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

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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

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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

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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.

Number of user accounts

▼ 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

▼ 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 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".

Accounting

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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

▼ 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

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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

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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

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

Login

▼ Details

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