compliance system on the side while ERPNext's own quality module sits idle, the cheapest improvement available to you is to consolidate — and run quality where the rest of your business already lives.

KEY TAKEAWAYS

- 1 ERPNext ships a full Quality Management module — goals, procedures, reviews, non-conformances, CAPA, meetings and feedback — that most buyers never switch on.
- 2 Quality Goals make 'good' measurable (objective, target, UOM) and carry a Daily/Weekly/Monthly/Quarterly frequency that drives scheduled reviews.
- 3 Quality Procedures are hierarchical, owned SOPs; Quality Reviews check actual performance against each objective and mark it Passed or Failed.
- 4 Non Conformances capture what went wrong; Quality Actions run the CAPA loop as corrective or preventive fixes, each resolution owned and dated to closure.
- 5 The module maps cleanly onto ISO 9001's intent — measurable objectives, controlled procedures, monitoring, non-conformance control, CAPA and management review — giving you an auditable backbone next to your operational data.

FAQ

Does ERPNext have a built-in quality management system?

Yes. ERPNext ships a dedicated Quality module built from real doctypes — Quality Goal and Quality Goal Objective, Quality Procedure, Quality Review, Non Conformance, Quality Action and Quality Action Resolution, plus Quality Meeting and Quality Feedback. Together they cover measurable objectives, SOPs, scheduled reviews, non-conformance logging and corrective/preventive action (CAPA) — a coherent quality system that lives in the same database as your operations.

Can ERPNext handle CAPA (corrective and preventive actions)?

Yes. A Quality Action is ERPNext's CAPA record: it's explicitly flagged as Corrective or Preventive, links back to the Quality Review or Quality Feedback that triggered it, and holds a table of Quality Action Resolutions. Each resolution is a discrete task with a problem, a resolution, a responsible user, a completion-by date and its own Open/Completed status — so every action is assigned, dated and tracked to closure rather than sitting in a free-text box.

Does using ERPNext's quality module make my company ISO 9001 certified?

No — certification is about how you actually run, audit and improve your business, which is real organisational work no software can do for you. What ERPNext gives you is an auditable backbone that maps onto ISO 9001's intent: measurable objectives (Quality Goals), controlled documented procedures, monitoring and measurement (Quality Reviews), control of non-conforming output (Non Conformance), corrective and preventive action (Quality Action), and management review (Quality Meeting). Your evidence becomes a by-product of running the business.

How do quality goals, reviews and procedures connect in ERPNext?

A Quality Goal defines measurable objectives and links to the Quality Procedure meant to achieve them, with a monitoring frequency of Daily, Weekly, Monthly or Quarterly. On that cadence, Quality Reviews assess actual performance against each objective and mark it Passed or Failed. If a review or

feedback surfaces a problem, a Quality Action is raised to correct or prevent it, and a Non Conformance can be logged whenever a procedure isn't followed — so goals, procedures, reviews and actions form one closed loop.

Talk to a real ERPNext expert.

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