

ERP OS - Quick Start Guide

After finishing the setup you can follow this quick start guide to start working with ERP OS.

STEP 01 - Login

Already an admin and staff account has been created. You can just log in using username: admin, password: admin. After login change your username and password.

Login

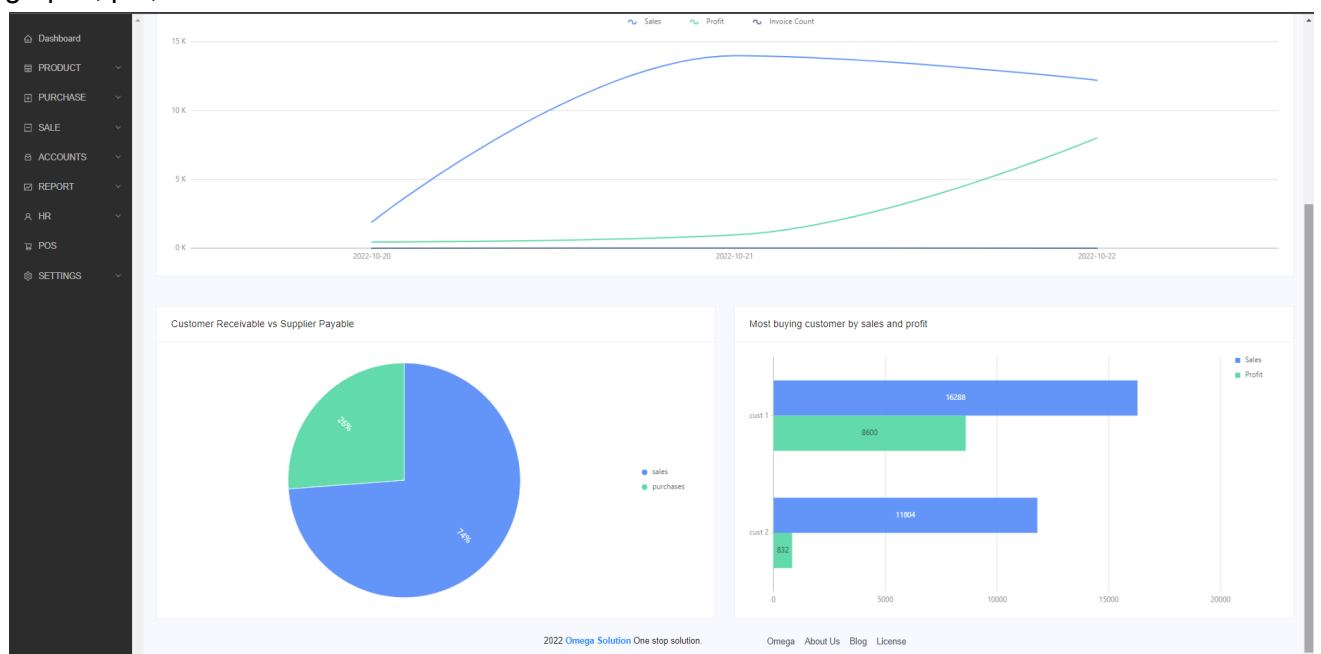
* Username:

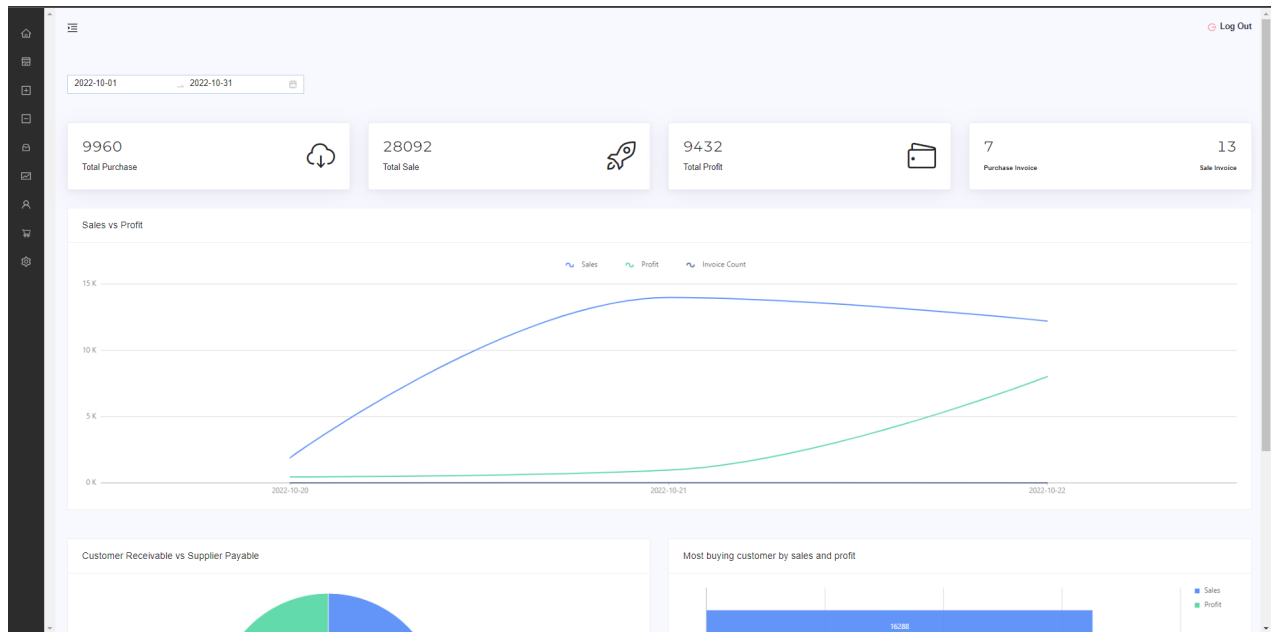
* Password:

username	password
staff	staff
admin	admin

STEP 02 - Dashboard

You will see the dashboard after logging in. You can find your business summary in various graphs, pie, and line charts here.





STEP 03 - Category

You have to add the product category first. You can create this from the side nav options.

The 'Add Product Category' form includes a 'Name' field with the value 'category new' and an 'Add Category' button. The 'Import From CSV' section has a 'Choose File' button and an 'Import From CSV' button. The 'PRODUCT LIST' table shows the following data:

ID	Name	Created At
1	category 1	2022-11-17
2	category 2	2022-11-17

STEP 04 - Product creation

After creating a category now you can create products from the same sidenav.

When creating a product you will enter the necessary product information in that form. After creating the product the product will be available on the product list. You can track your product's quantity and other information there.

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Product Category

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Add Product

Name: product test

Select Category: category 1

Select Unit Type: ltr

Unit Measurement: 5

Quantity: 100

Purchase Price: 25

Sale Price: 35

Reorder Quantity: 2

Upload Image:

+

Upload

SKU No: 6464654

Add Product

Import From CSV

Choose File

No file chosen

Import From CSV

STEP 05 - Create purchase

Now you can create suppliers and then create purchase invoices against that supplier. On purchase, your newly purchased product will be added to the Inventory and necessary account transactions will be created.

You can manage your supplier's accounts and other transactions automatically. Necessary journal entry and Income statements, Balance sheet adjustment will be done automatically.

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Purchase New Products

Supplier: supplier 2

Date: 2022-11-18

Total: 400 tk

Discount: 0

After Discount: 400 tk

Paid Amount: 300

Due Amount: 100 tk

Purchase Product

Supplier Memo: 123

note: asap delievery

SL	Product	Quantity	Unit Price	Total	
1	product 2	10	10	100	
2	product 3	20	15	300	

+ Add Product

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ID : 5 |

Return Product

Print

Initial invoice information

Purchase Date : Nov 9, 2022

Supplier : [supplier 1](#)

Total Amount : 90

Discount : 10

Paid Amount : 40

Due Amount : 40

New Invoice Information

Total Paid Amount : 40

Total Return Amount: 40

Due Amount : 0

Supplier Memo No : A2012

Note : New note added

Purchased Product Information

ID	Name	Product Quantity	Product Unit Price	Total Price
2	product 2	5	10	50
1	product 1	5	8	40

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Return Purchase Information

STEP 06 - Create sale

In the same way, you have created the purchase now you can create customers and then new sales under the customer. You can manage all the accounts, transaction history, and return products of that customer automatically.

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Sale New Products

Customer

Date

Sales Person

Total:

155 tk

customer 1

2022-11-18

admin

Discount:

5

After Discount:

150 tk

Paid Amount:

100

Due Amount:

50 tk

Sale Product

SL	Product	U.M	Quantity	Unit Price	Total	
1	product 1	2.2	8	10	80	
2	product 2	2.2	5	15	75	

+ Add Product

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ID : 6 |

Return Product

Print PDF

Packing Slip Print

POS Print

Initial Invoice Information

Sale Date : Nov 17, 2022

Customer : customer 1

Total Amount : 125

Discount : 0

Paid Amount : 90

Due Amount : 35

Profit : 35

Update Invoice Information

UNPAID

Total Paid Amount : 90

Total Return Amount: 0

Due Amount : 35

Total Unit Measurement : 22

Sold Product Information

ID	Name	Product Quantity	Product Unit Price	Total Price
2	product 2	5	15	75
1	product 1	5	10	50

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STEP 07 - Transactions, Financial Statements, Staff Manage, Invoice Setting

You can also create accounts and make transactions. Manage your staff and assign them various roles and permissions. See your financial statements etc.

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TRANSACTION HISTORY

2022-11-01 2022-11-30

Download CSV

Column Visibility

ID	Date	Debit Account	Credit Account	Amount	Particulars
32	Nov 17, 2022	Inventory	Cost of Sales	90	Cost of sales reduce on Sale return Invoice #1 of sale invoice #2
31	Nov 17, 2022	Sales	Accounts Receivable	125	Account Receivable on Sale return invoice #1 of sale invoice #2
30	Nov 17, 2022	Discount Given	Accounts Receivable	10	Discount given of Sale Invoice #3
29	Nov 17, 2022	Cash	Accounts Receivable	105	Received payment of Sale Invoice #3
28	Nov 17, 2022	Cash	Accounts Receivable	125	Received payment of Sale Invoice #1
27	Nov 17, 2022	Cost of Sales	Inventory	90	Cost of sales on Sale Invoice #6
26	Nov 17, 2022	Accounts Receivable	Sales	35	Due on Sale Invoice #6
25	Nov 17, 2022	Cash	Sales	90	Cash receive on Sale Invoice #6
24	Nov 17, 2022	Cost of Sales	Inventory	90	Cost of sales on Sale Invoice #5
23	Nov 17, 2022	Accounts Receivable	Sales	25	Due on Sale Invoice #5

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Download CSV

Column Visibility

ID	Account	Account Type
1	Cash	Asset
2	Bank	Asset
3	Inventory	Asset
4	Accounts Receivable	Asset
5	Accounts Payable	Liability
6	Capital	Capital
7	Withdrawal	Withdrawal
8	Sales	Revenue
9	Cost of Sales	Expense
10	Salary	Expense
11	Rent	Expense
12	Utilities	Expense
13	Discount Earned	Revenue

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Trial Balance

Balance Sheet

Income Statem...

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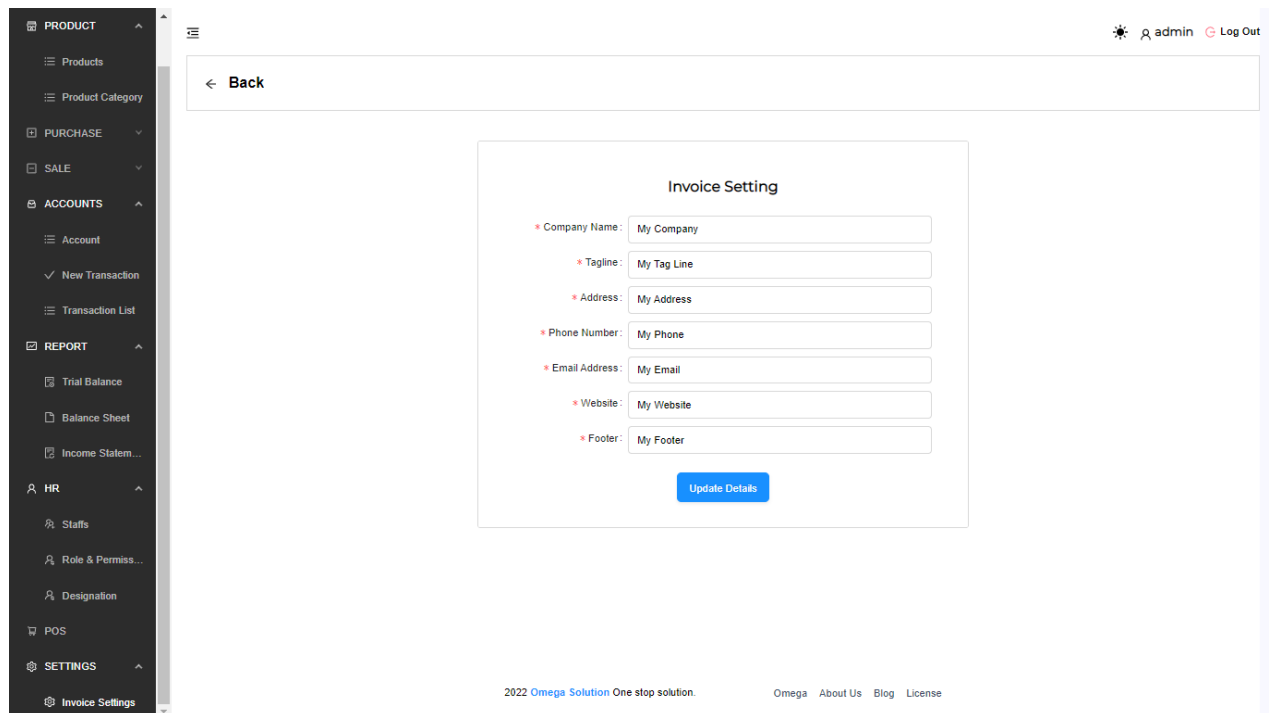
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Balance Sheet

Account	Amount
Assets	
Cash	185
Inventory	3240
Accounts Receivable	60
TOTAL	3485
Liabilities	
Accounts Payable	40
TOTAL	40
Equity	
Capital	3300
Sales	595
Discount Earned	10
Cost of Sales	-450
Discount Given	-10
TOTAL	3445
Total Liability and Equity	3485



Please email us if you need any help with using the application. We will assist you as soon as possible and in most cases within 1 day. Customer satisfaction is the most important thing that we care about.

CONTACT INFORMATION:

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