Using the ERP5 Configurator

Small and Medium Business

by [OSOE Project](#).

In this tutorial you are going to learn how to configure your ERP5 instance for your company using the ERP5 Configurator. By using Configurator, you can have an ERP5 ready to use in few minutes, just by filling a few forms and waiting for the automated setup to do the hard job for you.

Standard Configuration

This configurator tutorial aims to configure one ERP5 instance for Small and Medium Business, and it should cover the most basic configuration that a SMB needs, like, Trade, Accounting, Document Management and others.

The Standard Configuration contains a pre-defined set of categories, modules, security which focus the most common ERP configuration scope for small and medium company world-wide. This configuration is appropriated to experiment and train yourself to ERP5 or use in production where this ERP configuration fits to the company needs.

setTimeout	60000	
deleteCookie	LOCALIZER_LANGUAGE	
createCookie	LOCALIZER_LANGUAGE=en	
openAndWait	${base_url}/view	
store	${base_url}/portal_configurator	configurator_base_url
openAndWait	${base_url}/Zuite_setUpConfigurationTest	
verifyTextPresent	Init Ok	

Configure your Site
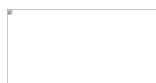
Use the "My favourites" Menu to select "Configure your Site" and start to configure your ERP5 Site. You will be redirected to the Configurator Tool.

Welcome to Configurator

This is the Initial Page of the configurator, at this stage you can select whatever Configuration that you prefer. For this tutorial we are going to select **SMALL AND MEDIUM BUSINESS**.

setTimeout	1200000
openAndWait	${base_url}/Zuite_waitForActivities
verifyTextPresent	Done.
setTimeout	120000
pause	4000
openAndWait	${configurator_base_url}/view
verifyTextPresent	ERP5 Configuration
verifyTextPresent	Welcome to Configurator
verifyTextPresent	This tool will help you configure your fresh ERP5
verifyTextPresent	Language
verifyTextPresent	ERP5 Configuration
clickAndWait	//button[@value='business_configuration_module/STANDARD_CONFIGURATOR_TEST']

Your Organisation
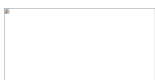
You will then have to fill all the information about your Company. It is important for you to enter the correct information as it wont be possible after the configuration to change them by yourself. Once it is done, just click on "Configure Organisation".

Note: You are configuring the ERP5 instance for your company, so please use the information of your company, such as Name, Email, Address, Country, and Users' information.

verifyTextPresent	ERP5 Configuration	
verifyTextPresent	Installation steps	
verifyTextPresent	Number of user accounts	
verifyTextPresent	User accounts configuration	
verifyTextPresent	Accounting	
verifyTextPresent	Application preferences	
verifyTextPresent	Download	
verifyTextPresent	Your organisation	
verifyTextPresent	What is the name of your company?	
verifyTextPresent	Email	
verifyTextPresent	Telephone	
verifyTextPresent	Street Address	
verifyTextPresent	Postal Code	
verifyTextPresent	City	
verifyTextPresent	Country	
verifyElementPresent	//input[@name="next:method"]	
verifyValue	//input[@name="next:method"]	Configure Organisation
type	//input[@name="field_your_title"]	Nexedi SA
type	//input[@name="field_your_default_email_text"]	webproject-report@erp5.org
type	//input[@name="field_your_default_telephone_text"]	+123 234 567 891
type	//textarea[@name="field_your_default_address_street_address"]	270 bd Clémenceau, 59700 Marcq-Baroeul
type	//input[@name="field_your_default_address_zip_code"]	59700
select	//select[@name="field_your_default_address_region"]	Europe/Western Europe/France

clickAndWait	//input[@name="next:method"]	
verifyTextPresent	Input is required but no input given.	
verifyValue	//input[@name="field_your_title"]	Nexedi SA
verifyValue	//input[@name="field_your_default_email_text"]	webproject-report@erp5.org
verifyValue	//input[@name="field_your_default_telephone_text"]	+123 234 567 891
verifyValue	//textarea[@name="field_your_default_address_street_address"]	270 bd Clémenceau, 59700 Marcq-Baroeul
verifyValue	//input[@name="field_your_default_address_zip_code"]	59700
verifyValue	//select[@name="field_your_default_address_region"]	europe/western_europe/france
type	//input[@name="field_your_default_address_city"]	Lille
clickAndWait	//input[@name="next:method"]	

Number of user accounts

You will then have to choose how many user accounts you want to create during the configuration. You will be able to create as many users as you want even after the configuration. So you don't have to configure all the persons of your organisation that will use ERP5 now. Click on "Configure user accounts number".

verifyTextPresent	ERP5 Configuration	
verifyTextPresent	Installation steps	
verifyTextPresent	Number of user accounts	
verifyTextPresent	User accounts configuration	
verifyTextPresent	Accounting	
verifyTextPresent	Application preferences	
verifyTextPresent	Download	
verifyTextPresent	Number of user accounts	

verifyTextPresent	Enter the number of user accounts you want to create. In your company, each person using ERP5 should have his own user account.	
verifyTextPresent	Select the number of user accounts you want to configure	
verifyElementPresent	//input[@name="next:method"]	
verifyValue	//input[@name="next:method"]	Configure user accounts nu
verifyValue	//input[@name="previous:method"]	Previous
verifyElementPresent	//input[@name="previous:method"]	
clickAndWait	//input[@name="previous:method"]	
verifyTextPresent	ERP5 Configuration	
verifyTextPresent	Installation steps	
verifyTextPresent	Number of user accounts	
verifyTextPresent	User accounts configuration	
verifyTextPresent	Accounting	
verifyTextPresent	Application preferences	
verifyTextPresent	Download	
verifyTextPresent	Your organisation	
verifyTextPresent	What is the name of your company?	
verifyTextPresent	Email	
verifyTextPresent	Telephone	
verifyTextPresent	Street Address	
verifyTextPresent	Postal Code	
verifyTextPresent	City	
verifyTextPresent	Country	
verifyElementPresent	//input[@name="next:method"]	

verifyValue	//input[@name="next:method"]	Configure Organisation
verifyValue	//input[@name="field_your_title"]	Nexedi SA
verifyValue	//input[@name="field_your_default_email_text"]	webproject-report@erp5.or
verifyValue	//input[@name="field_your_default_telephone_text"]	+123 234 567 891
verifyValue	//textarea[@name="field_your_default_address_street_addres s"]	270 bd Clémenceau, 5970(Marcq-en-Baroeul
verifyValue	//input[@name="field_your_default_address_zip_code"]	59700
verifyValue	//select[@name="field_your_default_address_region"]	europe/western_europe/fra
verifyValue	//input[@name="field_your_default_address_city"]	Lille
clickAndWait	//input[@name="next:method"]	
verifyTextPresent	ERP5 Configuration	
verifyTextPresent	Installation steps	
verifyTextPresent	Number of user accounts	
verifyTextPresent	User accounts configuration	
verifyTextPresent	Accounting	
verifyTextPresent	Application preferences	
verifyTextPresent	Download	
verifyTextPresent	Number of user accounts	
verifyTextPresent	Enter the number of user accounts you want to create. In your company, each person using ERP5 should have his own user account.	
verifyTextPresent	Select the number of user accounts you want to configure	
verifyElementPresen t	//input[@name="next:method"]	
verifyValue	//input[@name="next:method"]	Configure user accounts nt
verifyValue	//input[@name="previous:method"]	Previous
verifyElementPresen t	//input[@name="previous:method"]	

| select	//select[@name="field_your_company_employees_number"]	1
clickAndWait	//input[@name="next:method"]	

User accounts configuration

You will then have to fill in all the information for as many users as you selected before. **ATTENTION: Do NOT use the username "zope".** Please notice that in an online environment the useres will receive their login and password by email so be careful to enter the right email address. When it is done you can click on "Configure user accounts".

verifyTextPresent	ERP5 Configuration	
verifyTextPresent	Installation steps	
verifyTextPresent	Number of user accounts	
verifyTextPresent	User accounts configuration	
verifyTextPresent	Accounting	
verifyTextPresent	Application preferences	
verifyTextPresent	Download	
verifyTextPresent	User accounts configuration	
verifyTextPresent	Fill in detailled information for each ERP5 user.	
verifyTextPresent	User accounts configuration	
verifyTextPresent	Fill in detailled information for each ERP5 user.	
verifyTextPresent	First Name	
verifyTextPresent	Last Name	
verifyTextPresent	User Login	
verifyTextPresent	User Password	
verifyTextPresent	Password Confirmation	
verifyTextPresent	Function	

verifyElementPresent	//input[@name="next:method"]	
verifyValue	//input[@name="next:method"]	Configure user accounts
verifyValue	//input[@name="previous:method"]	Previous
verifyElementPresent	//input[@name="previous:method"]	
type	//input[@name="field_your_first_name"]	Ivan
type	//input[@name="field_your_last_name"]	Petrov
type	//input[@name="field_your_reference"]	PERSON_RESERVED_REFER
type	//input[@name="field_your_password"]	secret
type	//input[@name="field_your_password_confirm"]	secret
select	//select[@name="field_your_function"]	Company/Company Manager
type	//input[@name="field_your_default_email_text"]	webproject-report@erp5.org
clickAndWait	//input[@name="next:method"]	
verifyTextPresent	User login is either already used or contains invalid characters	
verifyTextPresent	Please try another one	
type	//input[@name="field_your_reference"]	PERSON_USER_REFERENCE
clickAndWait	//input[@name="next:method"]	

Accounting
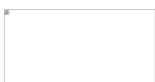
You will then have to choose the accounting plan you want to use (If the accounting plan that you want to use is not available, we can teach you how to make your accounting plan available in ERP5). Then you have to enter the accounting period beginning date, the ending date and the name of the accounting period. When it is done you can click on "Configure accounting".

verifyTextPresent	ERP5 Configuration	
verifyTextPresent	Installation steps	

verifyTextPresent	Number of user accounts	
verifyTextPresent	User accounts configuration	
verifyTextPresent	Accounting	
verifyTextPresent	Application preferences	
verifyTextPresent	Download	
verifyTextPresent	Accounting	
verifyTextPresent	Configure your accounting.	
verifyTextPresent	Which accouting plan do you use?	
verifyTextPresent	Accounting Period	
verifyTextPresent	Accounting Periods are used to define the range of dates in which you will be allowed to input accounting transactions.	
verifyTextPresent	To start using the system, you have to configure the first accounting period.	
verifyTextPresent	What is the begin date of your current accounting period?	
verifyTextPresent	What will be the end date of your current accounting period?	
verifyTextPresent	What is the name of this period?	
verifyElementPresent	//input[@name="next:method"]	
verifyValue	//input[@name="next:method"]	Configure accounting
verifyValue	//input[@name="previous:method"]	Previous
verifyElementPresent	//input[@name="previous:method"]	
verifyValue	//input[@name="subfield_field_your_period_start_date_year"]	2012
verifyValue	//input[@name="subfield_field_your_period_start_date_month"]	01
verifyValue	//input[@name="subfield_field_your_period_start_date_day"]	01
verifyValue	//input[@name="subfield_field_your_period_stop_date_year"]	2012
verifyValue	//input[@name="subfield_field_your_period_stop_date_month"]	12
verifyValue	//input[@name="subfield_field_your_period_stop_date_day"]	31

verifyValue	//input[@name="field_your_period_title"]	2012
clickAndWait	//input[@name="next:method"]	

Application Preferences

You will then have to choose the "from" email address of your account. This email address will be used for automatically generated emails. You have to select the default accounting currency and the languages that you want to be available in your instance. English will always be available, other languages have to be installed during the configuration process. When it is done you can click on "Configure ERP5 Preferences".

verifyTextPresent	ERP5 Configuration	
verifyTextPresent	Installation steps	
verifyTextPresent	Number of user accounts	
verifyTextPresent	User accounts configuration	
verifyTextPresent	Accounting	
verifyTextPresent	Application preferences	
verifyTextPresent	Download	
verifyTextPresent	Application preferences	
verifyTextPresent	Define some global preferences for your ERP5 application.	
verifyTextPresent	What email address should be used as From email address for automatically generated emails?	
verifyTextPresent	What is the currency used in your company?	
verifyTextPresent	Which date format do you use?	
verifyTextPresent	Which translations do you want to use?	
verifyElementPresent	//input[@name="next:method"]	
verifyValue	//input[@name="next:method"]	Configure ERP5 Preferences

verifyValue	//input[@name="previous:method"]	Previous
verifyElementPresent	//input[@name="previous:method"]	
select	//select[@name="field_your_price_currency"]	Euro
select	//select[@name="field_your_preferred_date_order"]	Day / Month / Ye
addSelection	//select[@name="field_your_lang"]	label=French
clickAndWait	//input[@name="next:method"]	

Summary

This step is to say that we have all the information needed for the installation. It is still possible to go back and correct wrong information, but once you will have clicked on 'Install' it won't be possible anymore. When you are sure of the information you filled, you can click on "Install".

verifyTextPresent	ERP5 Configuration	
verifyTextPresent	Installation steps	
verifyTextPresent	Number of user accounts	
verifyTextPresent	User accounts configuration	
verifyTextPresent	Accounting	
verifyTextPresent	Application preferences	
verifyTextPresent	Download	
verifyTextPresent	Download	
verifyTextPresent	Installation procedure may begin	
verifyTextPresent	You are going to install your selected configuration.	
verifyTextPresent	Please proceed using Install button below.	
verifyTextPresent	In the next page you will receive automatically updated installation status report.	
verifyElementPresent	//input[@name="next:method"]	

| verifyValue	//input[@name="next:method"]	Install
verifyValue	//input[@name="previous:method"]	Previous
verifyElementPresent	//input[@name="previous:method"]	
clickAndWait	//input[@name="next:method"]	

Installation

You can follow the installation progress thanks to the "installation progress bar". Even if you quit the page, you won't be able to stop the installation process. Once it is done you will see a link at the end of the progress bar that will invite you to login to your ERP5 Instance. If you are running ERP5 in a virtual machine on a slow computer it could happen that you get a message "Error code 500". Don't worry, this only means that it takes a long time to configure ERP. In this case, just wait some more minutes and then return to your ERP5 instance (in the virtual machine you can do this by clicking the home button). Then you have to click "My Favourites" -> "Log out" to log out from the emergency user. Then you can log in again using your user you just created.

waitForCondition	selenium.isTextPresent("ERP5 configuration process is running.")	10000
verifyTextPresent	Please be patient and do not move from current page until you get	
verifyTextPresent	confirmation that the installation is over.	
verifyTextPresent	It will last approximately 5 to 10 minutes.	
setTimeout	1200000	
openAndWait	${base_url}/Zuite_waitForActivities	
verifyTextPresent	Done.	
setTimeout	30000	
openAndWait	${base_url}/Zuite_assertEndConfiguration	
verifyTextPresent	True	
openAndWait	${base_url}/view	
verifyTextPresent	${base_user}	

openAndWait	${base_url}/logout	
openAndWait	${base_url}/login_form	
type	//input[@name="__ac_name"]	PERSON_USER_REFERE
type	//input[@name="__ac_password"]	secret
clickAndWait	//input[@name="logged_in:method"]	
openAndWait	${base_url}/view	
verifyTextPresent	PERSON_USER_REFERENCE	
openAndWait	${base_url}/Zuite_waitForActivities	
verifyTextPresent	Done.	
setTimeout	30000	
openAndWait	${base_url}/login_form	
type	//input[@name="__ac_name"]	${base_user}
type	//input[@name="__ac_password"]	
clickAndWait	//input[@name="logged_in:method"]	

Start using your new ERP5 system
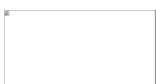
As soon the link is provided, click "Start using your new ERP5 system" to use your configured ERP5.

Login
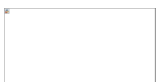
Now you can login with the user Login and Password created during the configuration and enjoy your ERP5.