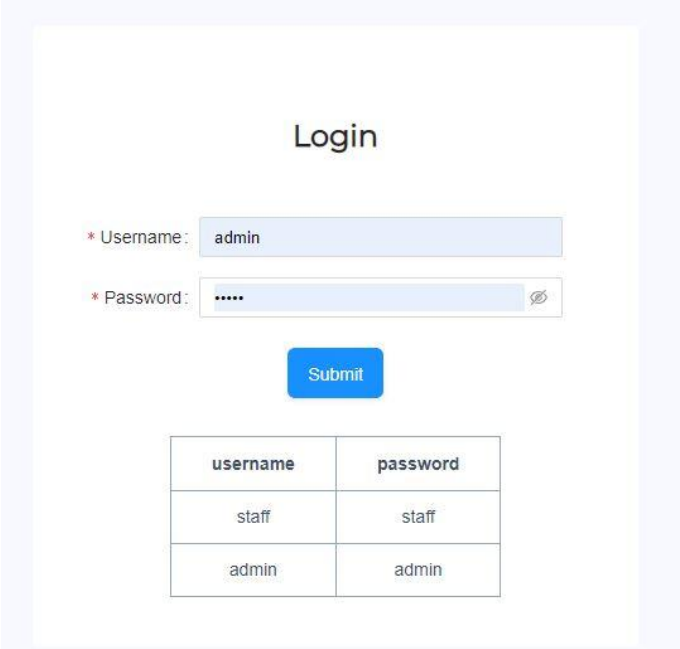
ERP OS - Quick Start Guide

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

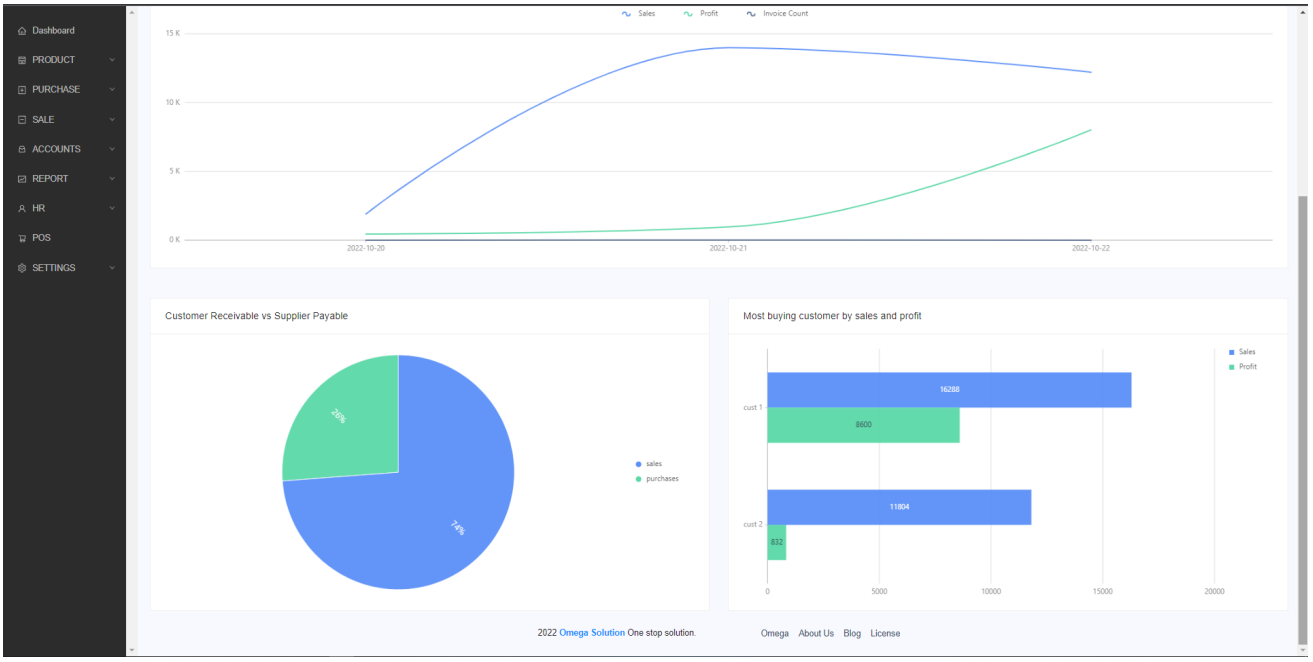
STEP 01 - Login

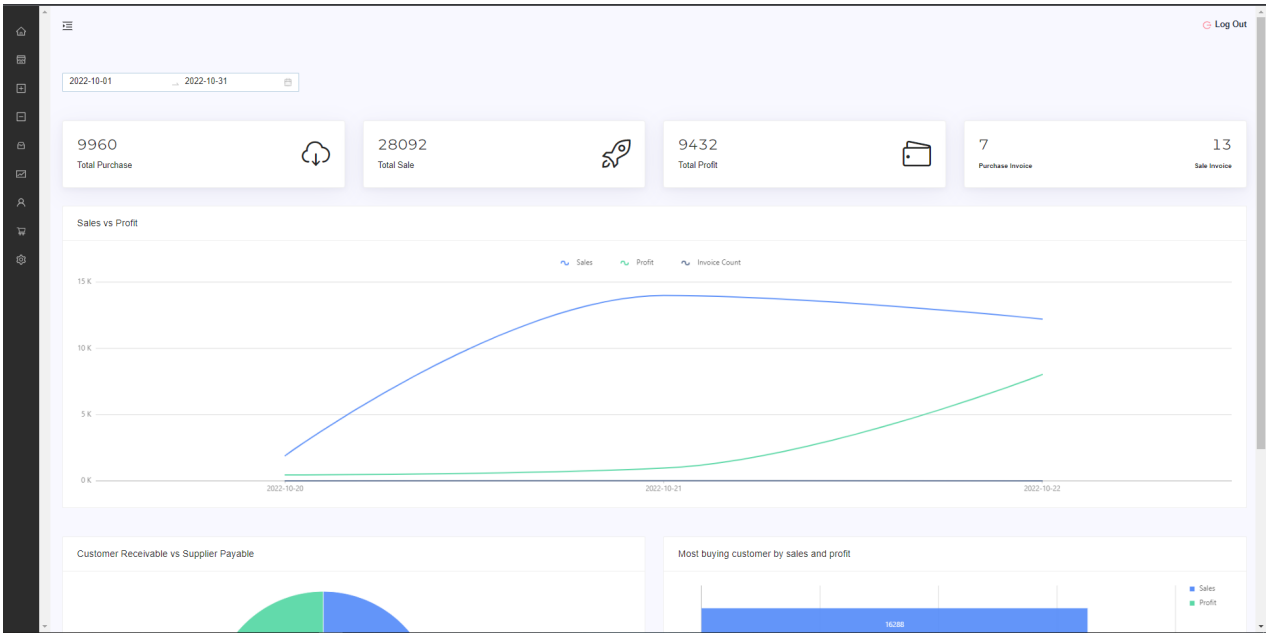
Already an admin and staff account has been created. You can just log in using username: admin, password: admin. After login change your username and password.



STEP 02 - Dashboard

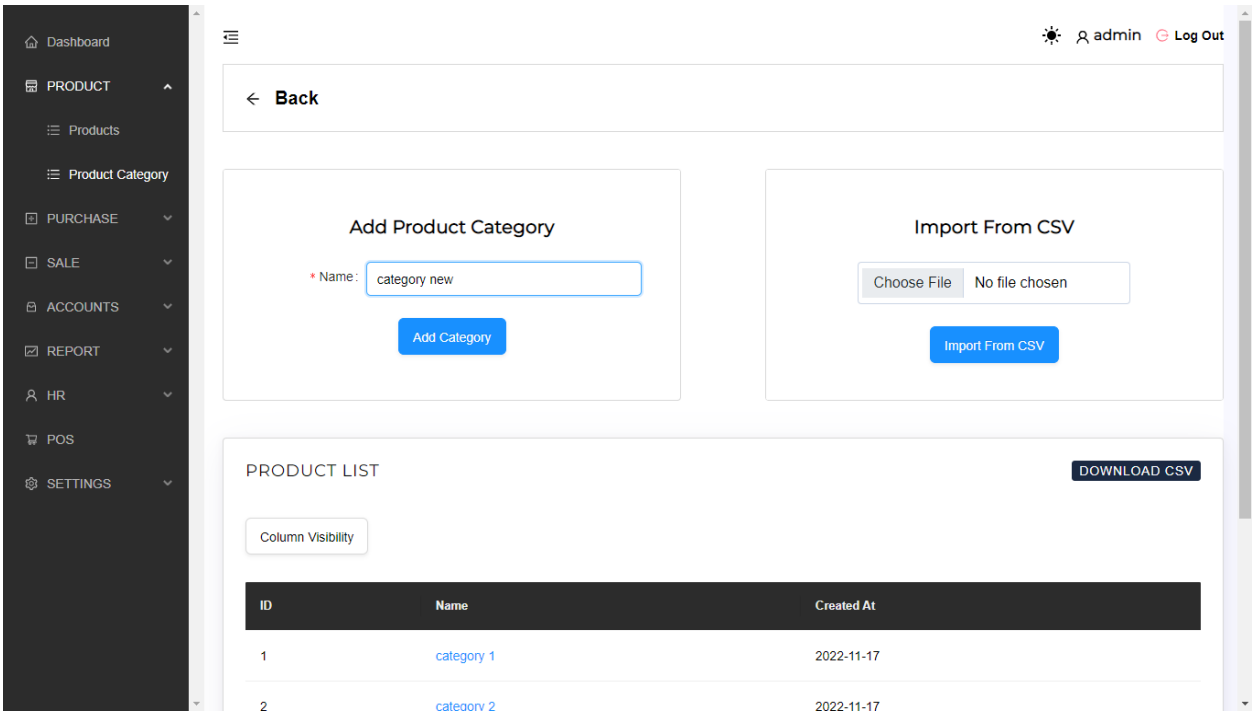
You will see the dashboard after logging in. You can find your business summary in various graphs, pie, and line charts here.





STEP 03 - Category

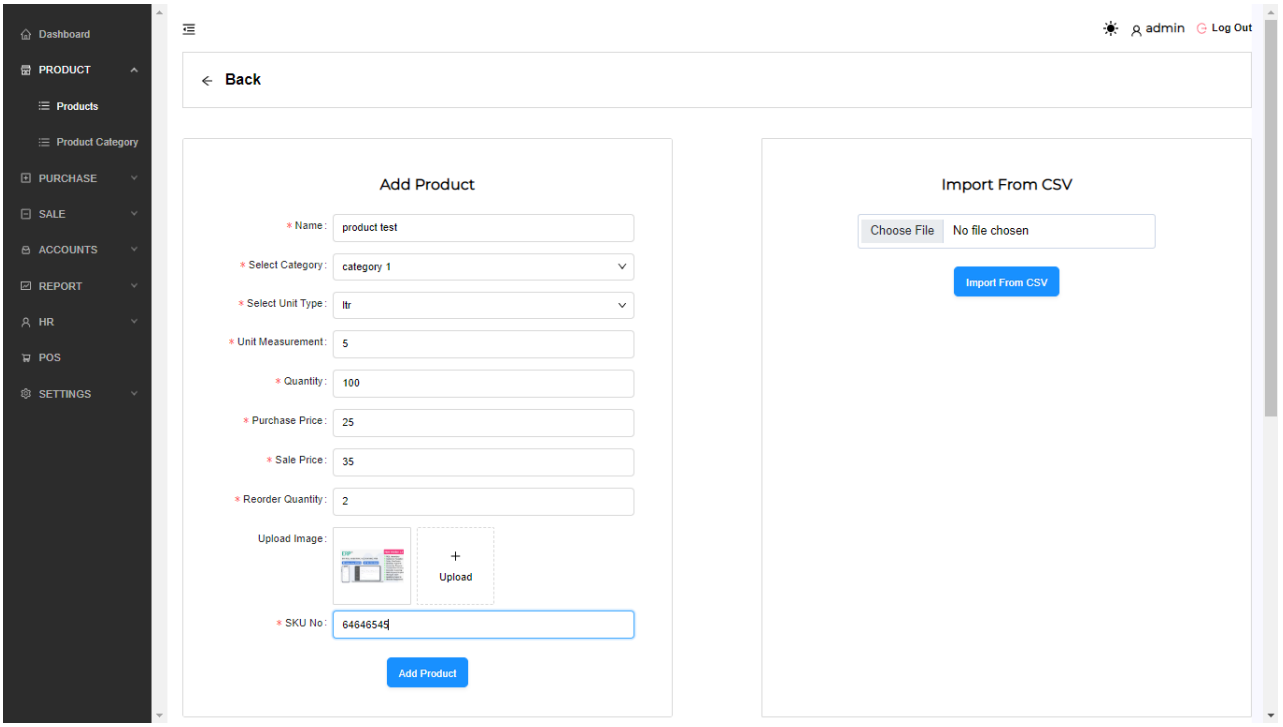
You have to add the product category first. You can create this from the side nav options.



STEP 04 - Product creation

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

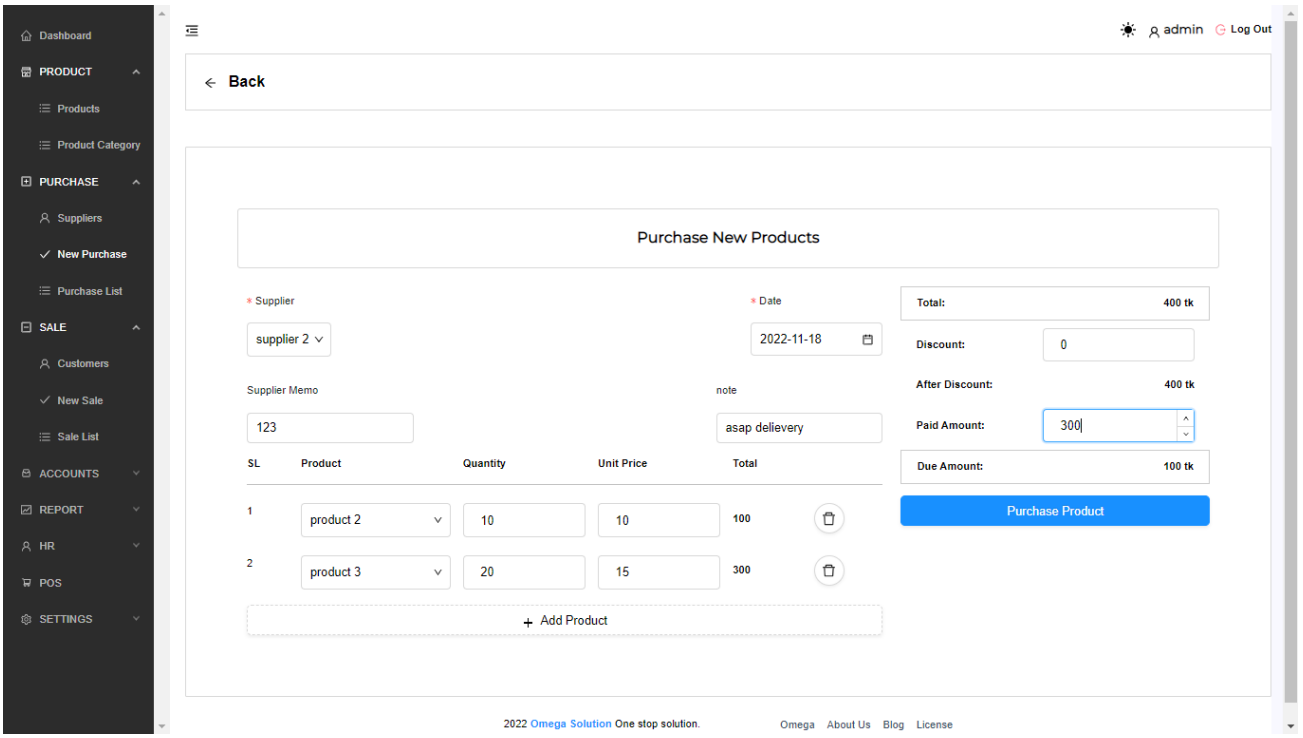
When creating a product you will enter the necessary product information in that form. After creating the product the product will be available on the product list. You can track your product's quantity and other information there.

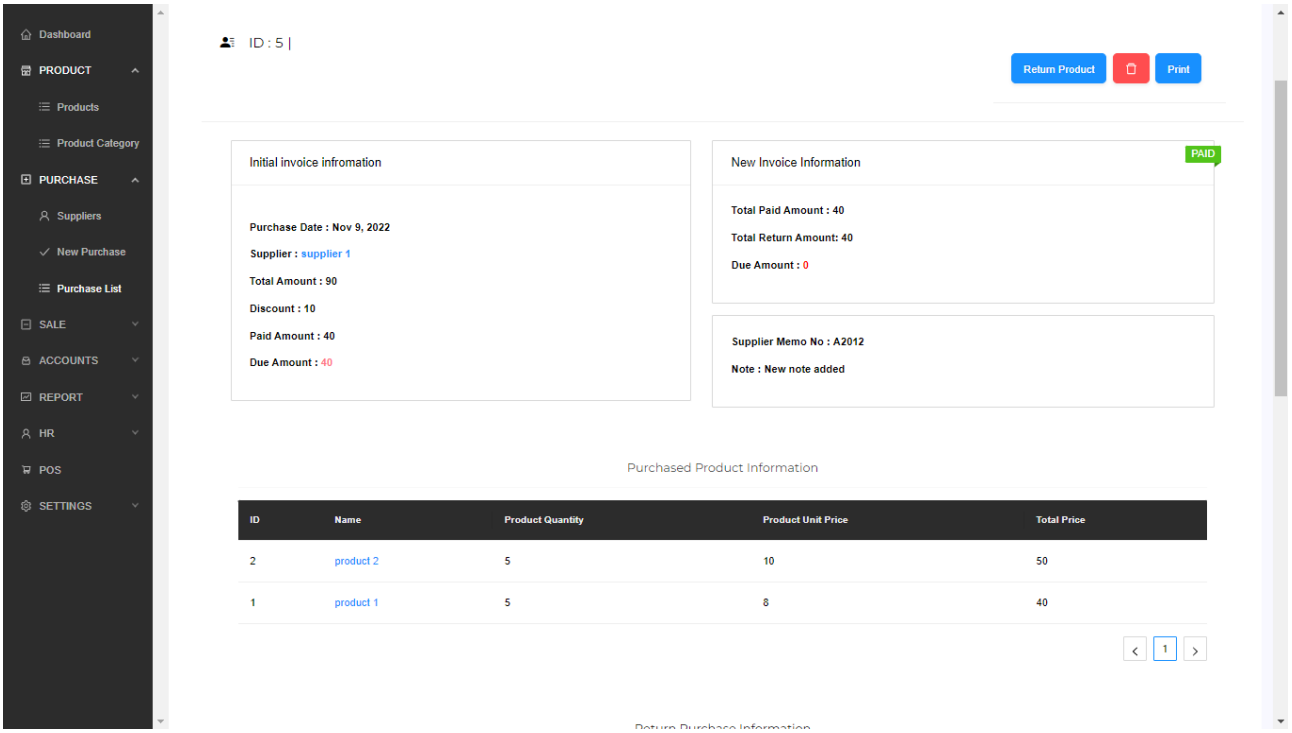


STEP 05 - Create purchase

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.

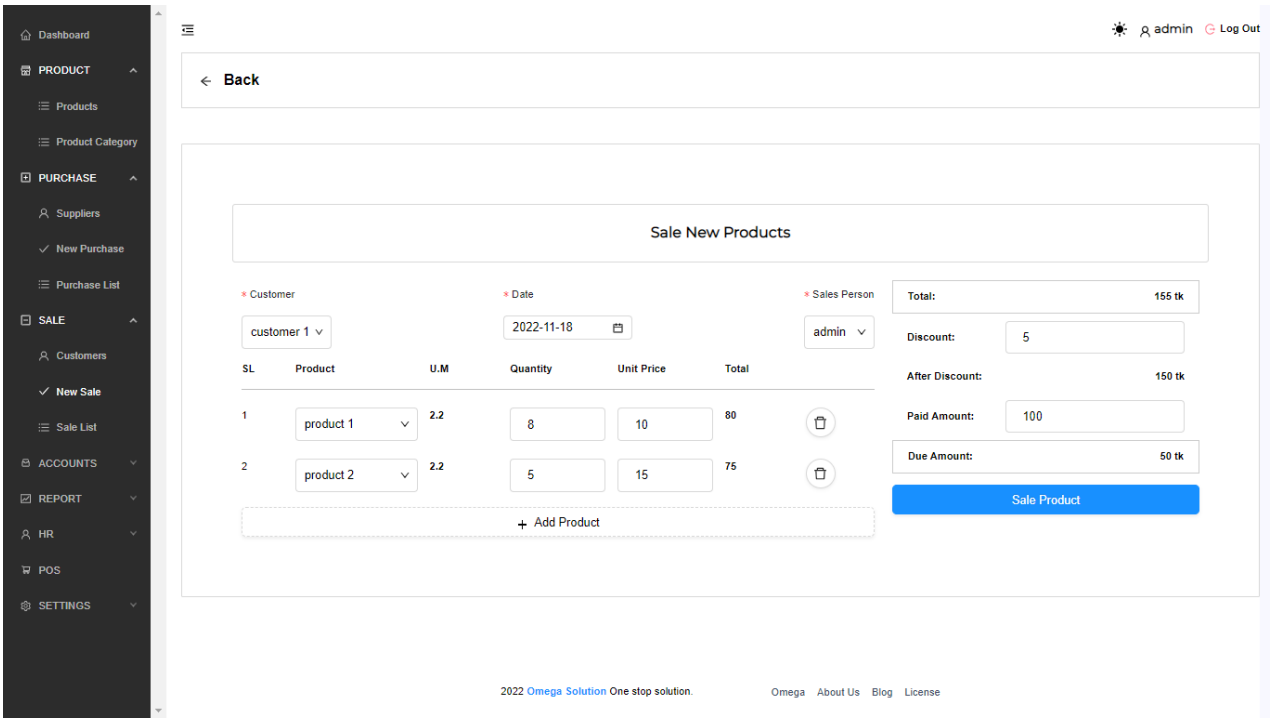
You can manage your supplier's accounts and other transactions automatically. Necessary journal entry and Income statements, Balance sheet adjustment will be done automatically.

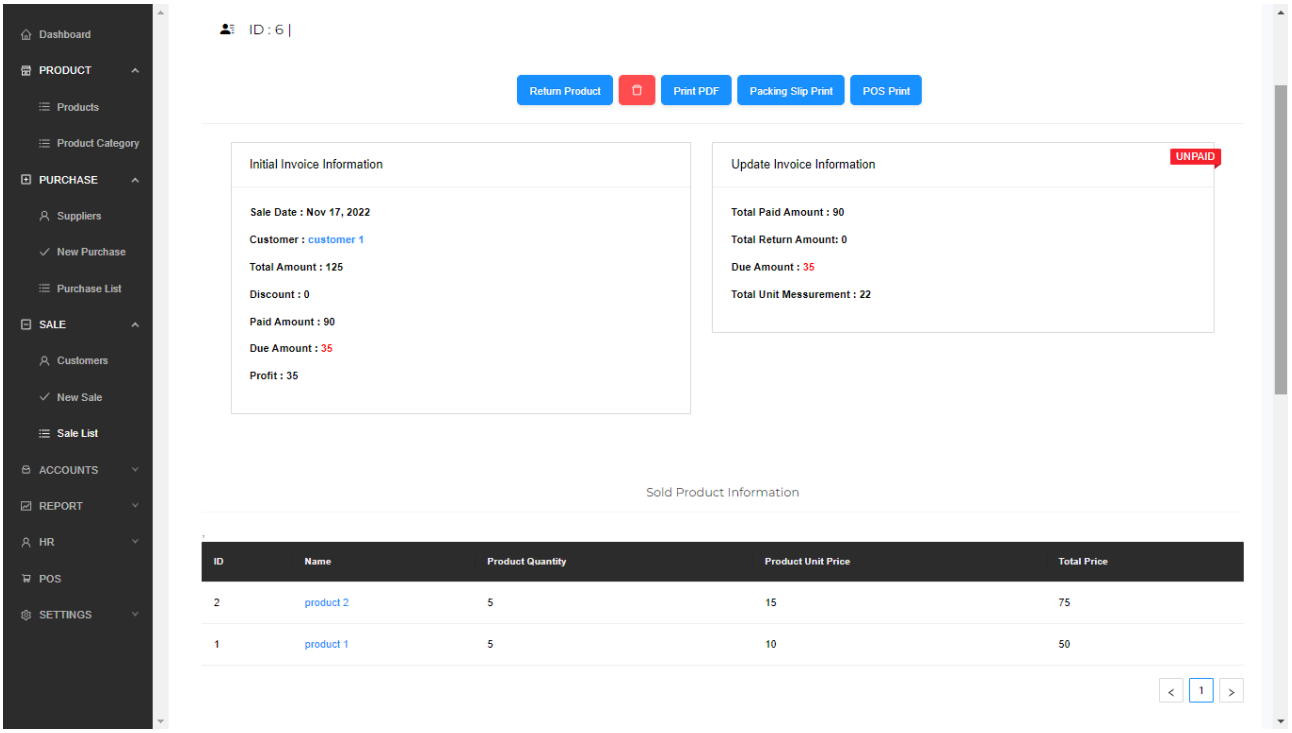




STEP 06 - Create sale

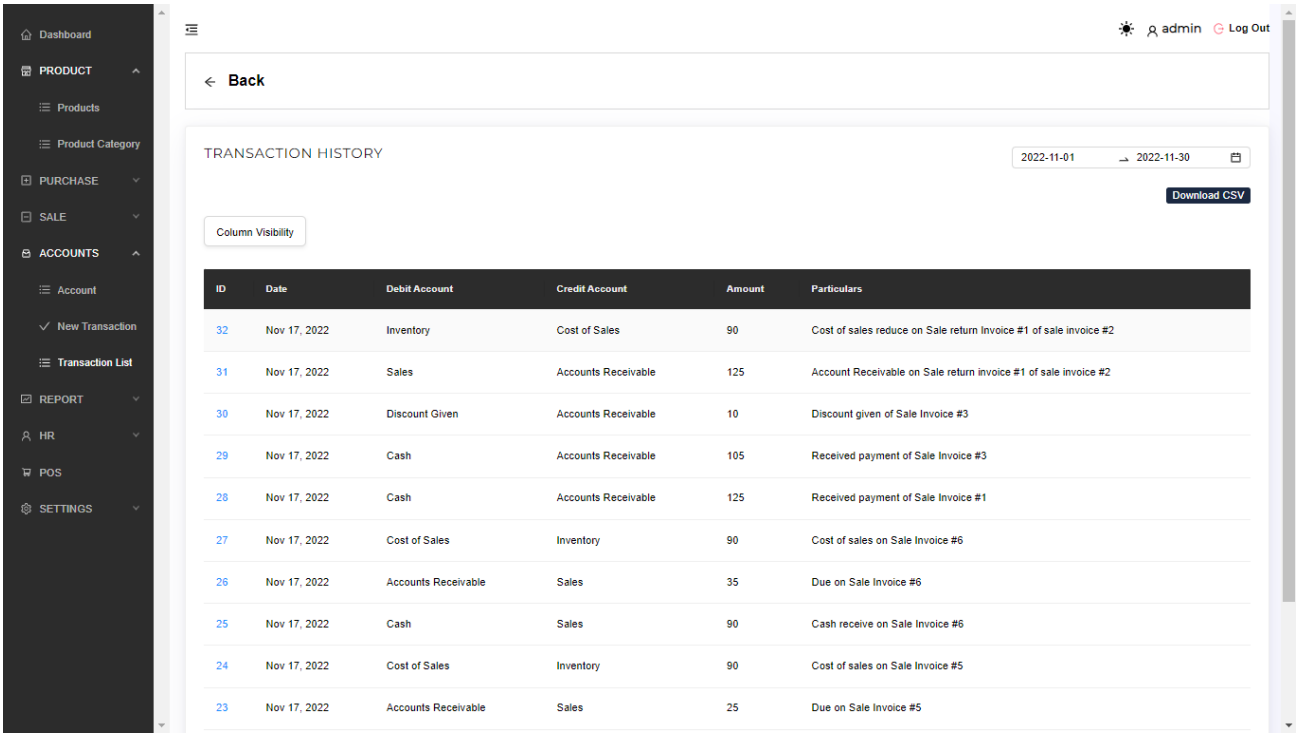
In the same way, you have created the purchase now you can create customers and then new sales under the customer. You can manage all the accounts, transaction history, and return products of that customer automatically.

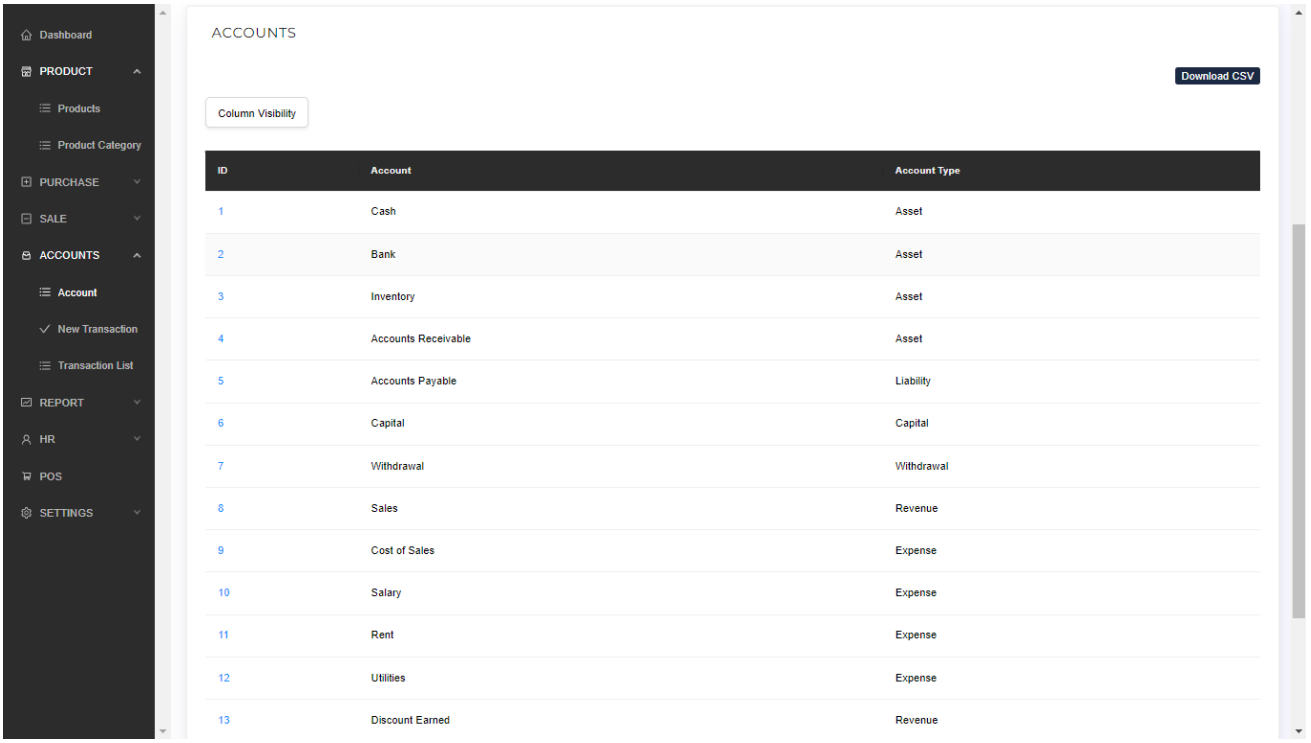




STEP 07 - Transactions, Financial Statements, Staff Manage, Invoice Setting

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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ACCOUNTS
Account
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Transaction List
REPORT
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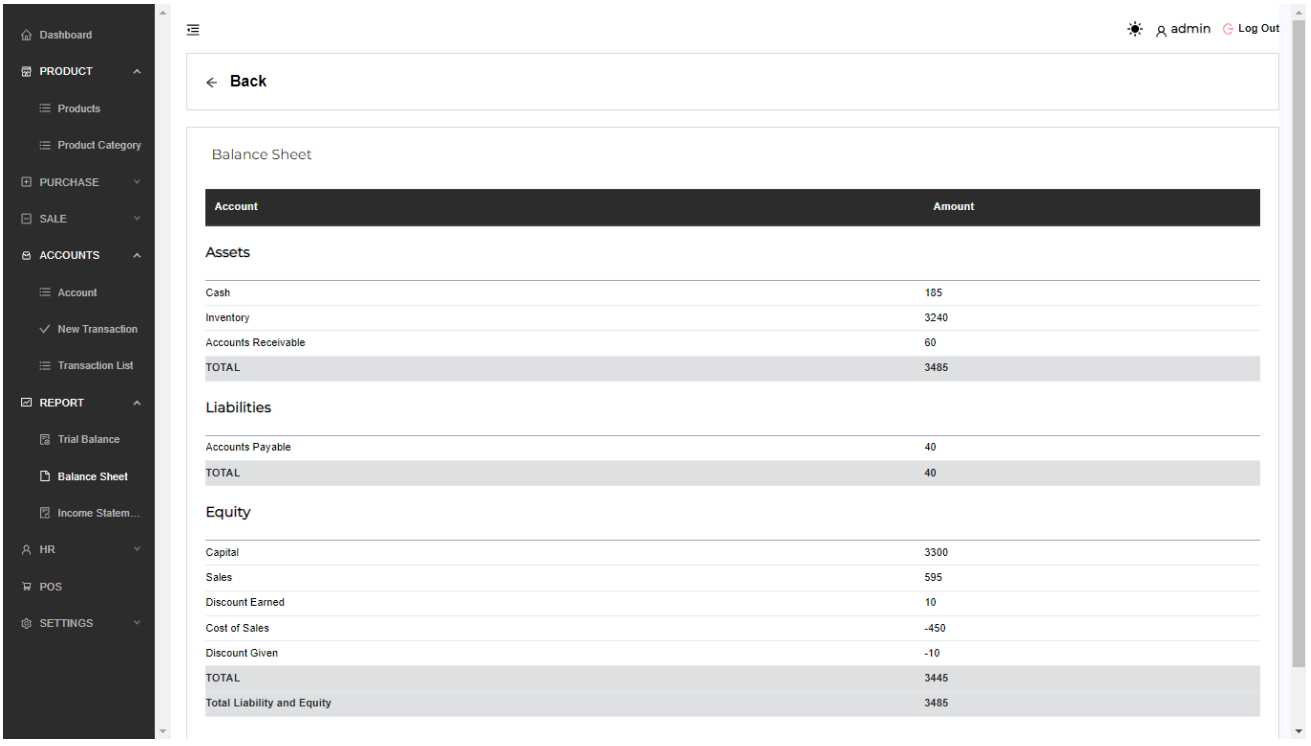
POS
SETTINGS
ACCOUNTS
Download CSV
Column Visibility
ID
Account
Account Type
1 Cash Asset
2 Bank Asset
3 Inventory Asset
4 Accounts Receivable Asset
5 Accounts Payable Liability
6 Capital Capital
7 Withdrawal Withdrawal
8 Sales Revenue
9 Cost of Sales Expense
10 Salary Expense
11 Rent Expense
12 Utilities Expense
13 Discount Earned Revenue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Log Out
Back
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Amount
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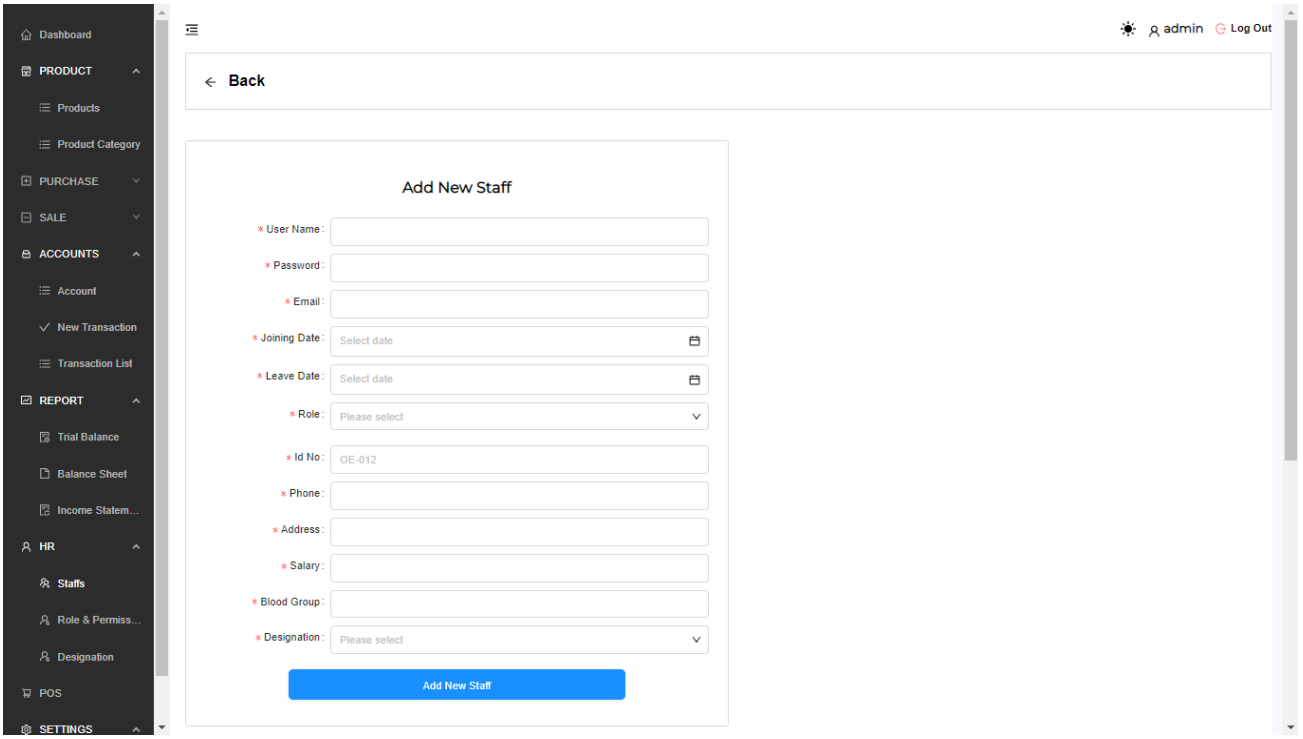
Cash 185
Inventory 3240
Accounts Receivable 60
TOTAL 3485
Liabilities
Accounts Payable 40
TOTAL 40
Equity
Capital 3300
Sales 595
Discount Earned 10
Cost of Sales -450
Discount Given -10
TOTAL 3445
Total Liability and Equity 3485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admin
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Back
Add New Staff
* User Name :
* Password :
* Email :
* Joining Date :
Select date
* Leave Date :
Select date
* Role :
Please select
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OE-012
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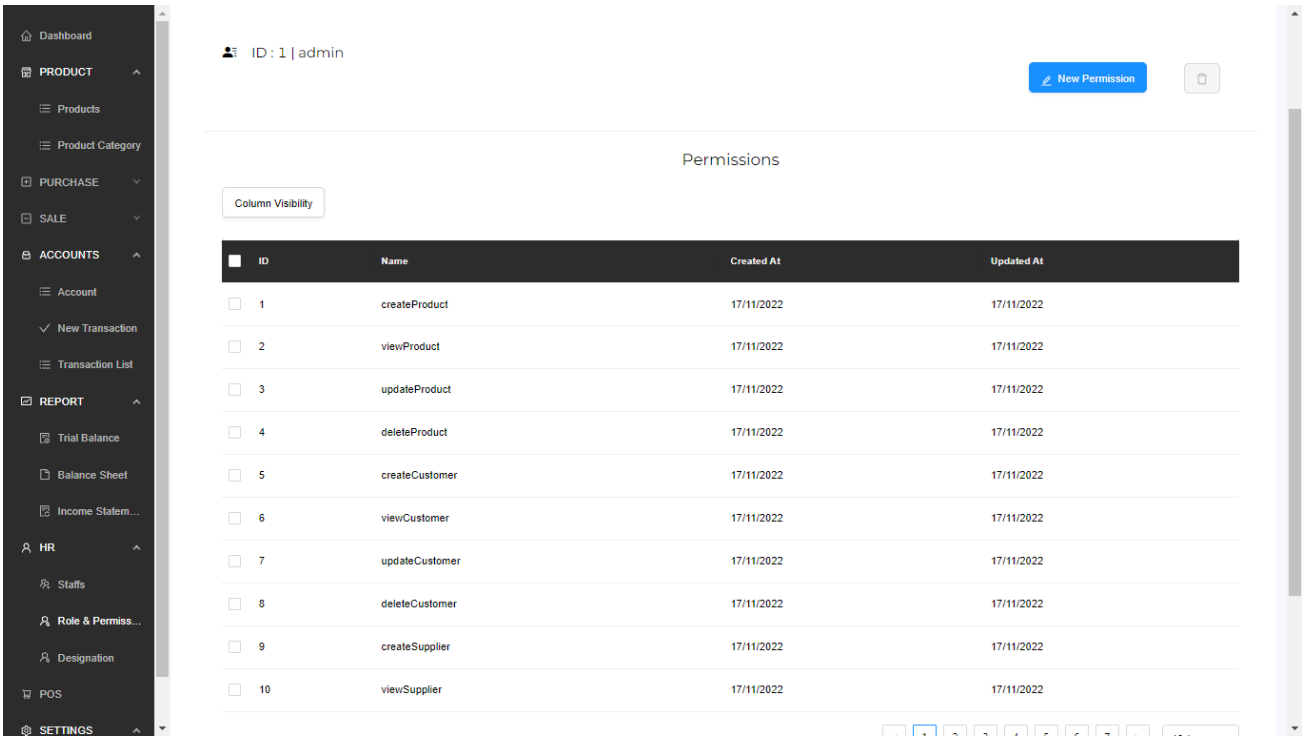
* Address :
* Salary :
* Blood Group :
* Designation :
Please select
Add New Staff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Updated At
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2 viewProduct 17/11/2022 17/11/2022
3 updateProduct 17/11/2022 17/11/2022
4 deleteProduct 17/11/2022 17/11/2022
5 createCustomer 17/11/2022 17/11/2022
6 viewCustomer 17/11/2022 17/11/2022
7 updateCustomer 17/11/2022 17/11/2022
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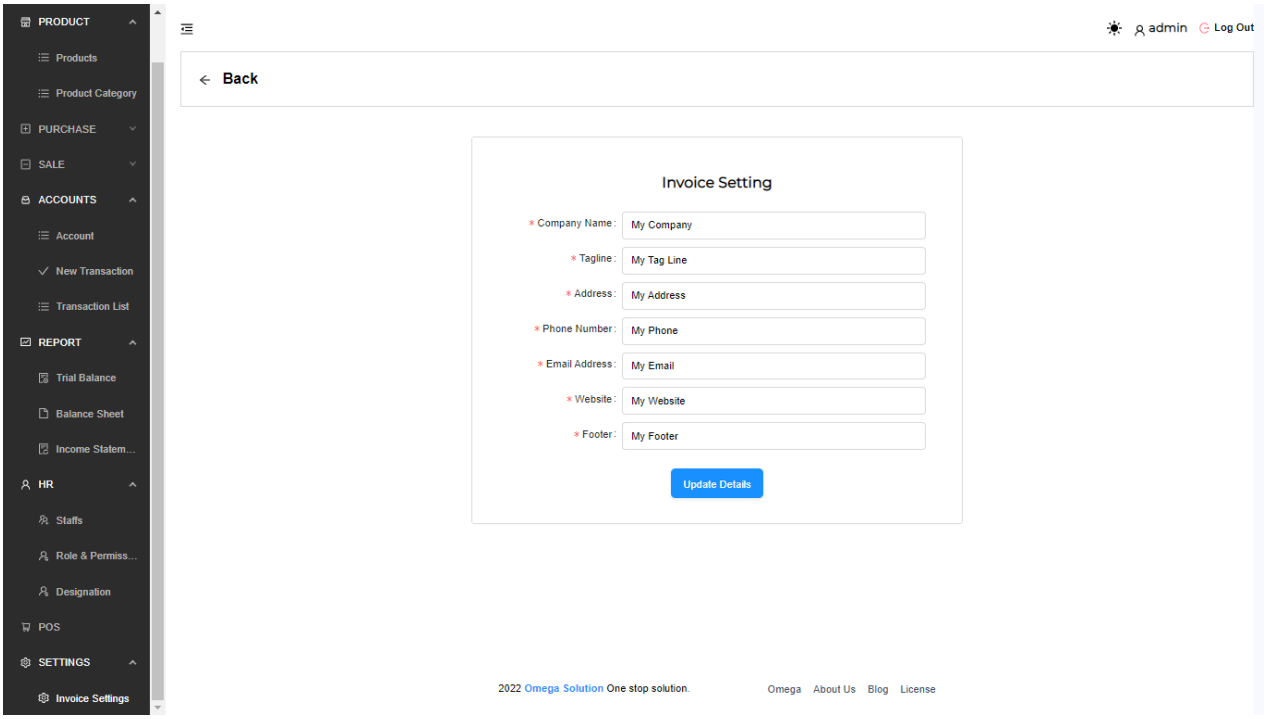

Please email us if you need any help with using the application. We will assist you as soon as possible and in most cases within 1 day. Customer satisfaction is the most important thing that we care about.

CONTACT INFORMATION:
Website: solution.omega.ac
Email: solution@omega.ac