GrowERP
The OpenSource ERP system which grows with your business

GrowERP user guide: for demo and test.

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1. Introduction

This document represents the GrowERP system introduction with current functions and how to do an initial setup for your company.

We have provided 2 ways to create a demo site:

1. ***We do for you*** : You can ask us to provide an online demo system especially for you by sending an email to: support@antwebsystems.com
2. ***Create by yourself*** : You can do the quick install by downloading the script from the GrowERP website after the script is run successfully then you can start access to the GrowERP site in the web browser with this URL → http://localhost:8080/backend

This document will explain the overview; detailed information is always available at the menu help screens which can be accessed clicking on the “?” at the top right corner.

2. The initial setup for your company.

The initial setup screen will display the first time when you have installed the system with no initial data so no demo data.

Steps to setup your company

- Login to the system with user 'admin' and password 'ofbiz'. (already created for you) If this is a production system change the password now by clicking on the username at the top right.
- Enter your company information with the first product, first category , first customer with an address, and also optional setup for VAT percentage.

3. Steps to add a new supplier and link to the product.

For the purchase order creation, you have to create a new supplier party and create a supplier product with related to a new supplier. After that, you can place a purchase order for the next step.

Steps to create new supplier

- Go to the CRM application then select the ‘Create New’ button on the screen.
- The create new party detail will show up, select the ‘Create Supplier’.
- Enter your supplier information with an address, telephone numbers, and also an email address.

Steps to link to the a product

- Go to the “Catalog” from the “Application” menu and search for the product what you want to create as supplier product.
- The product screen will show up then select the ‘Suppliers’ menu for link a supplier to the product, also be able to set the start date and end date of the supplier product with price and currency.

4. Value Added Tax(VAT) Calculation.

For the Value-Added Tax(VAT) calculation function, the system will calculate automatically the amount from the product that was set into a VAT group with a specific percentage rate. We have provided two ways to set up VAT groups:

4.1. Initial Value-Added Tax(VAT) setting.

When you do an initial setup for your company, enter the percentage on the First VAT/Sales tax group section. The the system will then create the first VAT Group with the entered percentage and the first product will be assigned to this group.

4.2. Steps for setting up Value-Added Tax(VAT) manually from the accounting setting.

- Go to ‘Accounting’ from Application menu and then ‘Accounting Settings’ menu application. And then select ‘VAT’ on menu bar.
- Click on ‘New VAT Group’ button and enter VAT group name.
- Click on ‘Percentage’ tab bar, to define first percentage rate for this VAT group.
- Click on ‘Product’ tab bar, for add product to VAT group.

***** the system is able to support more than one VAT group however a single product should only be active in single group for any specific date.**

**** It automatically see VAT group link on page also.

5. Steps for creating a Purchase order, completion, posting and checking the warehouse.

This section represent the purchase order process until checking the warehouse.

Steps to create a new purchase order

- Go to the ‘Purchases’ from Application then click the ‘Create New’ button.
- The ‘Order Entry’ screen will show up, enter the supplier from whom you want to buy the product and select the currency, then submit.
- Add the supplier product which you would like to buy from this supplier with quantity.
- After adding all items to the order, click the ‘Finalize Order’ button.

- Your shipping address list will be displayed, select one and continue to final order review.
- Your purchase order information will be displayed. Please review it to make sure that all information is right, then click the “Create Order” button. Otherwise, select the “Order Items” at the top screen to go back to the order items screen for manage your items.

Steps to complete the purchase order

- After the purchase order is created, you can print out the order detail and send to your supplier or send per email. If the supplier contact comes back to you to inform that they have accepted your purchase order, then you can approve the purchase order by clicking on the ‘Approve Order’ button at the top of screen.
- Select the warehouse which you would like to receive the product and click the “Quick Receive Purchase Order” button on the Actions section.
- The receive inventory screen will show up, select the shipment to receive and click the “Receive Selected Shipment” button.
- The receive purchase order screen will show up. This screen will list all products on the selected shipment from the previous step. Select the product(s) and click the “Receive Selected Product(s)” button.
- The system will display the message when the action is completed. If it is completed, click “PO” link it will showed “Purchase order” detail. The purchase order will change status to “Completed” and will create an invoice and payment for the purchase order.

Steps to check warehouse.

- Go to the 'Warehouse' from the Application.
- Select the "Inventory" tab menu item, then enter the product which you would like to check.
- The total summary will show in the search result and also you are able to export as a PDF file. The result of the purchase order should have increased the inventory quantity.

Steps to post the transactions that are related to the purchase invoice.

- The purchase order will display the related invoice link when the purchase order is completed. Select the invoice link on the payment information section to see the invoice detail.
- Click the Status to 'Ready' button.
- The transaction records with the default gl account will show up on the "Transactions" section and all transaction records will be posted is all glDefault assignments have been set.

6. Steps to create a Sales order, completion,and checking warehouse.

This section represent the sales order process until checking the warehouse.

Steps to create new sales order

- Go to the 'Sales' from Application then click the 'Create New' button.
- The create new order screen will show up, select the 'Sales Order' on the Order Type selection, enter the first customer who you entered on

the initial setup. (If you would like to create new customer, you can do in the CRM application)

- After adding all the items to the order, click the 'Quick Finalize Order' button.
- Select the shipment and payment options, then click on 'Continue to Final Order Review' button
- The sales order confirmation information will be displayed and if the product was defined in VAT group. The VAT/Sales tax calculation will show. Now you can review it to make sure that all information is right. Next click the "Create Order" button. Otherwise select the "Order Items" at the top screen to go back to the order items screen to correct.

Steps to complete sales order

- After the sales order is created, you need to approve the sales order. The current status will show up.
- Select the "Quick Ship Entire Order" on the Actions section.
- If quantity on hand of the product is available for the order, the sales order will change status to completed and will create an invoice and payment, it will also reduce the quantity in the warehouse.

Steps to check the warehouse

- Go to the 'Warehouse' application.
- Select the "Inventory" tab menu, then enter the product Id which you would like to check.
- The total summary will show in the search result which can be exported as a PDF file. For the sales order, the inventory will decrease quantities when the sales order is completed.

7. Posting Sales invoice

Posting the sales order is automatic when the order is completed, however it can be, that it will be in suspense because not all GL defaults records have been properly setup.

8. View balance sheet report

After the order is completed and posted, the balance amount will change on the balance sheet.

- Go to the 'Accounting' application.
- Select the "Reports" on the tab menu then select the "Balance sheet" menu from the sub tab menu.
- The balance sheet screen will be displayed. From this screen, you can select a through date to show balances in the past.

9. Parties and products import.

The system supports the import products as CSV file. There is also support to import parties from CSV file and vCard.

10. Initial Chart of accounts value.

The chart of accounts for the accounting company is built up at setup time and when you add a new account in the Global Chart of Accounts it will be linked automatically to your accounting company.

11. Entering an order in the e-Commerce site.

On the GrowERP, we have provided the frontend and the backend functions. If you are installed the GrowERP on your local. You can go to the GrowERP frontend site from this URL : http://localhost:8080/frontend

Steps to enter an order in the e-Commerce site

- Select the "Shop" menu then you will see the main screen of e-Commerce site.
- The left navigation bar will display all categories which you have set up from the backend. When you select the category, all product in the selected category will be displayed at the right hand side.
- Add the product to the shopping cart.
- Click the shopping cart icon at the top of screen to see the shopping cart detail and make sure the product and quantity that you added is right before create it as an order. You can manage your shopping cart from this screen including add more quantity, remove some product, and recalculate cart, etc.
- Click the "Checkout" button at the top of page for create an order.
- Enter your username and password (In case of initial setup you can use user 'admin' and password 'ofbiz') If you want to create a new user, please select the "Create" link in the login section.
- Enter the shipping and billing information then click the "Submit Order" button. Your order is created and show up on the screen.

12. Manufacturing

The GrowERP provides the manufacturing application, but is disabled by default and must be manually enabled by a configuration option.

In a later version of the document we will explain how to create a production run with MRP.