

**Your business case briefing and how to join Project One in your Rotary Club, District, Club trust or other Rotary entity**

**Rotary Oceania ERP (Flectra) Platform Development**

The Rotary Oceania ERP (Enterprise Resource Platform) was created in 2020. The system has recently been extensively updated to support more Clubs, trusts and other entities. The platform supports the beginning of what will become the Rotary Oceania website resource and replace the present Clubrunner zone website rotaryoceania.zone.

During 2021, many major events were supported on the ERP platform. Those events successfully combined

event management, marketing ticketing etc. The events provided a useful and extensive learning experience, The key learning was the need for national Rotary databases with tags for Rotary members, Alumni, Rotaract members, Interact members, supporters, donors, volunteers and more. Filters enabled special messaging to RYLA students, PHF recipients, and members or past members with 50 years of membership. The use of the integrated modules proved the case for what is now installed in the latest server build, including:

- 1) the framework and capability for national membership (clubs, Alumni, special programmes including Interact) with attribute records that can power communication and marketing of Rotary activities across Oceania.

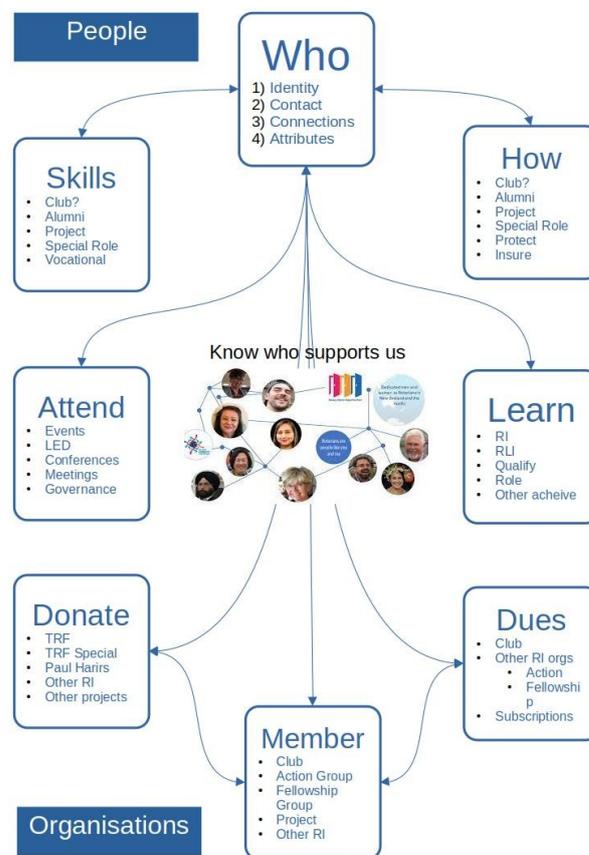
The system includes a 'drag and drop' website builder for all Clubs etc. The silo is over. Zone can be a useful reality.

- 2) Website templates for Clubs, trust and companies, Districts and other Rotary organisations will be developed to make adoption easier.
- 3) Installing and configuring Rotary Foundation other programme contributions, is supported by the DONATIONS accounting with automated receipting and customised reporting for the

donors, Districts and RISPPPO. This includes public "giving" pages.

- 4) Infrastructure for keeping track of required national police vetting records
- 5) A Rotary Travel and personal lines of insurance program is being developed to provide cover for the older age group of 75+ that current products do not support.
- 6) Building Use Cases for process improvement including how to engage new users and volunteers and how to make donation processing permitting different

charities and currencies:



**Use Case 1 NEW MEMBER - immediate engagement**

1. New member is added - this is the engagement point we so often just never get onto - new members "Join Rotary to change their lives ... but only stay if their lives are changed" RI research
2. RDU API establishes subscription and sends new member email link to latest online magazine
3. RI API establishes new member as user (remembering that this API already exists) and NEW MEMBER gets login credentials and an invite to explore the amazing stories etc on rotary.org
4. NEW MEMBER welcome comms #1 - membership info
5. NEW MEMBER welcome comms #2 - say anext day - gets info on interests established such as causes and opportunities with RAGS etc
6. NEW MEMBER welcome comms #3 - gets lemail link to the Learning Centre introductory course
7. NEW MEMBER welcome comms #4 - gets email from RLI on next courses
8. NEW MEMBER welcome comms #5 - gets email on upcoming events

..... what ever but it can be done - more feel the love!

**Use Case 2 MEMBERSHIP as a Rotarian**

With API's we can more effectively expose opportunities to RI events - if you want to go to GETS, Convention ... we can start building out processes so that people don't have to hunt or even remember so many websites

Enquires to [operations-manager@rotaryoceania.zone](mailto:operations-manager@rotaryoceania.zone)

First released 22 July 2021. See also ROZops Project One briefing which has been presented 5 times since 2019.

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**Flectra/Odoo? -the largest open source ERP system**

Open source ERP and CRM

**The Open Source ERP and CRM System For Your Business**



Flectra is the next generation business information system helps you grow your business , with powerful modular design covering all essential aspects of a business.

**Odoo - built by international companies - stats**

**A unique value proposition**  
Everything you need with a top-notch user experience.

Our family of apps work seamlessly together - giving you the ability to automate and track everything you do - centralized, online, and accessible from anywhere with any device.

The **open-source development model** of Odoo has allowed us to leverage thousands of developers and business experts to build the world's largest ecosystem of fully integrated business apps.

With a modern and elegant technical design, Odoo's framework is unique. It allows us and our community developers to provide **top-notch usability that scales across all apps**.

Usability improvements made to Odoo will be automatically applied to all of our integrated apps.

Finally, with regular annual releases, Odoo evolves much faster than any other solution.

**7 Million users**  
grow their business with Odoo

Flectra version of Odoo (version we use) = stats

**What Have We Achieved**

2M+ <b>Users</b>	100K+ <b>Companies</b>	125+ <b>Countries</b>
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The worldwide development community of over 3000 developer companies have created this:

**Sales**  
CRM, Sales, Point of Sale, Subscriptions, Rental

**Finance**  
Accounting, Invoicing, Expenses, Documents

**Marketing**  
Email Marketing, Surveys, Marketing, Events

**Inventory & MRP**  
Inventory, Manufacturing, Purchase, Maintenance, PLM

**Website**  
Website, eCommerce, Blogs, Forums, Live Chat, eLearning

**Human Resources**  
Employees, Recruitment, Time Off, Fleet

**Services**  
Helpdesk, Project, Timesheet, Appointments

**Productivity**  
Discuss, Delivery Easypost, DocuSign, Multi Approval, Signnow, No-Code Studio

And from those functions we have installed over 160 applications

Discuss, Calendar, Notes, Contacts, CRM, Sales, Website, Windcave Transactions, Documents, eLearning, Insurance Management, Members, Purchase, Inventory, Manufacturing, Donation, Accounting, Project, Timesheets, Email Marketing, Helpdesk, SMS Marketing, Events, Surveys, Employees, Recruitment, Expenses, Live Chat, Apps, Settings

**The benefits and how to join:**

1. access to all contacts , members. Volunteers with security control and audit
2. accounting for membership, events, assets and donations
3. credit AND debit card processing with multiple gateways
4. your website, newsletters, forum, blogs AND SMS
5. integrated project management
6. Club apps (in development)
7. free email accounts and more ...
8. **and to join simply email YES** to the email address below for a quote - from NZD45 per month

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