User Manual (English)

The following are the various modules and domains offered by ERP+ from Technocom, covering a wide range of businesses. You can be a small distributor, a manufacturer, running an educational institute, or a healthcare organization. There is something for everyone.

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Module: Integrations

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1. Amazon Integration
2. PayPal Integration
3. RazorPay Integration
4. Dropbox Backup
5. LDAP Integration
6. Braintree Integration
7. GoCardless Integration
8. Stripe Integration
9. Shopify Integration
10. WooCommerce Integration

1.1 Topic: Amazon Integration

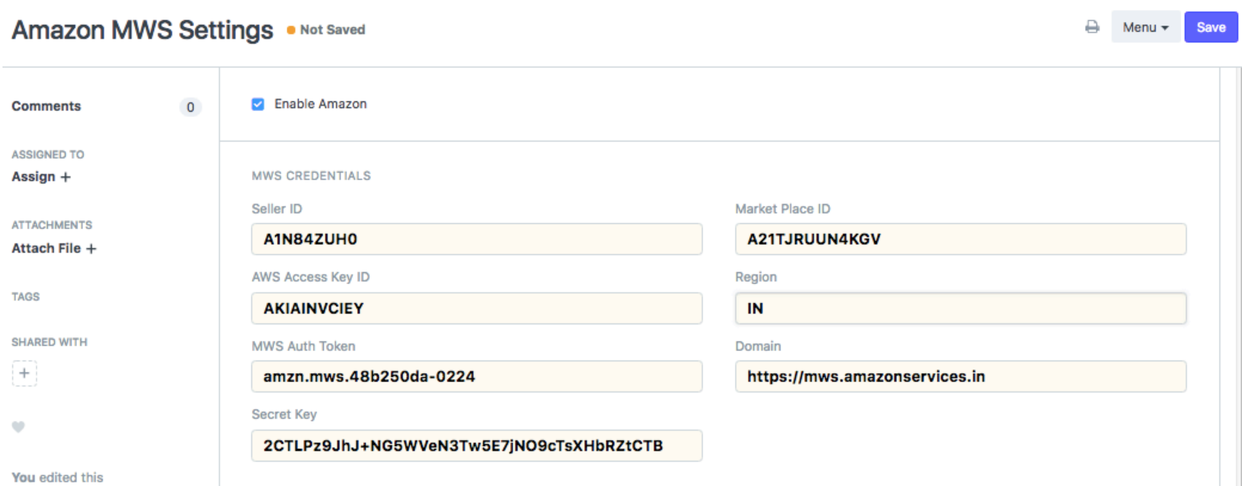
1. Amazon MWS Integration

The Amazon Connector pulls Products and Sales Orders from Amazon marketplace. The sync of Products and Sales Orders is sequential. You have to sync the products before you Sync the Sales Orders.

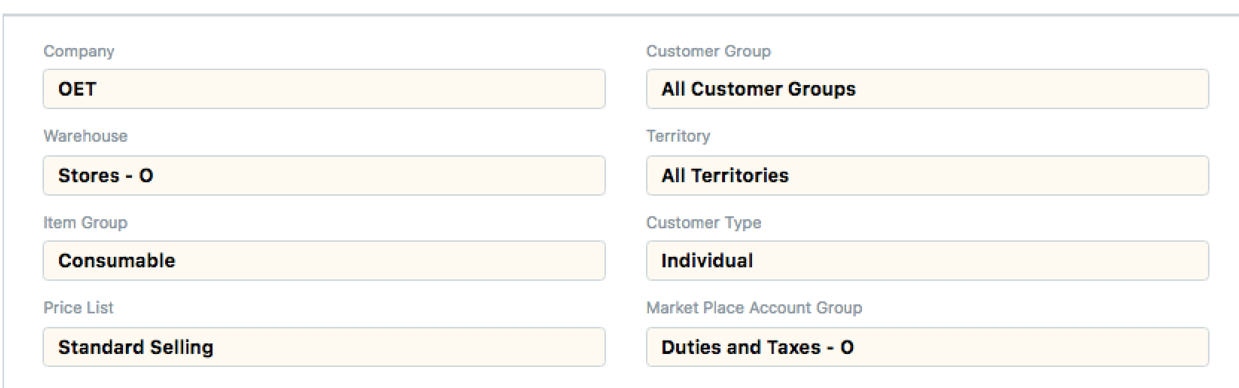
Setting Up Credentials in ERP+

You can request the developer credentials from Amazon MWS once you are a registered seller on their website.

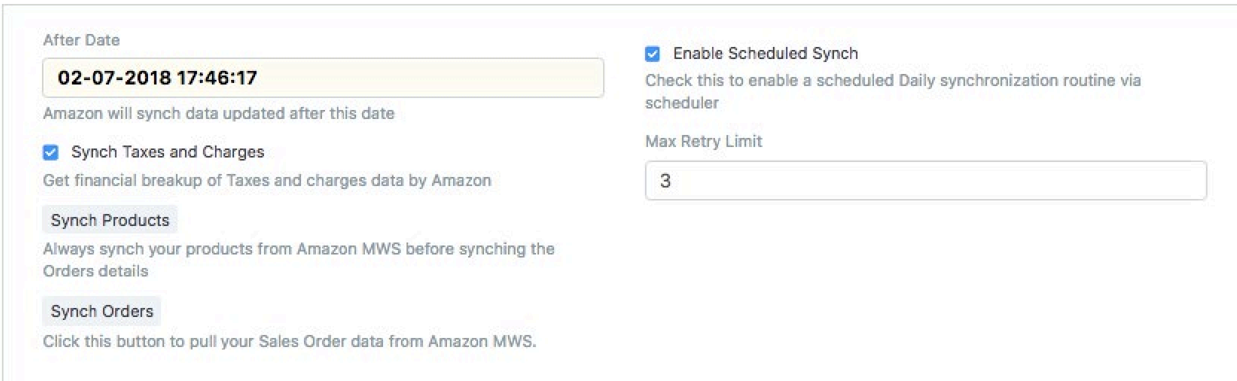
1. Enter the Seller ID, AWS Access Key ID, MWS Auth Token, Secret Key, Market Place ID, Region and Domain.



2. Setup Company, Warehouse, Item Group, Price List, Customer Group, Territory, Customer Type and Account Group. The Account Group is used to hold Commission, taxes etc. that Amazon charges.

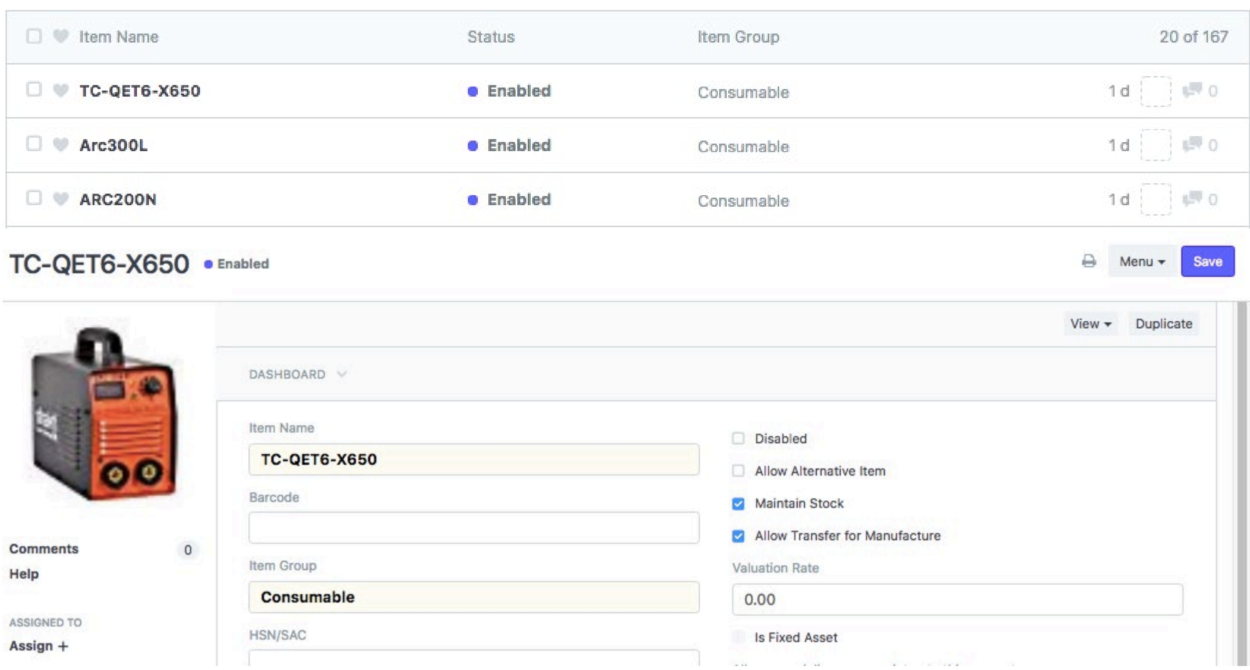


3. Setup Sync Configurations. Using the After Date, you can sync products and orders created after a particular date. In case you are importing a lot of historic data, it is suggested to start in the reverse chronological order of the After Date and import data in small chunks.

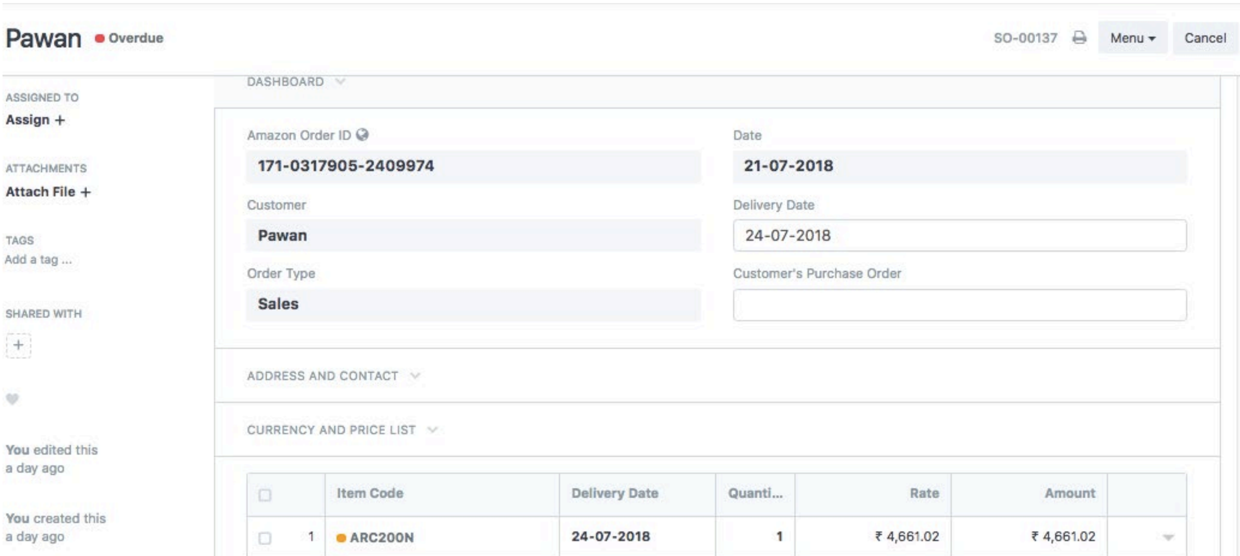


4. After setting up all the configurations, click on Enable Amazon and save the settings. You are now ready to use the integration.

5. Sync Products Click on this button to sync products. Once this is successful you should see your Amazon products as Items in ERP+.



6. Sync Orders Click on this button to sync sales orders. Once this is successful you should see your Amazon Orders as Sales Orders in ERP+. You can also set up scheduler to sync orders automatically.



Note

The connector won't handle Order cancellation. If you cancelled any order in Amazon then manually you have to cancel respective Sales Order and other documents in ERP+.

1.2 Topic: PayPal Integration

Setting up PayPal

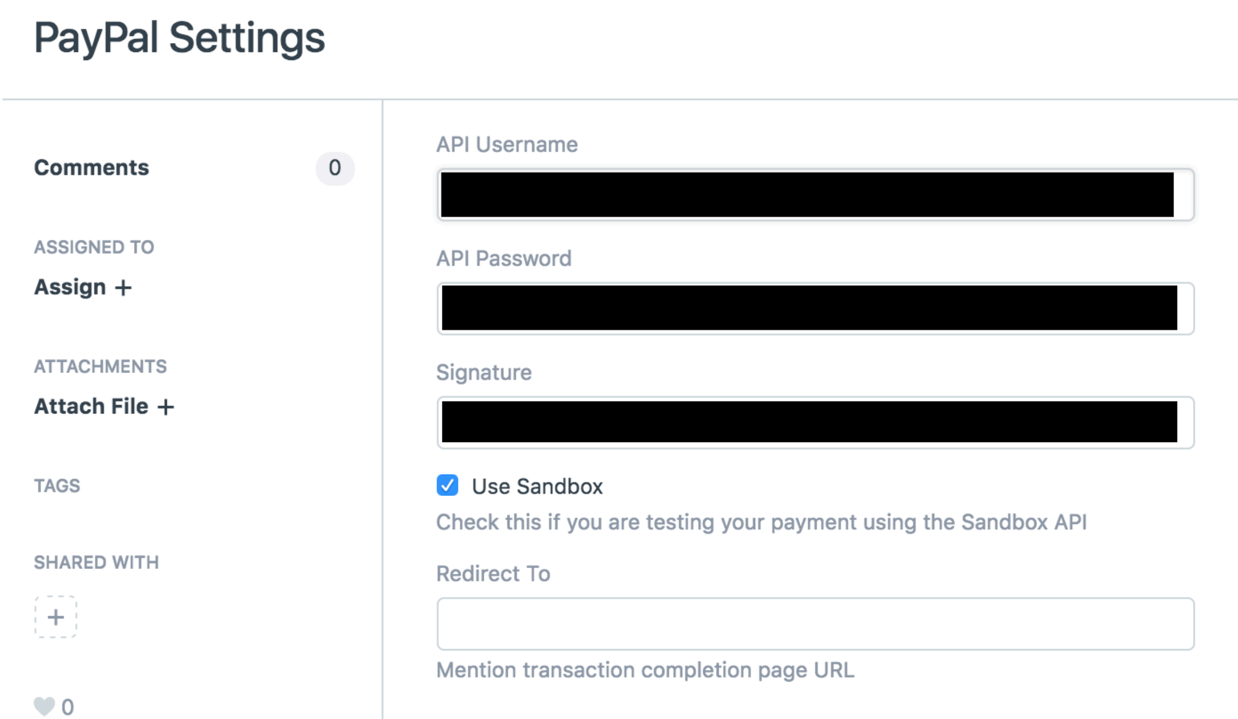
A payment gateway is an e-commerce application service provider service that authorizes credit card payments for e-businesses, online retailers, bricks and clicks, or traditional brick and mortar.

A payment gateway facilitates the transfer of information between a payment portal (such as a website, mobile phone or interactive voice response service) and the Front-End Processor or acquiring bank.

To setup PayPal, Explore > Integrations > PayPal Settings

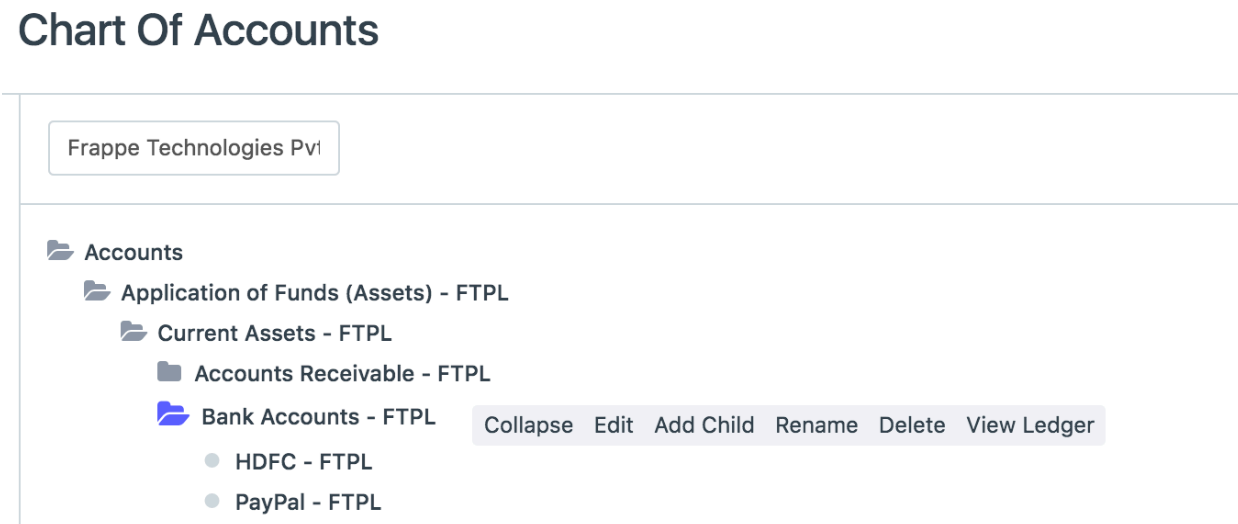
Setup PayPal

To enable PayPal payment service, you need to configure parameters like API Username, API Password and Signature.

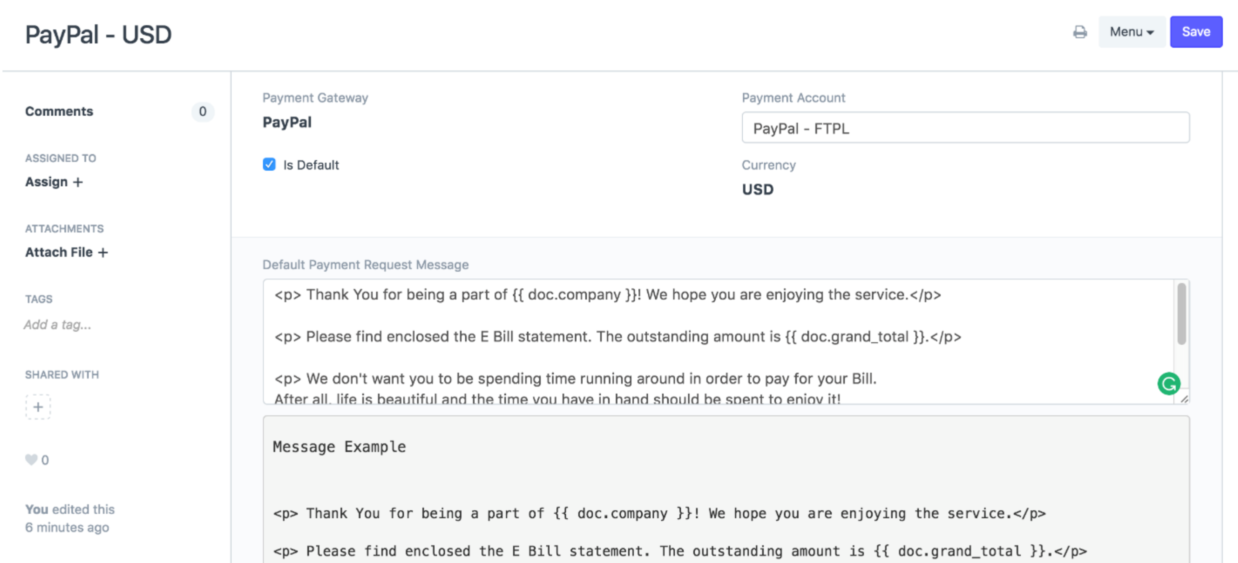


You also can set test payment environment, by settings Use Sandbox

On enabling service, the system will create Payment Gateway record and Account head in chart of accounts having account type as Bank.



Also, it will create Payment Gateway Account entry. Payment Gateway Account is configuration hub from this you can set account head from existing COA, default Payment Request email body template.



After enabling service and configuring Payment Gateway Account your system is able to accept online payments.

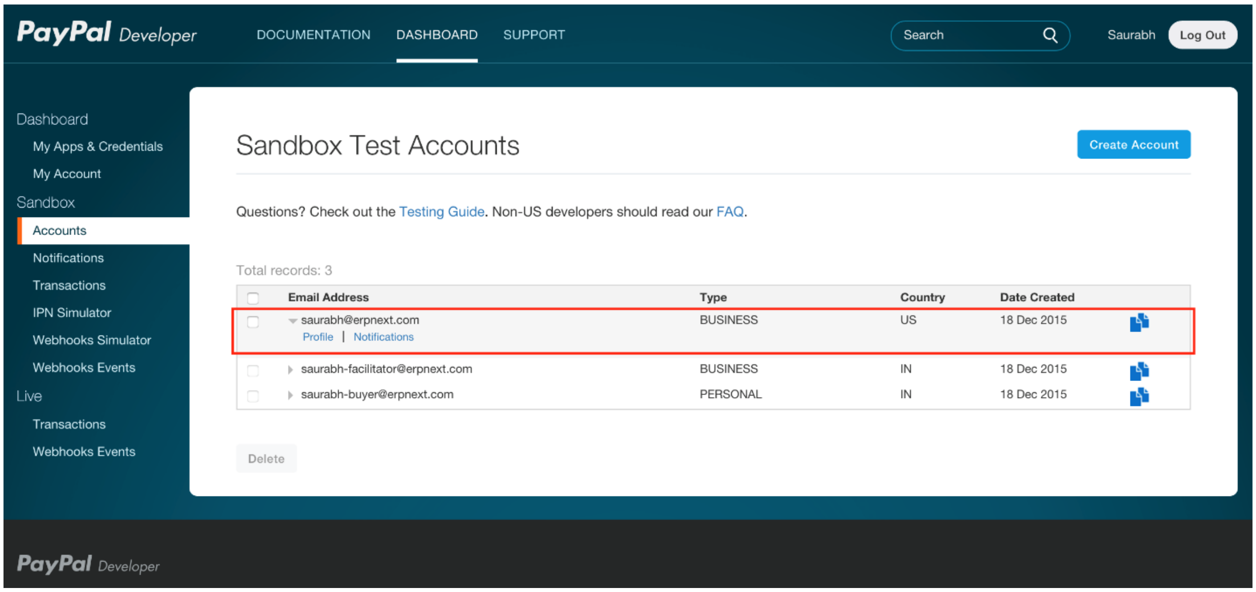
Supporting transaction currencies

AUD, BRL, CAD, CZK, DKK, EUR, HKD, HUF, ILS, JPY, MYR, MXN, TWD, NZD, NOK, PHP, PLN, GBP, RUB, SGD, SEK, CHF, THB, TRY, USD

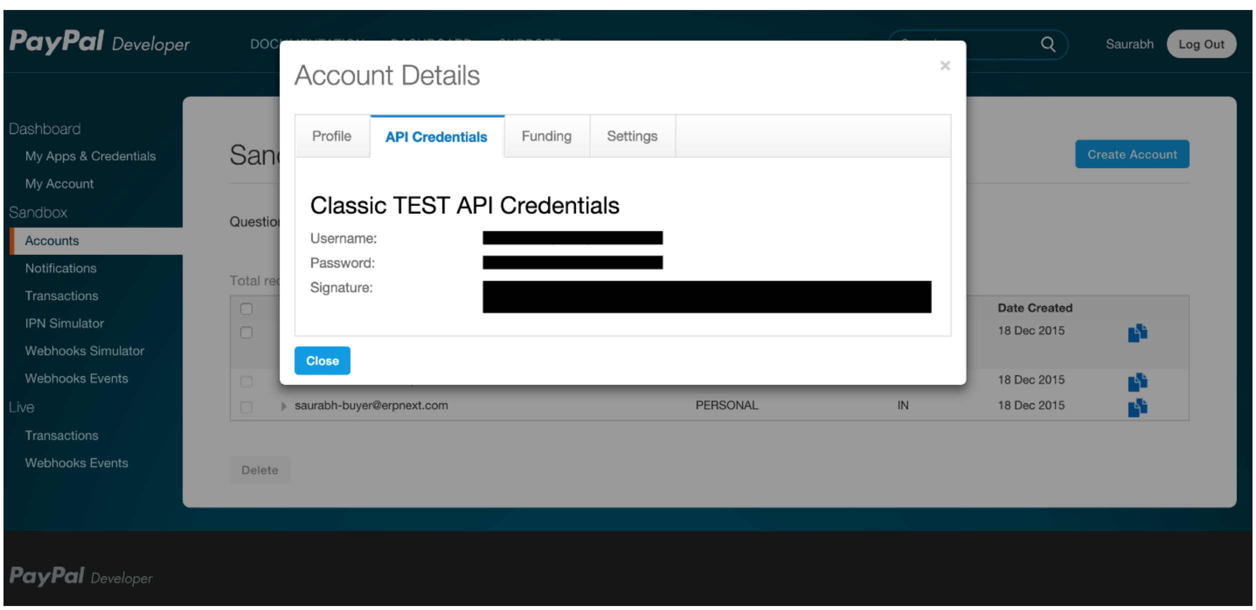
Get PayPal credentials

Paypal Sanbox API Signature

- Login to PayPal developer account, PayPal Developer Account
- From **Accounts** tab. create a new business account.

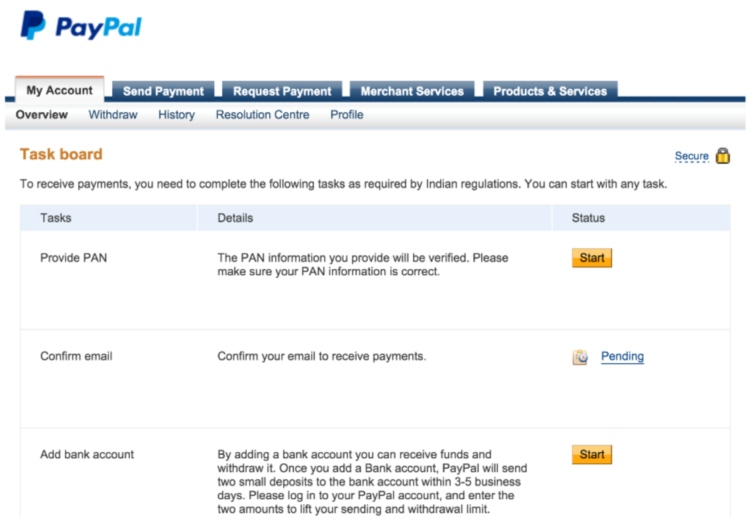


- From this account profile you will get your sandbox api credentials

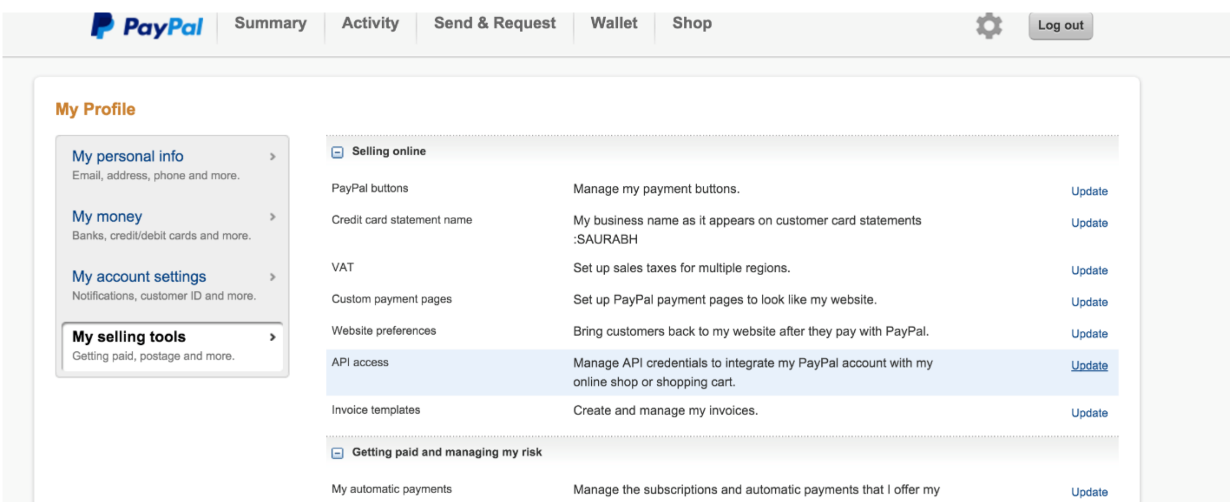


PayPal Account API Signature

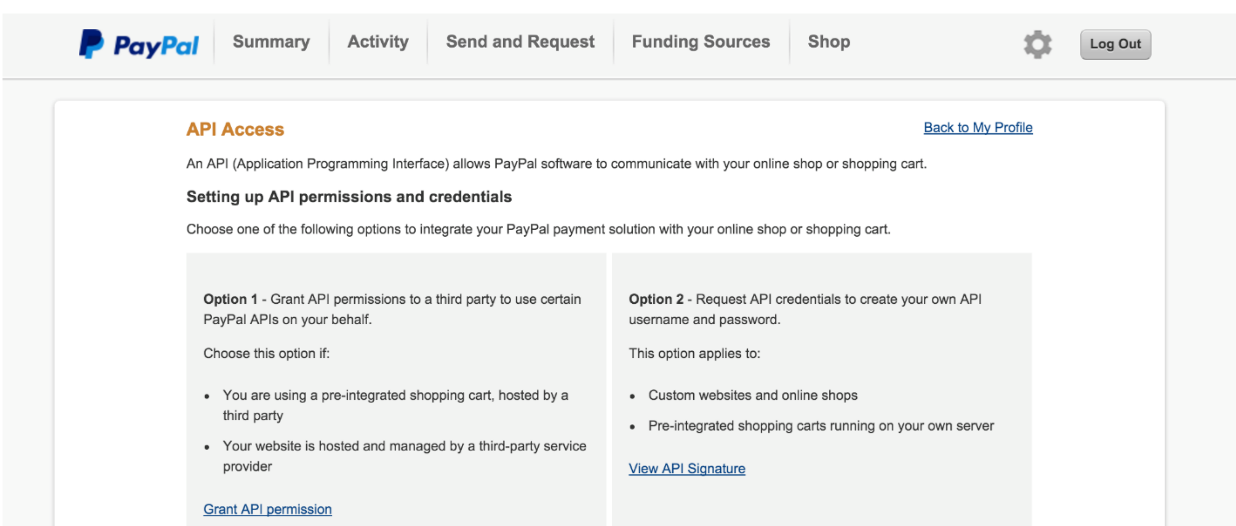
- Login to PayPal Account and go to profile



- From My Selling Tools go to api Access



- On API Access Page, choose option 2 to generate API credentials



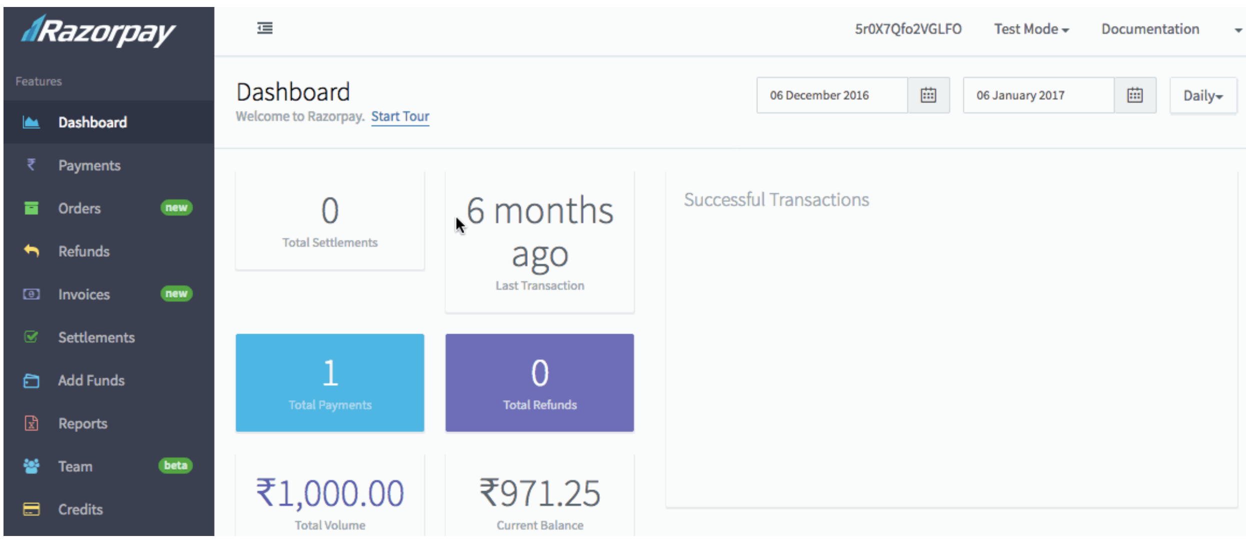
1.3 Topic: RazorPay Integration

1. RazorPay Integration

A payment gateway is an e-commerce application service provider service that authorizes credit card payments for e-businesses, online retailers, bricks and clicks, or traditional brick and mortar.

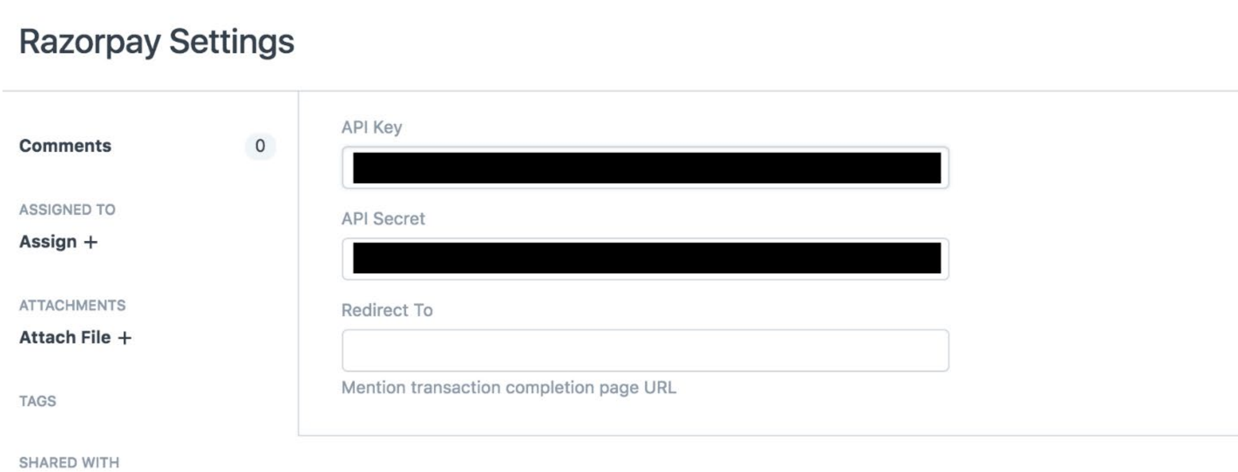
A payment gateway facilitates the transfer of information between a payment portal (such as a website, mobile phone or interactive voice response service) and the Front-End Processor or acquiring bank.

To setup RazorPay: Explore > Integrations > RazorPay Settings

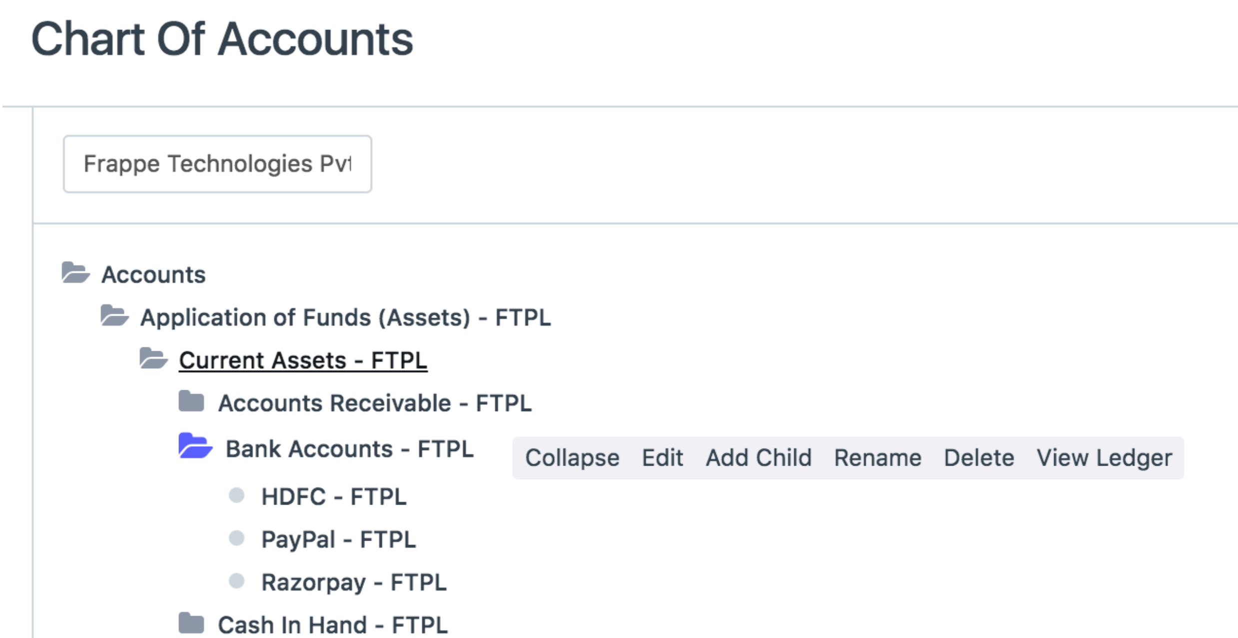


Setup RazorPay

To enable RazorPay payment service, you need to configure parameters like API Key, API Secret



On enabling service, the system will create Payment Gateway record and Account head in the Chart of Account with account type as Bank.



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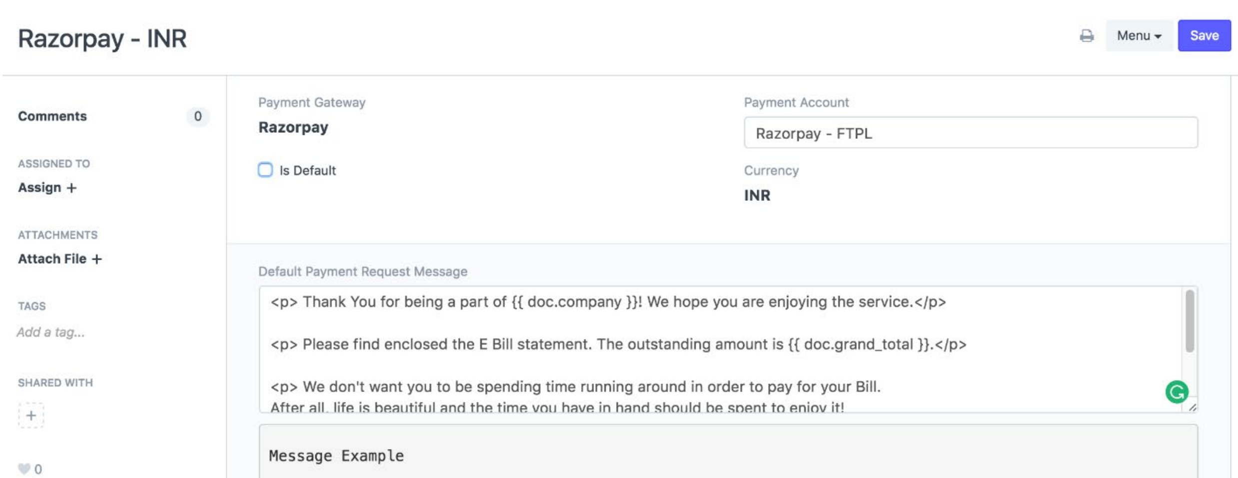


After enabling service and configuring Payment Gateway Account your system is able to accept online payments.

Supporting transaction currencies

RazorPay will only work for the company having INR (Indian Rupee) as a Currency.

1.4 Topic: DropBox Backup

1. Setting Up Dropbox Backups

We always recommend customers to maintain backup of their data in ERP+. The database backup is downloaded in the form of an SQL file. If needed, this SQL file of backup can be restored in the other ERP+ account as well.

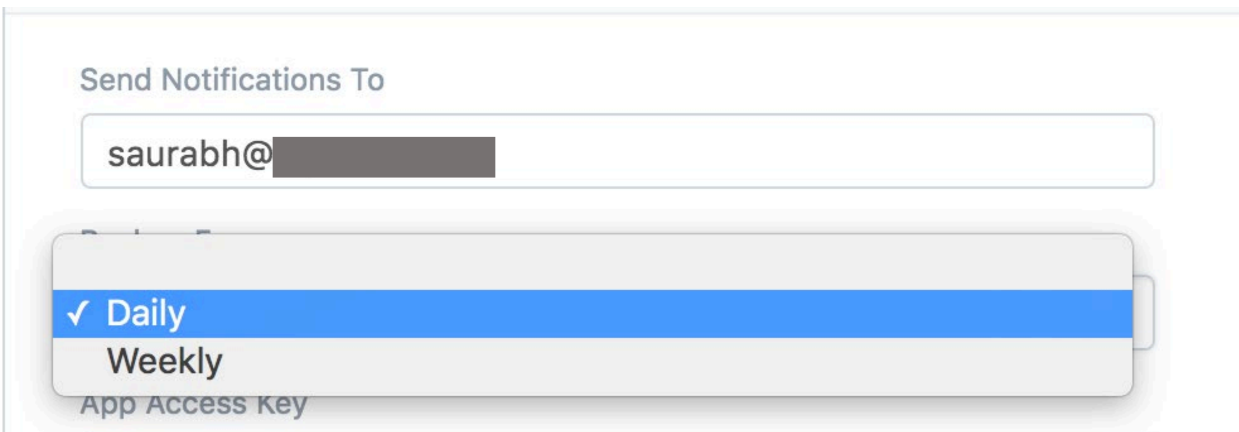
You can automate database backup download of your ERP+ account into your Dropbox account.

To setup Dropbox Backup, Explore > Integrations > Dropbox Settings

ERP+ Managed Version Instructions

Step 1: Set Frequency

Set Frequency to download backup in your Dropbox account.

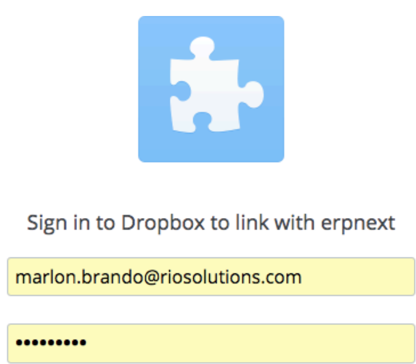


Step 2: Allow Dropbox Access

After setting frequency and updating other details, click on Allow Dropbox access. On clicking this button, the Dropbox login page will open in the new tab. This might require you to allow pop-up for your ERP+ account.

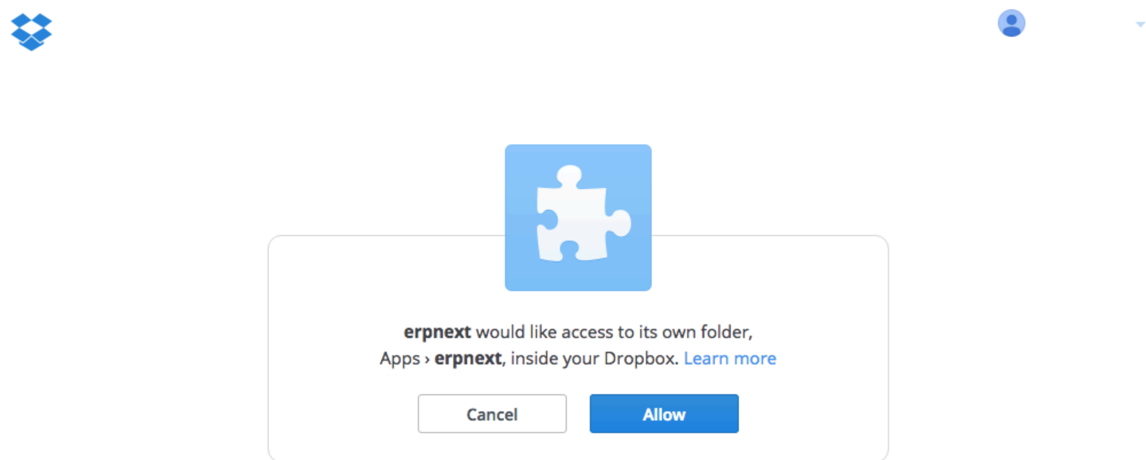
Step 3: Login to Dropbox

Login to your Dropbox account by entering login credentials.



Step 4: Allow

On successful login, you will find a confirmation message as following. Click on "Allow" to let your ERP+ account have access to your Dropbox account.



With this, a folder called "ERP+" will be created in your Dropbox account, and database backup will start to auto-download in it.

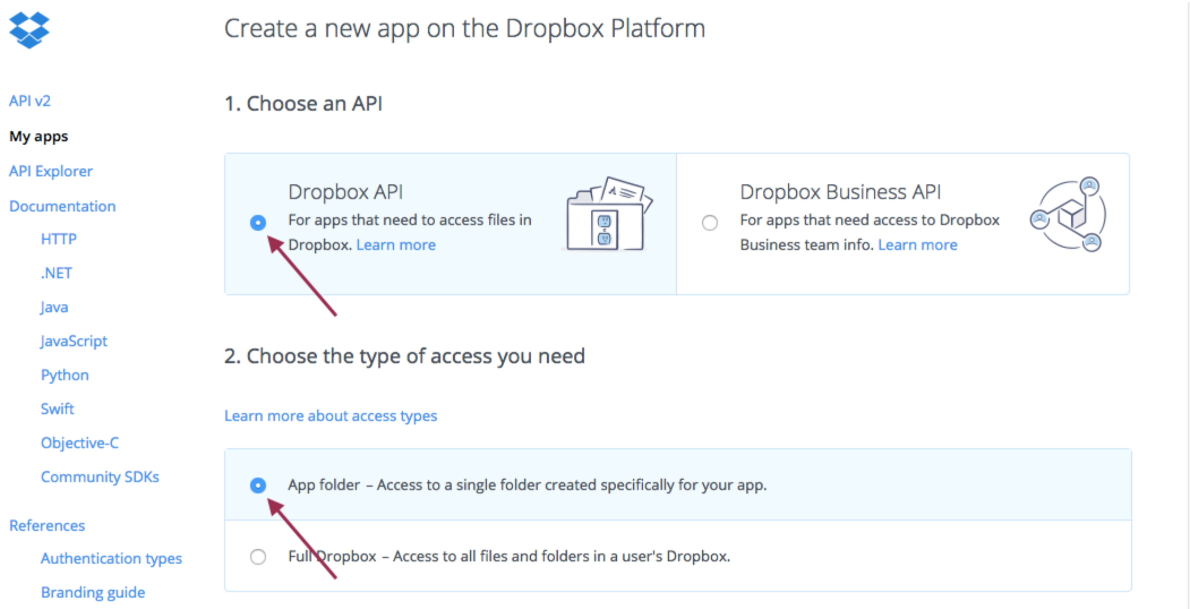
Open Source Version Instructions

Step 1: Login to Dropbox Developer area

https://www.dropbox.com/developers/apps

Step 2: Create a new Dropbox app

Step 3: Fill in the details for your new app



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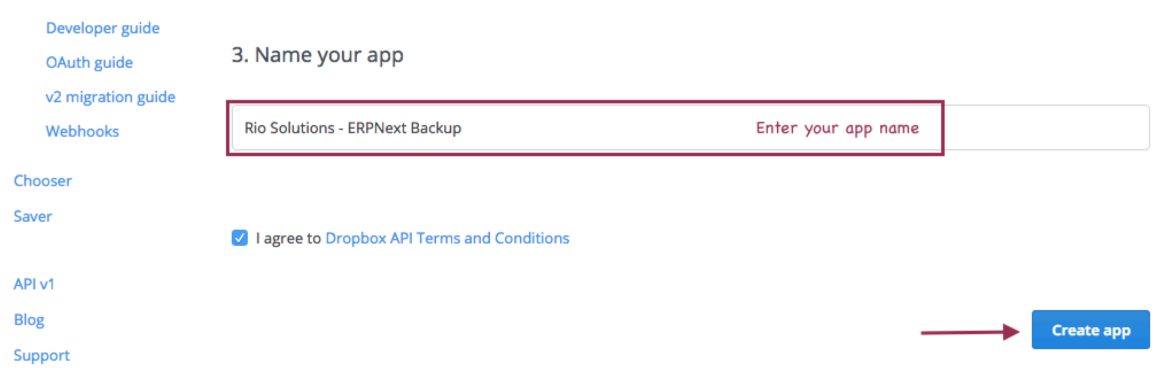
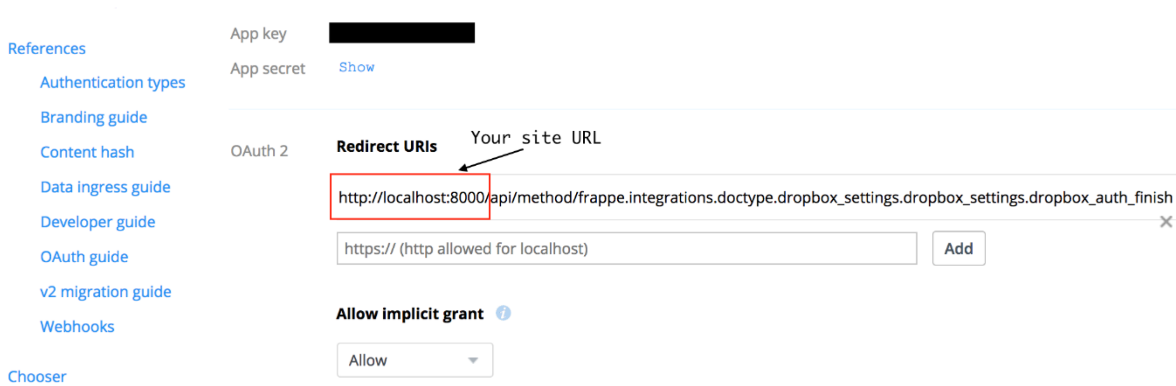


Step 4: Insert your custom domain Redirect URI

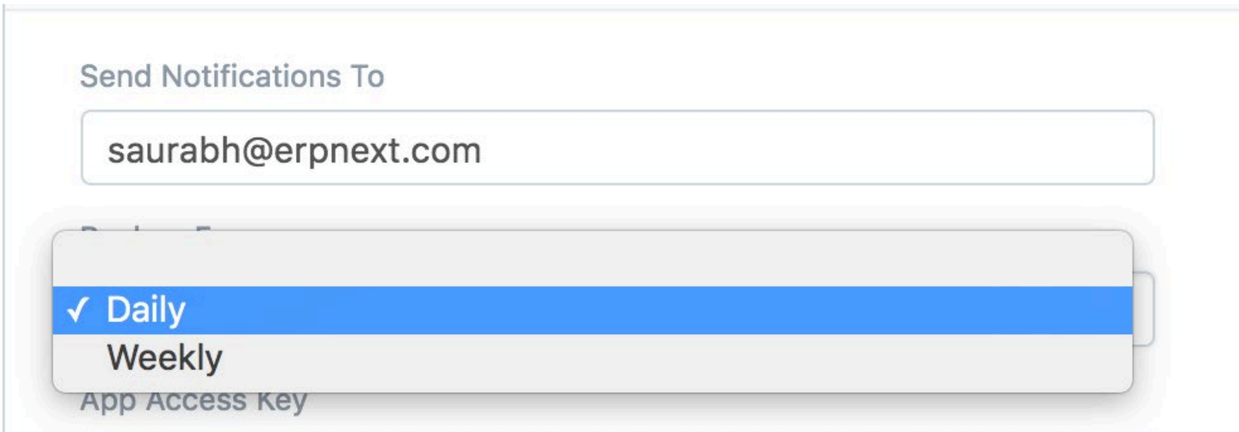
https://{yourwebsite.com}/api/method/frappe.integrations.doctype.dropbox_settings.dropbox_settings.dropbox_auth_finish



Step 5: In a new window, open the Dropbox Settings page in your ERP+ installation

Step 6: Set backup frequency and email

Set the frequency to download your site backups to your Dropbox account.



Step 7: Input Keys from your Dropbox App window

From your Dropbox App page, enter the app key and (unhidden) app secret into the ERP+ Dropbox settings page.

Alternatively, you can enter it manually in sites/{sitename}/site_config.json as follows,

```
{
"db_name": "demo",
"db_password": "DZ1Idd55xJ9qvkHvUH",
"dropbox_access_key": "ACCESSKEY",
"dropbox_secret_key": "SECRECTKEY"
}
```

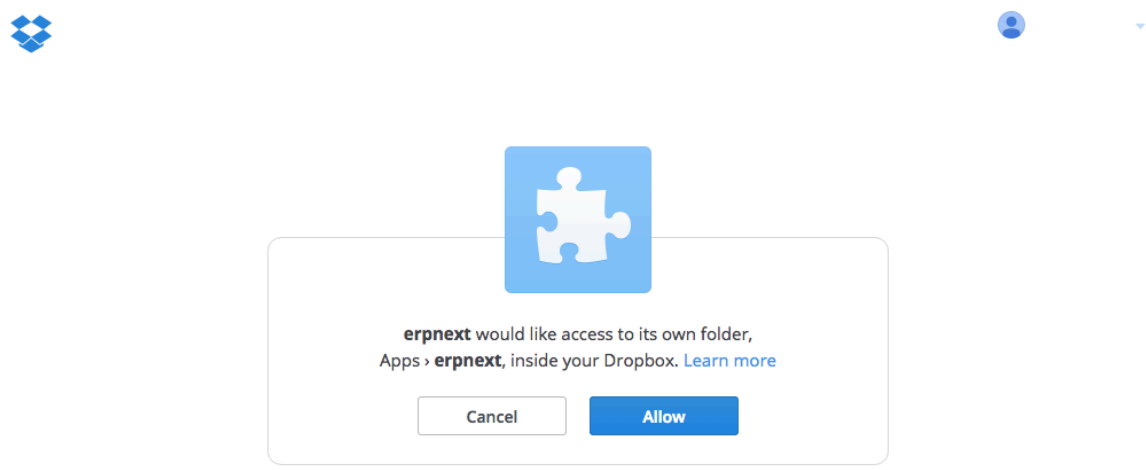
Step 8: Click Save before continuing!!!

Step 9: After saving, click "Allow Dropbox Access"

The Dropbox login page will open in the new tab. This might require you to allow pop-up for your ERP+ account.

Step 11: Allow Dropbox Access

On successful login, you will find a confirmation message as following. Click on "Allow" to let your ERP+ account have access to your Dropbox account.



Step 12: Confirm Backups Work

From the ERP+ Dropbox page, click Take Backup Now and then go to you Dropbox files view. You should see a new folder in Dropbox named Apps and inside of it your {New App} folder. Inside of it should be backup folders for both files and database.

So, for an app named ERP+, following are the folder locations:

Database files: /Apps/ERP+/database

Public files: /Apps/ERP+/files

Private files: /Apps/ERP+/private/files

1.5 Topic: LDAP Integration

1. Setting up LDAP

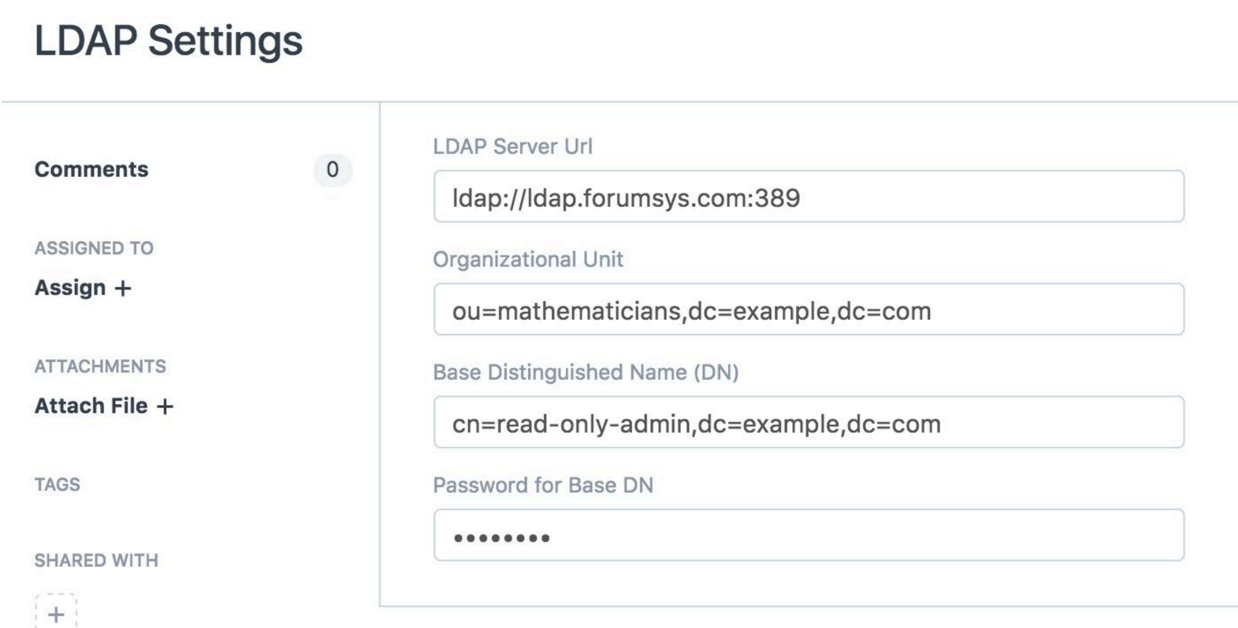
Lightweight Directory Access Protocol is a centralized access control system used by many small and medium scale organizations.

By settings up LDAP service, you able to login to ERP+ account by using LDAP credentials.

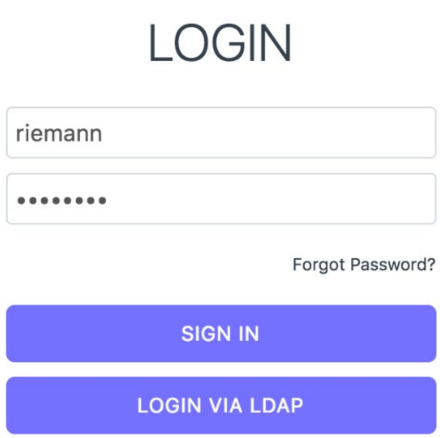
To setup LDAP, go to: Explore > Integrations > LDAP Settings

Setup LDAP

To enable LDAP service, you need to configure parameters like LDAP Server URL (including ldap://), Organizational Unit, UID, Base Distinguished Name (DN) and Password for Base DN



After setting up LDAP parameters, on login screen, the system enables **Login Via LDAP** option.



For the extended fields, try these settings:

```
LDAP Search String: uid={0}
```

```
LDAP First Name Field: cn
```

```
LDAP Email Field: mail
```

```
LDAP Username Field: uid
```

The default role of a new LDAP user is Blogger. You might want to adapt the permissions of that role with the permission manager.

Connecting to LDAP Securely

In the LDAP Settings area, there are two dropdowns. 1. SSL/TLS Mode - set this to **StartTLS** to connect to your LDAP server using StartTLS. If your LDAP server does not support StartTLS, setting this to StartTLS will result in an error StartTLS is not supported. Check the configuration on your LDAP server if you receive this error. 2. Require Trusted Certificate - if you change this to **Yes,** then the certificate provided by the LDAP server must be trusted by the Frappe/ERP+ server. If you would rather use StartTLS with a self-signed (untrusted) certificate, set this to **No**. If you do not use StartTLS, this setting is ignored.

1.6 Topic: Braintree Integration

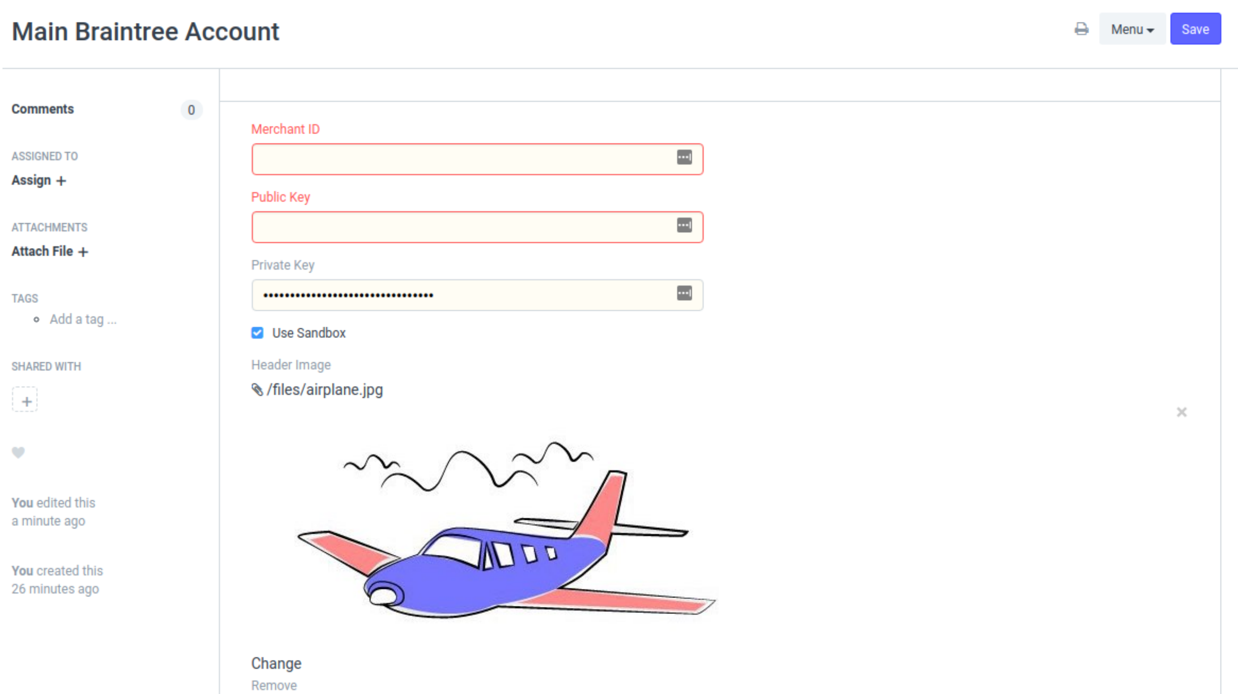
1. Setting up Braintree

To setup Braintree, go to Explore > Integrations > Braintree Settings

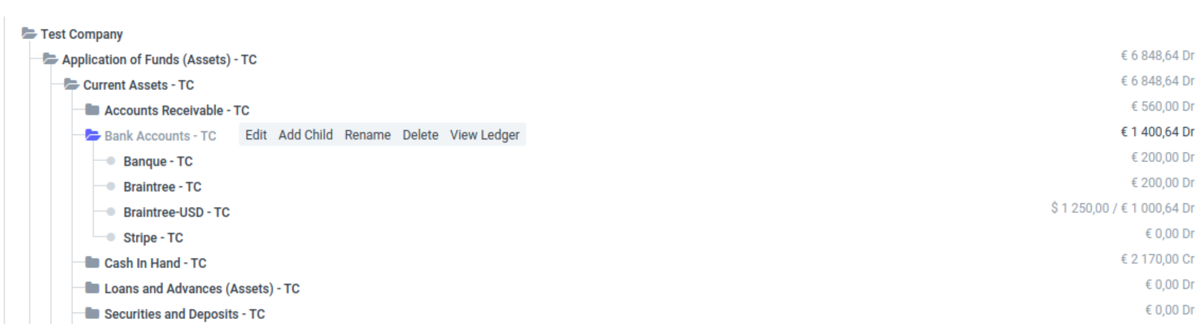
Setup Braintree
To enable Braintree in your ERP+ account, you need to configure the following parameters:

- Merchant ID
- Public Key
- Private Key

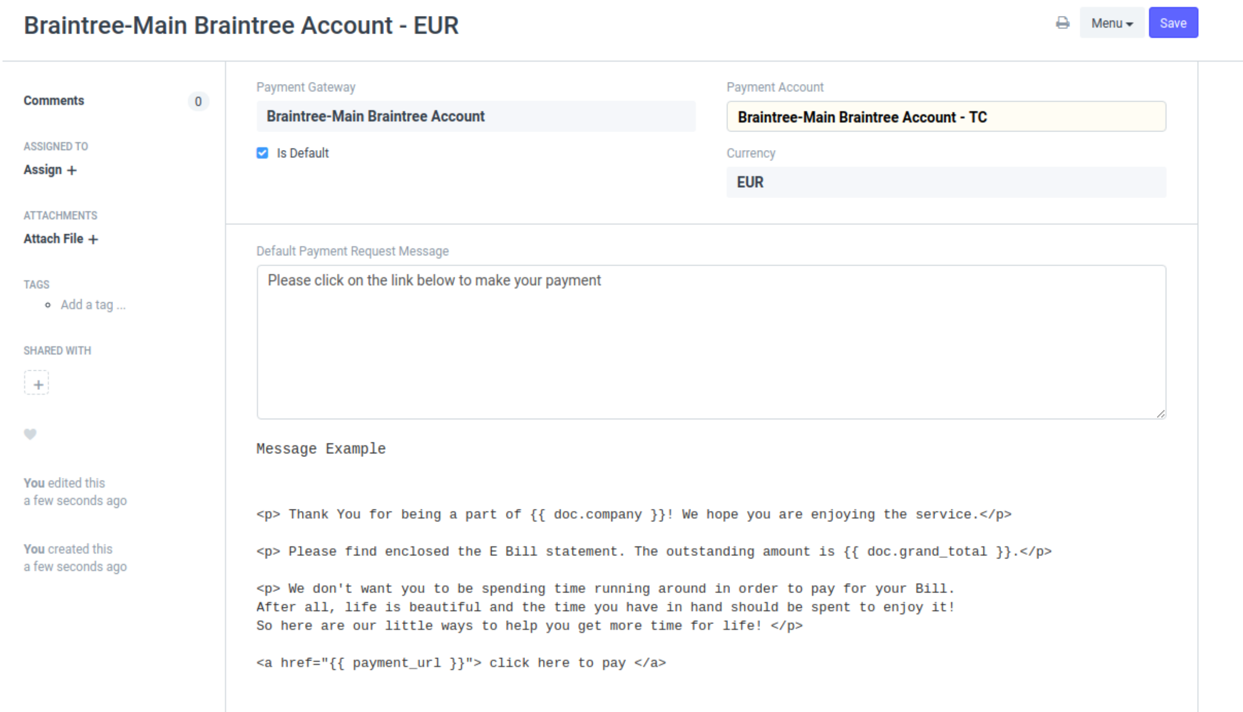
You can setup several Braintree payment gateways if needed. The choice of payment gateway account will determine which Braintree account is used for the payment.



On enabling service, the system will create Payment Gateway record and an Account head in chart of account with account type as Bank.



It will also create a payment gateway account. You can change the default bank account if needed and create a template for the payment request.



After configuring the Payment Gateway Account, your system is able to accept online payments through Braintree.

1.7 Topic: GoCardless Integration

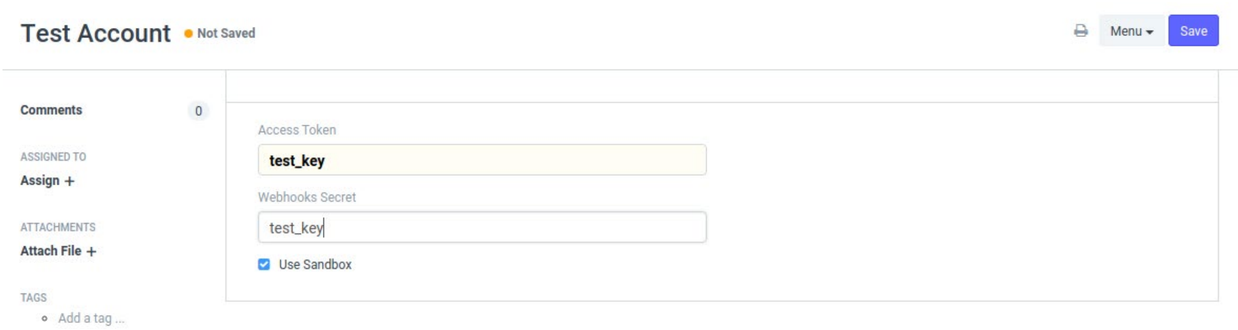
1. Setting up GoCardless

To setup GoCardless, go to Explore > Integrations > GoCardless Settings

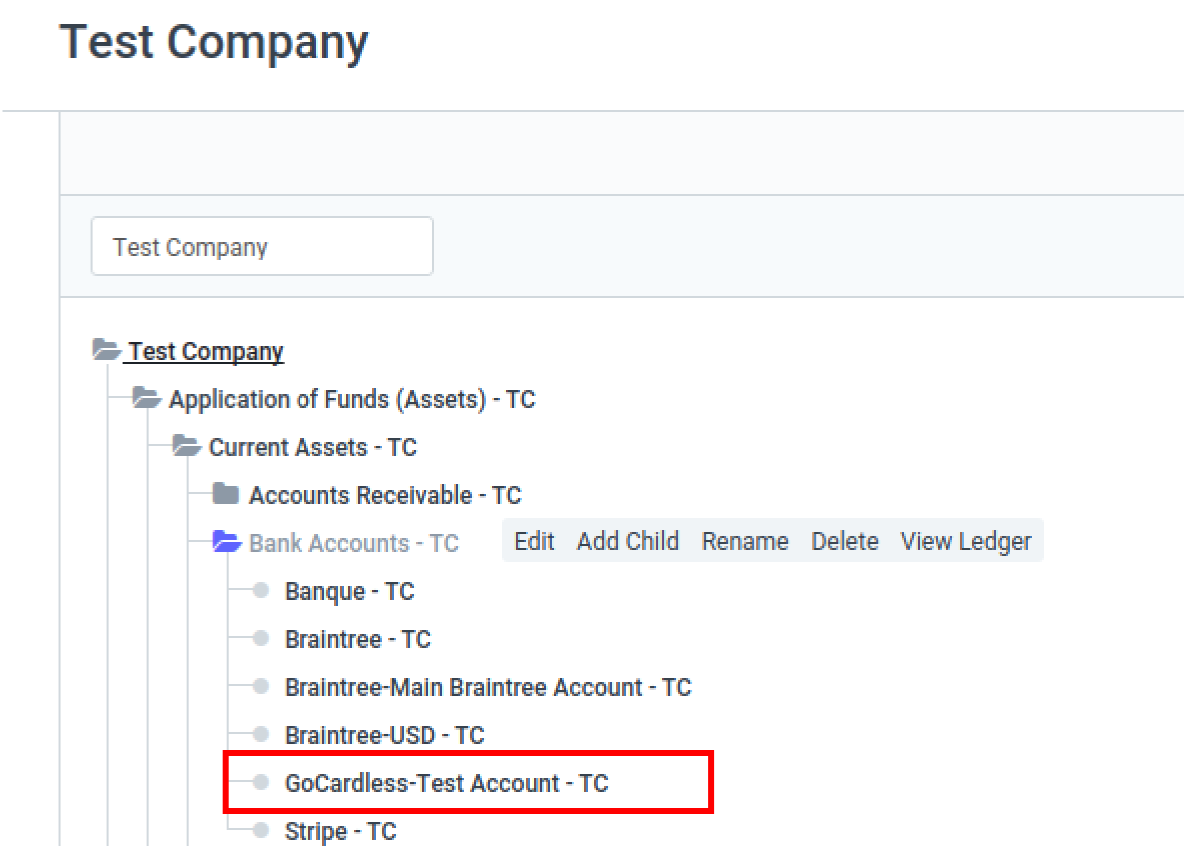
Setup GoCardless

To enable GoCardless in your ERP+ account, you need to configure the following parameters and Access Token and optionally (but highly recommended), a Webhooks Secret key.

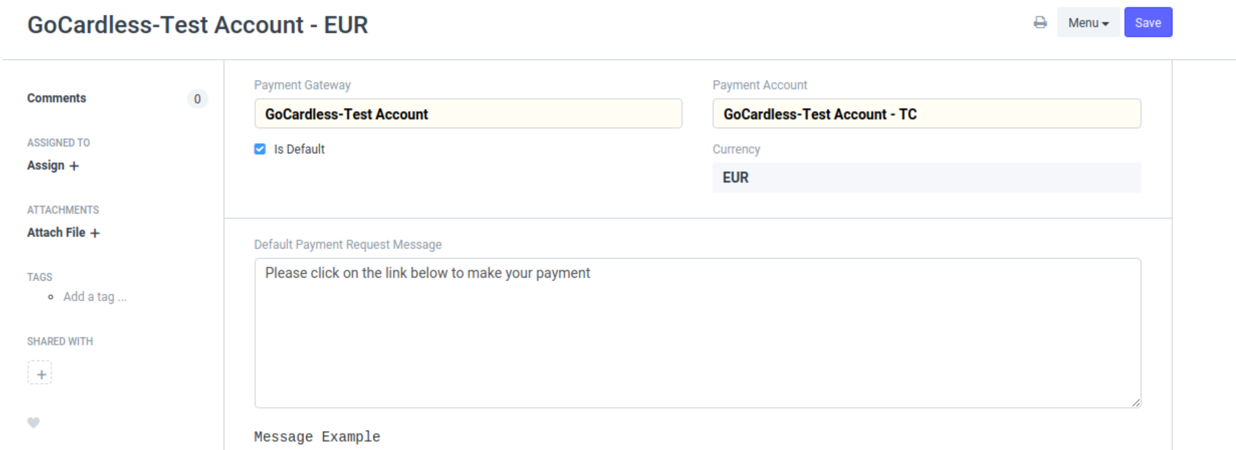
You can setup several GoCardless payment gateways if needed. The choice of payment gateway account will determine which GoCardless account is used for the payment.



On enabling service, the system will create a Payment Gateway record and an Account head in chart of account with account type as Bank.



It will also create a payment gateway account. You can change the default bank account if needed and create a template for the payment request.



After configuring the Payment Gateway Account, your system is able to accept online payments through GoCardless.

SEPA Payments Flow

When a new payment SEPA payment in initiated, the customer is asked to enter his IBAN (or local account number) and to validate a SEPA mandate.

Upon validation of the mandate, a payment request is sent to GoCardless and processed.

If the customer has already a valid SEPA mandate, when instead of sending a payment request to the customer, the payment request is directly sent to GoCardless without the need for the customer to validate it. The customer will only receive a confirmation email from GoCardless informing him that a payment has been processed.

Mandate Cancellation

You can setup a Webhook in GoCardless to automatically disabled cancelled or expired mandates in ERP+.

The Endpoint URL of your webhook should be:
https://yoursite.com/api/method/ERP+.ERP+*integrations.doctype.gocardless*settings.webhooks

In this case do not forget to configure your Webhooks Secret Key in your GoCardless account settings in ERP+.

Supported transaction currencies

```
"EUR", "DKK", "GBP", "SEK"
```

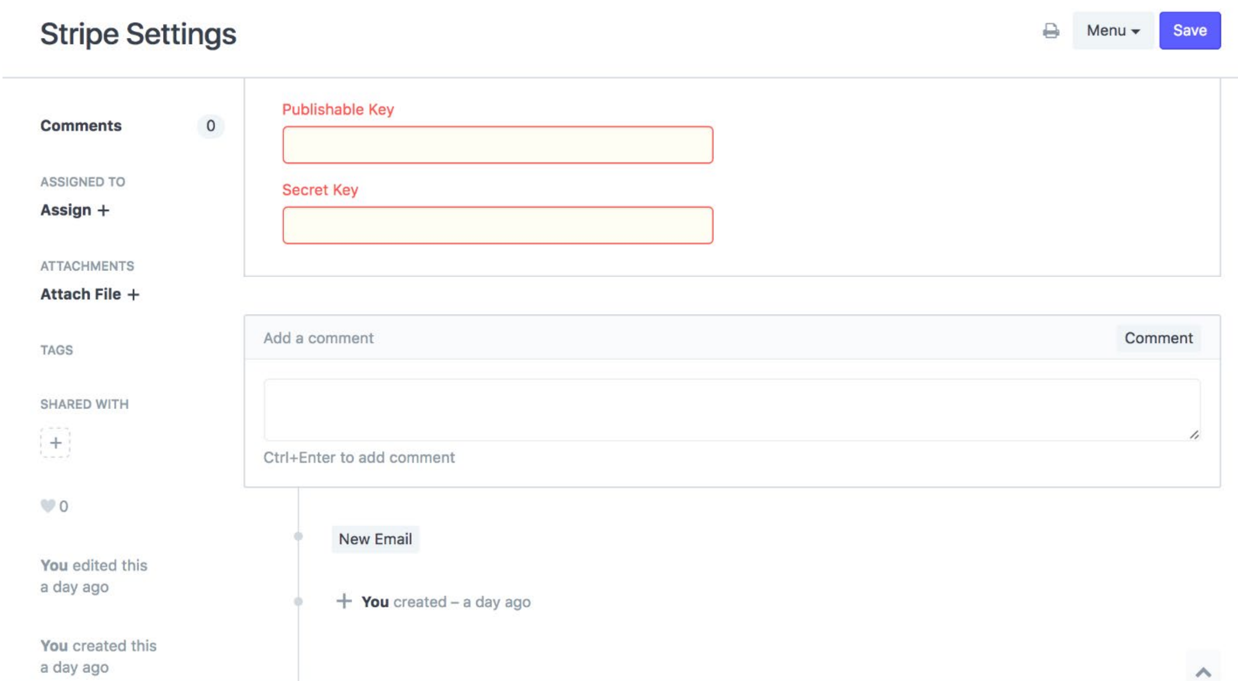
1.8 Topic: Stripe Integration

1. Setting up Stripe

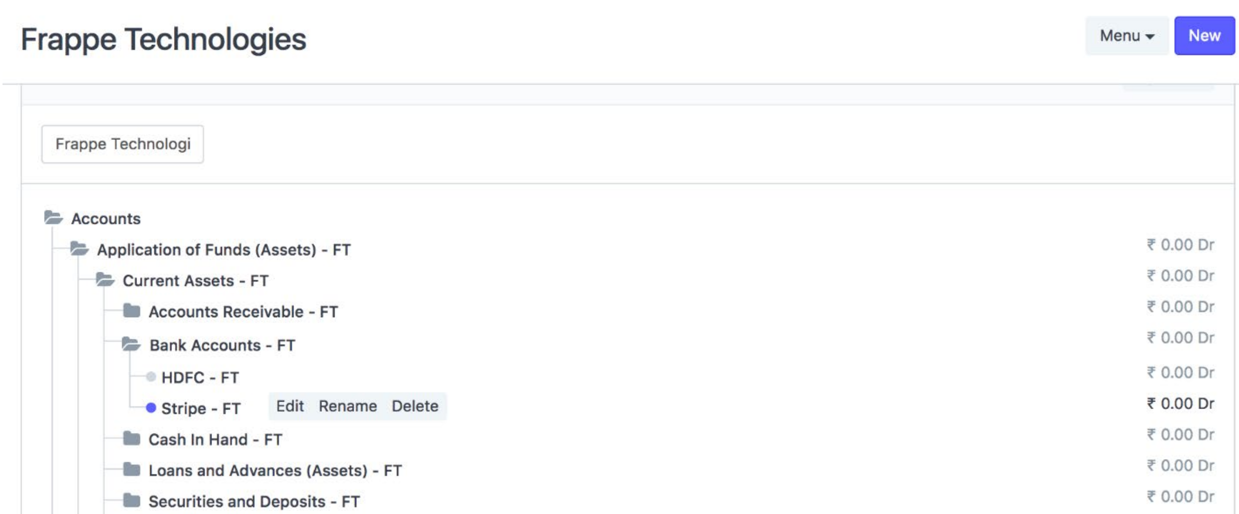
To setup Stripe, Explore > Integrations > Stripe Settings

Setup Stripe

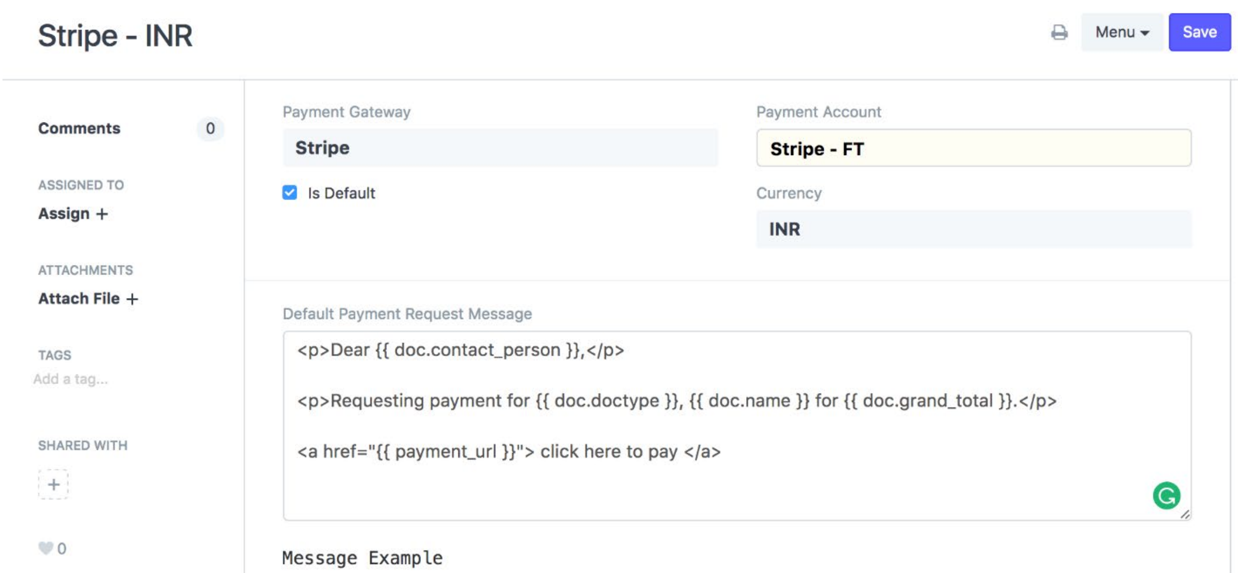
To enable Stripe payment service, you need to configure parameters like Publishable Key, Secret Key



On enabling service, the system will create Payment Gateway record and Account head in chart of account with account type as Bank.



Also, it will create Payment Gateway Account entry. Payment Gateway Account is configuration hub from this you can set account head from existing COA, default Payment Request email body template.

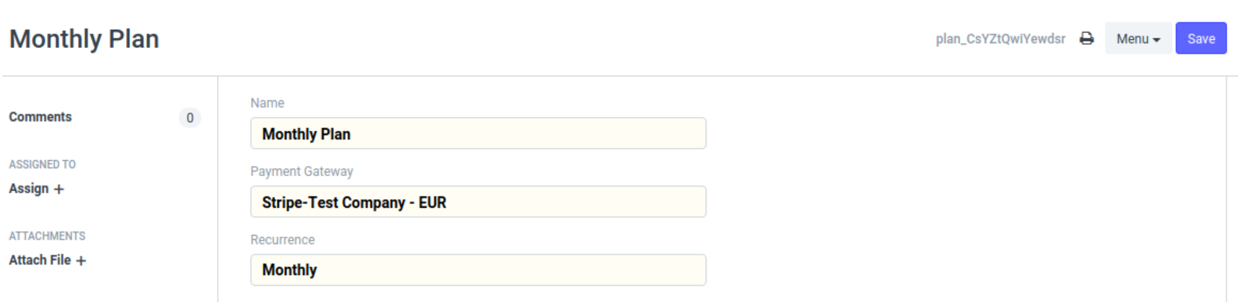


After configuring Payment Gateway Account your system is able to accept online payments.

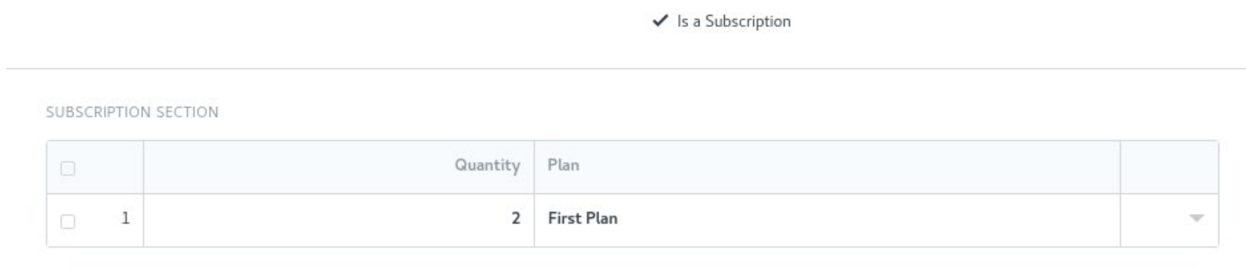
Setup subscriptions plans

If you need to bill a recurring amount instead of a one-time charge, you can use Stripe's subscription system.

Once you have created your billing plans in Stripe, add one or several new "Payment Plan" in Frappe.



Afterwards, when you create your payment request, click the check field "Is a subscription" and add the system will fetch the corresponding subscription plans from within the corresponding subscription.



ERP+ will automatically create a new subscription for this customer in Stripe.

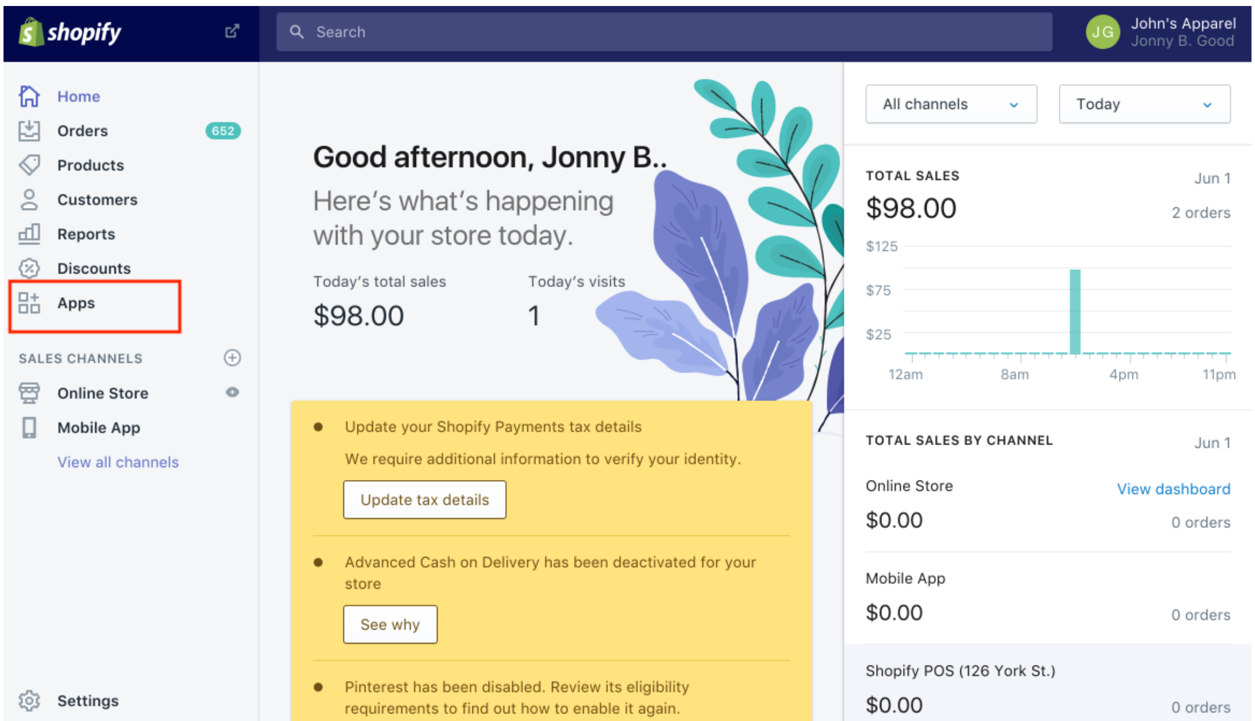
1.9 Topic: Shopify Integration

Shopify Integration

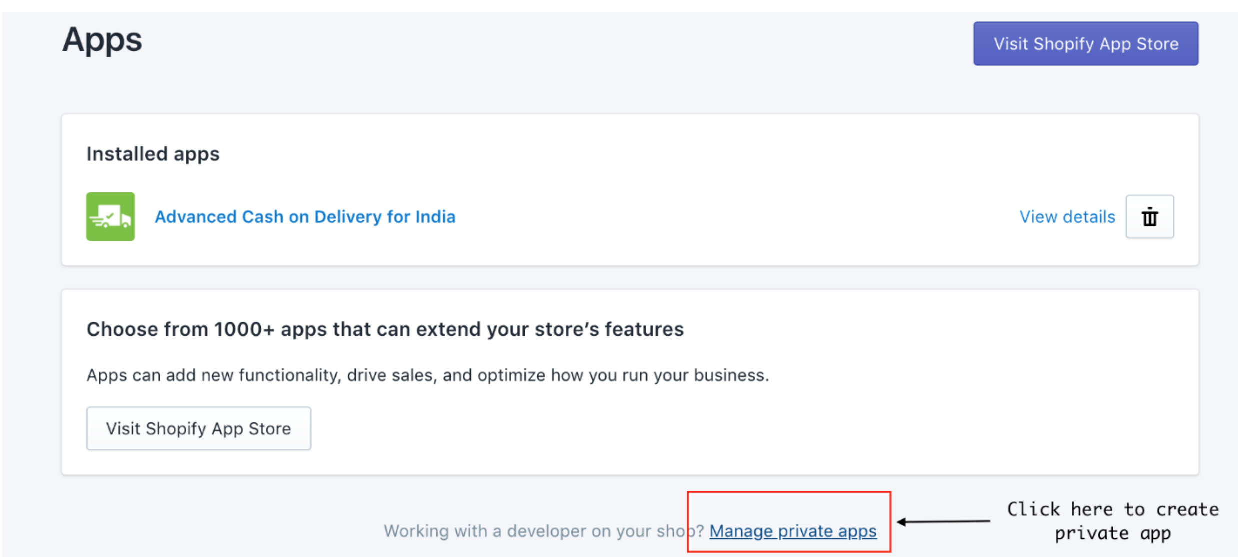
The Shopify Connector pulls the orders from Shopify and creates Sales Order against them in ERP+. While creating the sales order if Customer or Item is missing in ERP+ the system will create new Customer/Item by pulling respective details from Shopify.

Create A Private App in Shopify

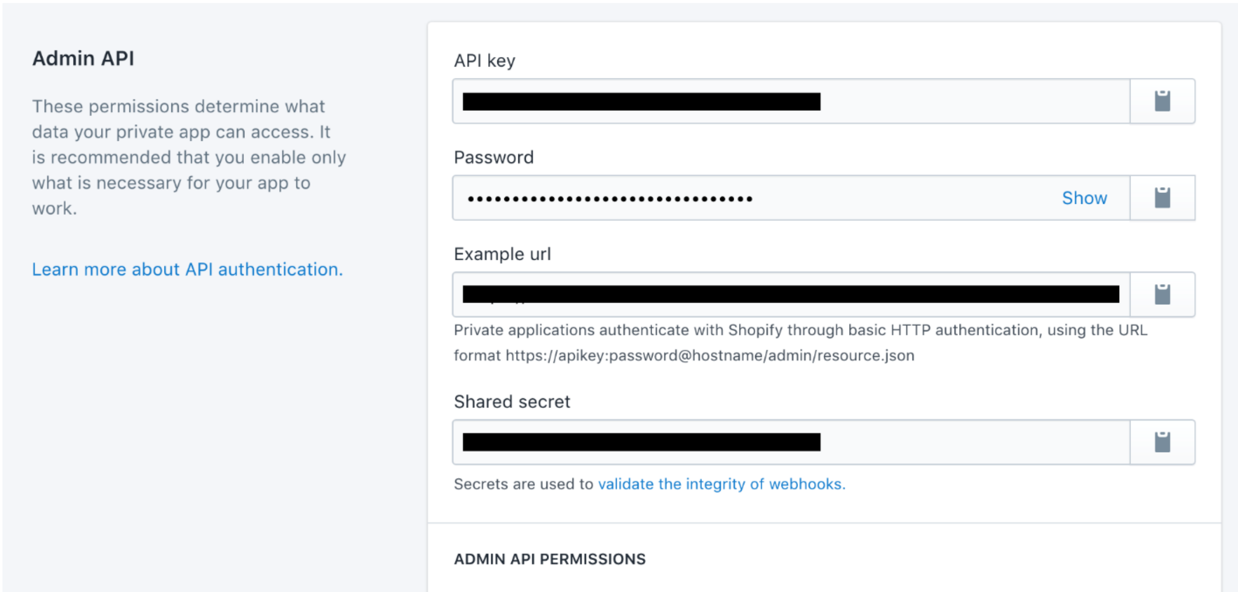
1. Click on Apps in menu bar



2. Click on **Manage private apps** to create private app



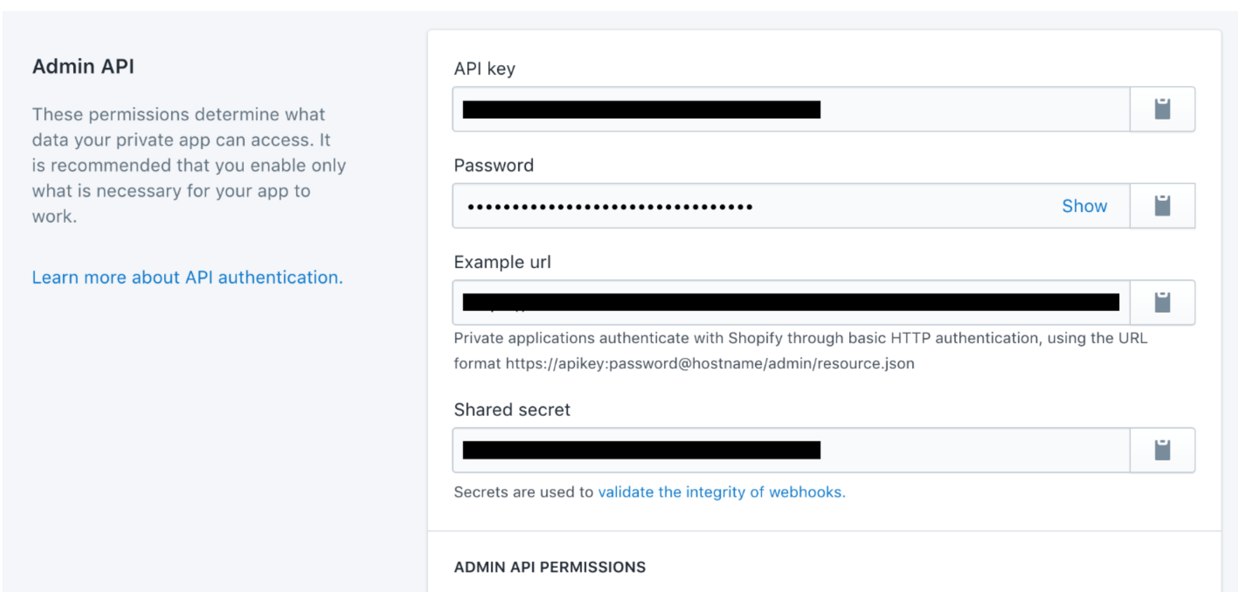
3. Fill up the details and create app. Each app has its own API key, Password and Shared secret



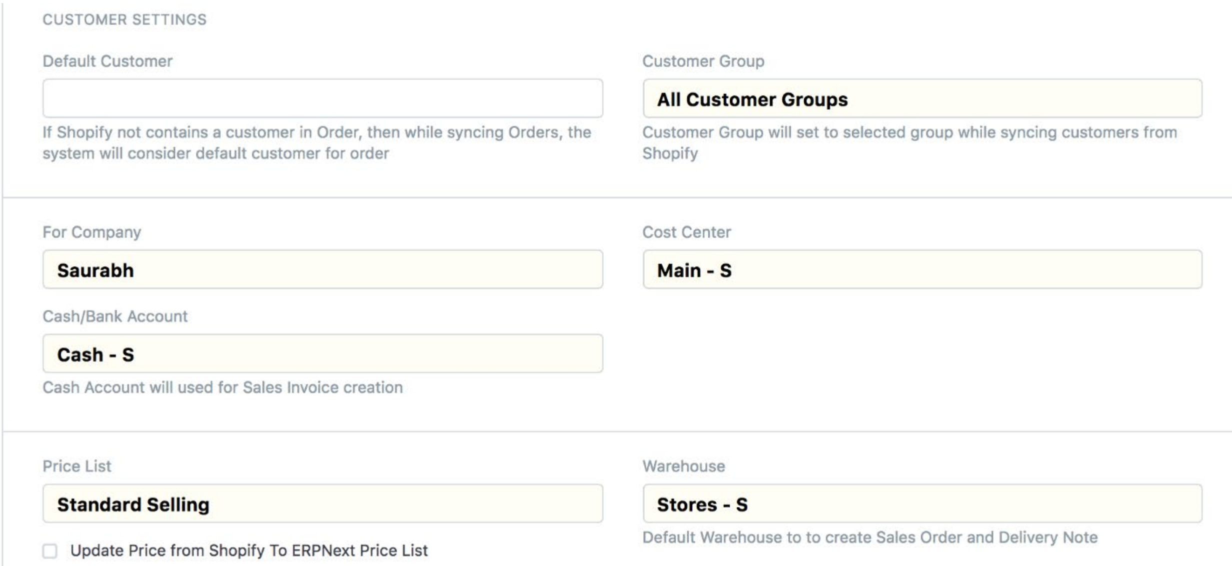
Setting Up Shopify on ERP+

Once you have created a Private App on Shopify, setup App Credentials and other details in ERP+.

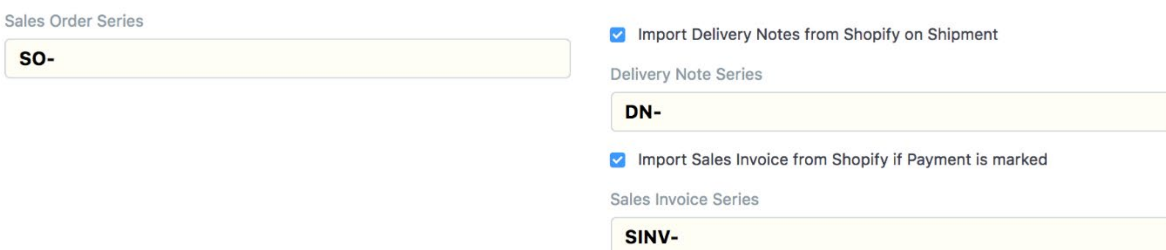
1. Select App Type as Private and Fill-up API key, Password and Shared Secret from Shopify's Private App.



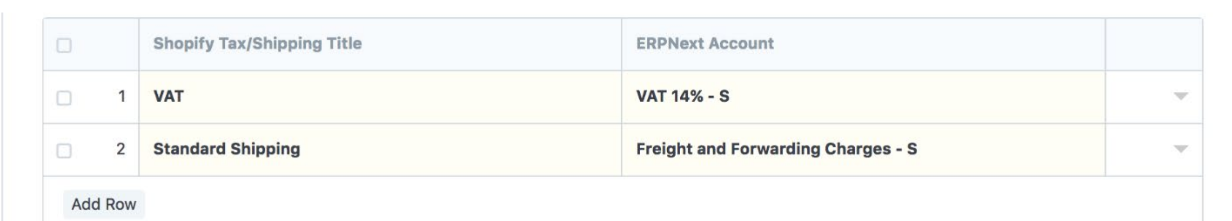
2. Setup Customer, Company and Inventory configurations



3. Setup Sync Configurations. The system pulls Orders from Shopify and creates Sales Order in ERP+. You can configure ERP+ system to capture payment and fulfilments against orders.



4. Setup Tax Mapper. Prepare tax and shipping charges mapper for each tax and shipping charge you apply in Shopify



After setting up all the configurations, enable the Shopify sync and save the settings. This will register the API's to Shopify and the system will start Order sync between Shopify and ERP+.

Note:
The connector won't handle Order cancellation. If you cancelled any order in Shopify then manually you have to cancel respective Sales Order and other documents in ERP+.

1.10 Topic: WooCommerce Integration

1. WooCommerce Integration

Setting Up WooCommerce on ERP+:

1. From Awesome-bar, go to "Woocommerce Settings" doctype.
2. From your woocommerce site, generate "API consumer key" and "API consumer secret" using Keys/Apps tab.
3. Paste those generated "API consumer key" and "API consumer secret" into "Woocommerce Settings" doctype.
4. In "Woocommerce Server URL" paste the URL of your site where ERP+ is installed.
5. Make sure "Enable Sync" is checked.
6. Select Account type from Account Details Section.
7. Click Save.
8. After saving, "Secret" and "Endpoint" are generated automatically and can be seen on "Woocommerce Settings" doctype.
9. Now from your woocommerce site, click on webhooks option and click on "Add Webhook".
10. Give name to the webhook of your choice. Click on Status dropdown and select "Active". Select Topic as "Order Created". Copy the "Endpoint" from "Woocommerce Settings" doctype and paste it in "Delivery URL" field. Copy "Secret" from "Woocommerce Settings" doctype and paste it in "Secret" field. Keep API VERSION as it is and click on Save Webhook.
11. Now the WooCommerce is successful setup on your system.

WooCommerce Integration Working:

1. From your Woocommerce website, register yourself as a user.
2. Now Click on Address Details and provide the required details.
3. For start shopping, click on Shop option and now available products can be seen.
4. Add the desired products into cart and click on View Cart.
5. From Cart, once you have added the desired products, you can click on proceed to checkout.
6. All billing details and Order details can be seen now. Once you are ok with it, click on Place Order button.
7. "Order Received" message can been seen indicating that the order is placed successfully.
8. Now on system where ERP+ is installed check the following doctypes: Customer, Address, Item, Sales Order.