

Using the ERP5 Configurator

Small and Medium Business

by [OSOE Project](#).

▼ Details

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

▼ Details

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.

Configure your Site



▼ Details

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

ERP5 Configuration

Welcome to Configurator

This tool will help you configure your fresh ERP5

Language

English

UNG



The UNG project aims at building a complete alternative to proprietary business ...

Configure

MAXMA DEMO



Maxma Demo is a pre-build configuration which the user can experiment the most ...

Configure

SMALL AND MEDIUM BUSINESS



Standard Configuration provides a generic configuration of ERP5 for Small and ...

Configure

ERP5 CONSULTING



Configure

RUN MY DOC



Configure

▼ Details

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**.

Your Organisation

ERP5 Configuration

Your organisation

Configure your organisation.

Installation steps

- Your organisation
- Number of user accounts
- User accounts configuration
- Accounting
- Application preferences
- Download

What is the name of your company?

Email

Telephone

Street Address

Postal Code

City

Country

Replace VIFIB with the company you created when you configured your ERP5 instance

VIFIB

jingjing.xu@toilive.com

+33123456789

15 rue Erlanger

75015

Paris

Europe/Western Europe/France

Configure Organisation

▼ Details

You will then have to fill all the information about your Company. It is important for you to enter the correct information as it won't 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.

Number of user accounts

ERP5 Configuration

Number of user accounts

Enter the number of user accounts you want to create. In your company, each person using ERP5 should have his own user account.

Installation steps

- Your organisation
- Number of user accounts**
- User accounts configuration
- Accounting
- Application preferences
- ERP5 installation

Select the number of user accounts you want to configure

▼ Details

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".

User accounts configuration

ERP5 Configuration

User accounts configuration

Fill in detailed information for each ERP5 user. At end of configuration process each TioLive user will receive an email containing his username and password.

Installation steps

- Your organisation
- Number of user accounts
- User accounts configuration**
- Accounting
- Application preferences
- Download

First Name	<input type="text" value="jingjing"/>	Email	<input type="text" value="jingjing.xu@tiolive.com"/>
Last Name	<input type="text" value="xu"/>	Telephone	<input type="text" value="+33654321987"/>
User Login	<input type="text" value="jingjing.xu"/>	Function	<input type="text" value="Company/Company Manager"/>
User Password	<input type="password" value="*****"/>		
Password Confirmation	<input type="password" value="*****"/>		

ATTENTION: Do not use "zope" as the User Login

▼ Details

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 users 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".

Accounting

ERP5 Configuration

Accounting

Configure your accounting.

Installation steps

- Your organisation
- Number of user accounts
- User accounts configuration
- **Accounting**
- Application preferences
- Download

Accounting Period

Accounting Periods are used to define the range of dates in which you will be allowed to input accounting transactions. To start using the system, you have to configure the first accounting period.

What is the name of this period?

What is the begin date of your current accounting period?

 / /

What will be the end date of your current accounting period?

 / /

Which accounting plan do you use?

[Previous](#) [Configure accounting](#)

▼ Details

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".

Application Preferences

ERP5 Configuration

Application preferences

Define some global preferences for your ERP5 application.

Installation steps

- Your organisation
- Number of user accounts
- User accounts configuration
- Accounting
- **Application preferences**
- ERP5 installation

What email address should be used as From email address for automatically generated emails?

What is the currency used in your company?

Which date format do you use?

Which translations do you want to use?

[Previous](#) [Configure ERP5 Preferences](#)

▼ Details

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".

Summary

ERP5 Configuration

Download

Installation procedure may begin.

Installation steps

- Your organisation
- Number of user accounts
- User accounts configuration
- Accounting
- Application preferences
- Download

All needed information is collected.

Please proceed using Install button below. In the next page you will receive automatically updated installation status report.

[Previous](#) [Install](#)

▼ Details

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".

Installation

ERP5 Configuration



ERP5 configuration process is running.

Please be patient and do not move from current page until you get confirmation that the installation is over. It will last approximately 5 to 10 minutes.

▼ Details

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.

Start using your new ERP5 system

ERP5 Configuration

Configuration is over. Enjoy your new ERP5 system!

Please click link below. You will be redirected to a form in which you can login using one of yours newly created ERP5 user accounts.

[Start using your new ERP5 system](#)

https://softinst18656.host.vifib.net:4443/erp5/login_form

▼ Details

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

Login

Mes favoris Modules Français Rechercher

ERP5 / Utilisateur : zope

Connexion

Nom

Mot de passe

Mémoriser mon nom

[J'ai oublié mon mot de passe !](#)

En cas de problème de connexion, vérifiez que vous avez autorisé les cookies dans votre navigateur.
Pensez à vous déconnecter ou à fermer votre navigateur lorsque vous aurez terminé.
Cocher la case "Mémoriser mon nom" autorise ERP5 à se souvenir de votre nom d'utilisateur afin de ne pas avoir à saisir cette information à chaque connexion.

▼ Details

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