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.

Connect

info@technocom.me
+973 39 394939
www.erpplus.me
www.technocom.me

Document Version: 01.01.2019
Release Date: April 25, 2019

1.3 Basics: Using ERP+

Basics: Using ERP+

We live in an era when people are very comfortable communicating, discussing, asking, assigning work and getting feedback electronically. The Internet acts as a great medium to collaborate on work too. Taking this concept into ERP system, we have designed a bunch of tools whereby you can Assign transactions, manage your To Dos, share and maintain a Calendar, maintain a company wise Knowledge Base, Tag and Comment on transactions and send your Orders, Invoices etc. via Email. You can also send instant messages to other users using the Messaging tool.

These tools are integrated into all aspects of the product so that you can effectively manage your data and collaborate with your co-workers.

1. Topics

1. To Do
2. Restore Deleted Docs
3. Document Versioning
4. Collaborating Around Forms
5. Chat
6. Notes
7. Calendar
8. Assignment
9. Tags

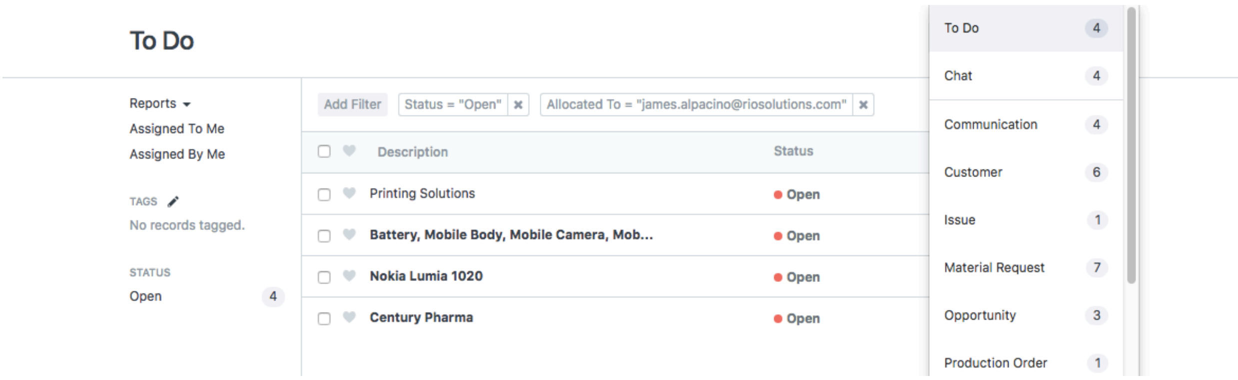
2. Articles

1. Check Link Between Documents
2. Delete Submitted Document
3. Duplicate Record
4. Adding File as an Attachment
5. Merging Documents
6. Bulk Rename
7. Renaming a Document
8. Search Filter
9. Tree Master Renaming
10. Letter Head in The Report
11. Copy Paste Multiple Records from Excel
12. Global Search
13. Adding Attachments to Outgoing Messages

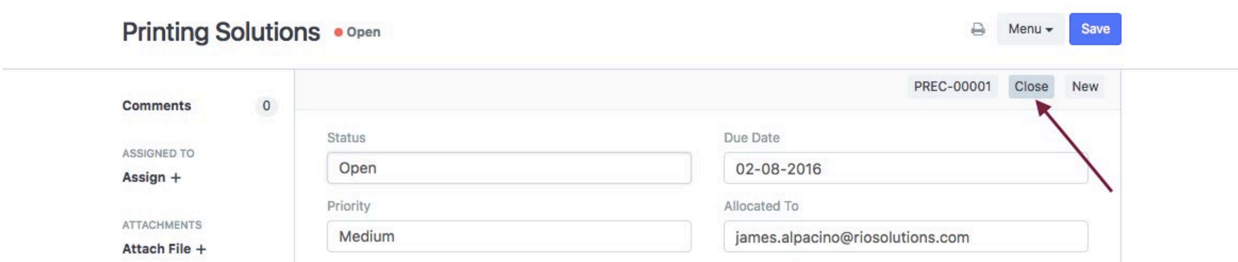
1.1 Topic: ToDo

1. To Do

To Do is a simple tool where all the activities assigned to you and assigned by you are listed. You can also add your own to-do items in the list.



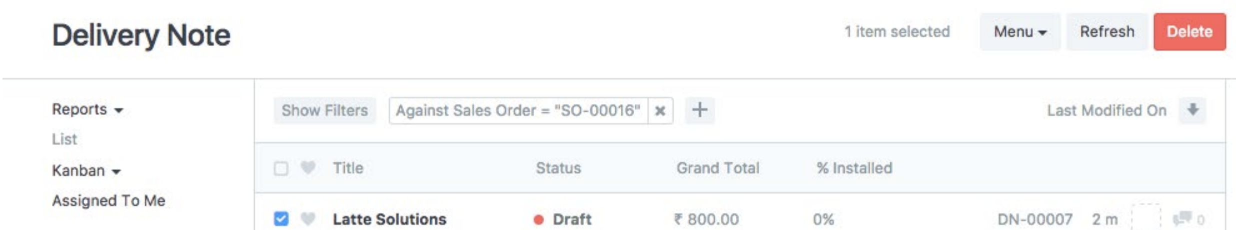
When task is completed, you should simply remove assignment from the assigned document. With this, task will be removed from your ToDo list as well. For ToDo which are not assigned via document, you can set their status as Closed from the ToDo master itself.



1.2 Topic: Restore Deleted Docs

1. Restore Deleted Documents

In ERP+, you can delete a record if not needed. They can be masters like Items, Customer or transactions like Sales Order, Payment Entries etc.



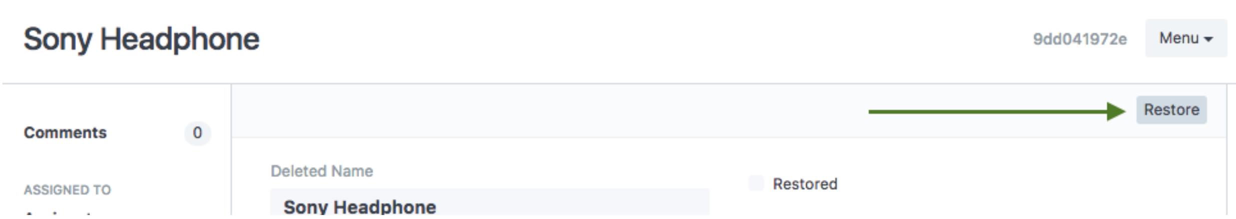
If you have deleted an entry by mistake and wish to restore it back into your ERP+ account.

Only User having System Manager role assigned can restore deleted documents.

Steps below to restore a deleted document.

Step 1: Go to Deleted Documents
For the list of deleted documents, just type Deleted Document in the Search Bar and go to list.

Step 2: Open Doc and Restore
Open the document to be restored from the list. Click on Restore button.



Step 3: Restored
Once a document is restored, you will be able to use it for creating entries in your ERP+ account.

If canceled document is deleted, then it will not be restored.

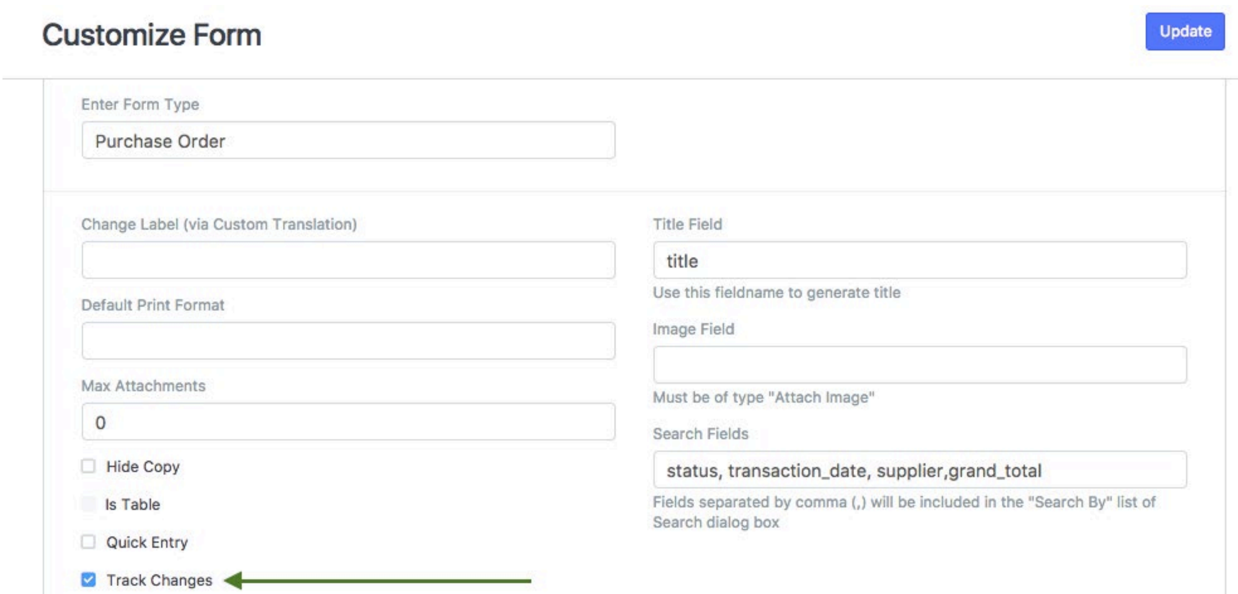
1.3 Topic: Document Versioning

1. Document Versioning

The document versioning feature allows you to track all the changes made in the form over the period. It will be very helpful in audit trial to check which user edited what value, and when exactly.

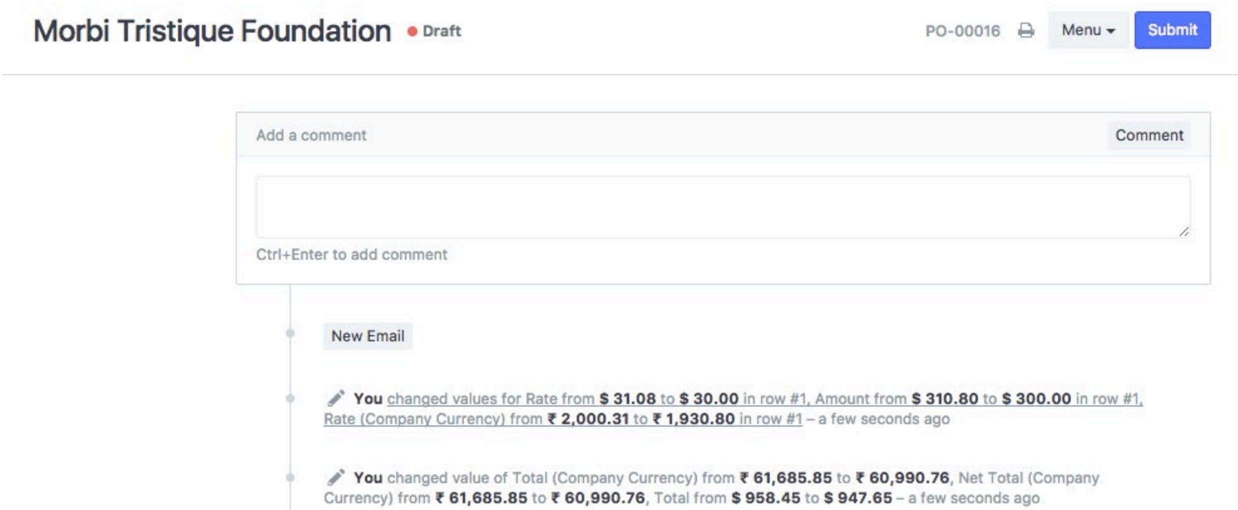
Enable Document Versioning

Document Versioning can be enabled for one Document Type as a time. Let's assume that we need to enable it from Purchase Order. Then, we will check Customize Form tool for Purchase Order and check field Track Changes. With this, document versioning will be enabled for all the Purchase Orders create and edited hence forth.



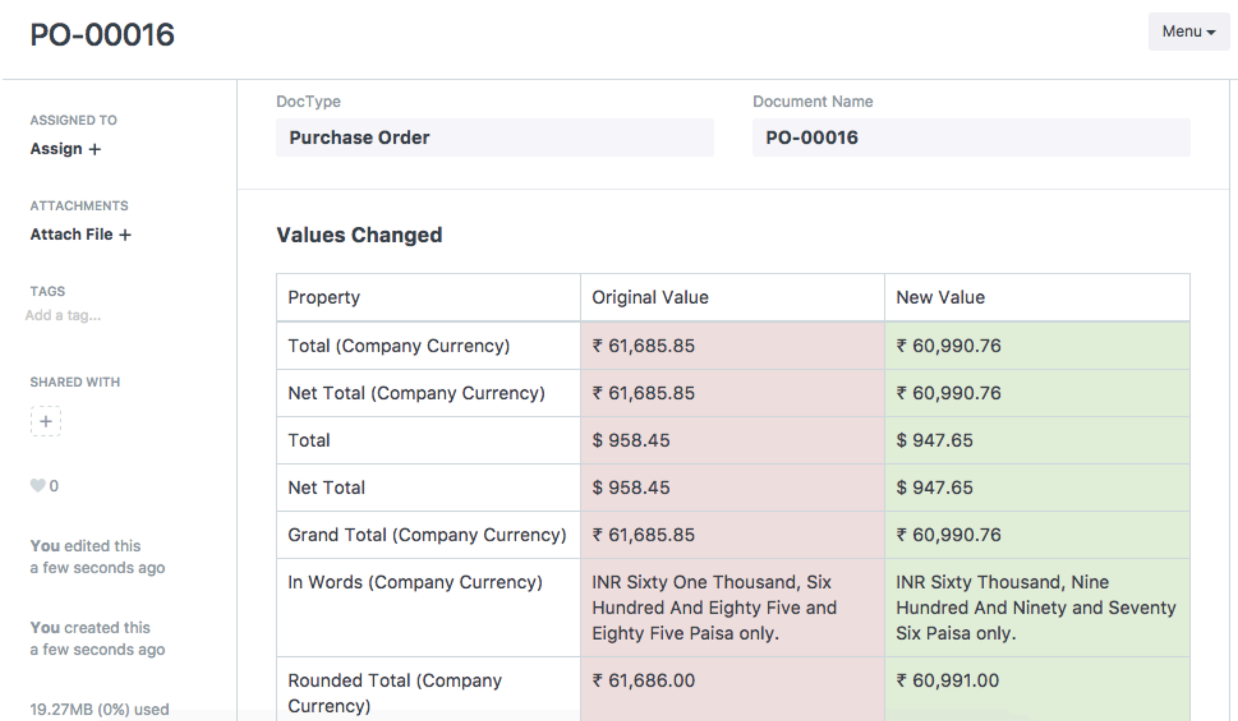
Version Log

Following is link of version in a Purchase Order form. Each time a document is edited, a version's link will be added in that document. To check more details on specific version, click on it's link.



Version Details

In the Version document, you will find log of all the fields and values changes in it.



1.4 Topic: Collaborating Around Forms

1. Collaborating Around Forms

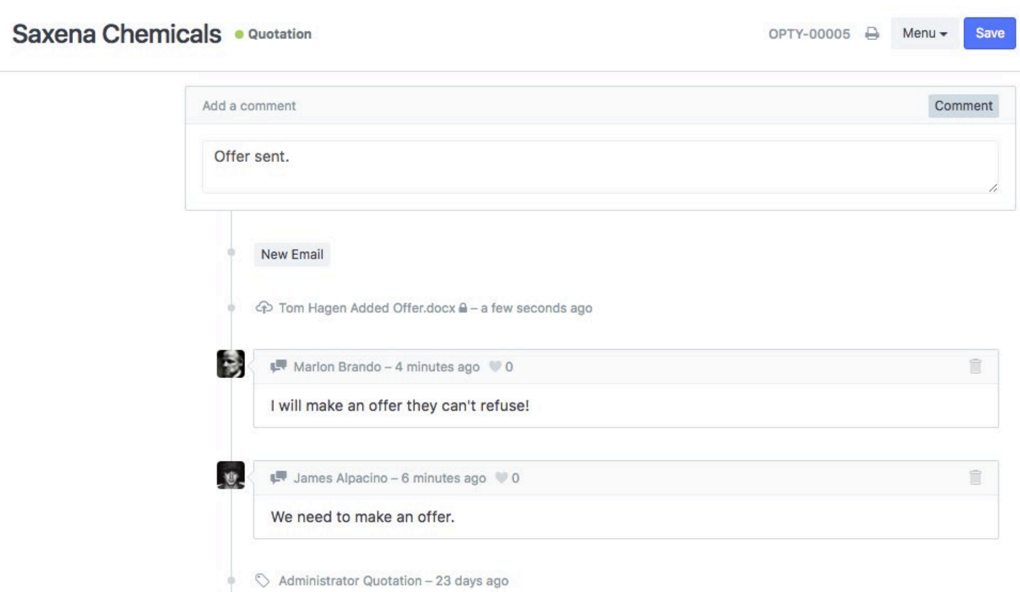
Following are the tools in each document using which you can collaborate with other Users in your ERP+ account.

Assigned to

If some document requires an action from User, you can Assign that document to that User. On assignment, User to whom document is assigned is intimated via email.

Comments

Comments are a great way to add information about a transaction that is not a part of the transactions. Like some background information etc.



Share

You can share document with the specific User. If Document is shared with the specific User, he/she will be able to access it, even if that User doesn't have permission to access that document or Document Type.

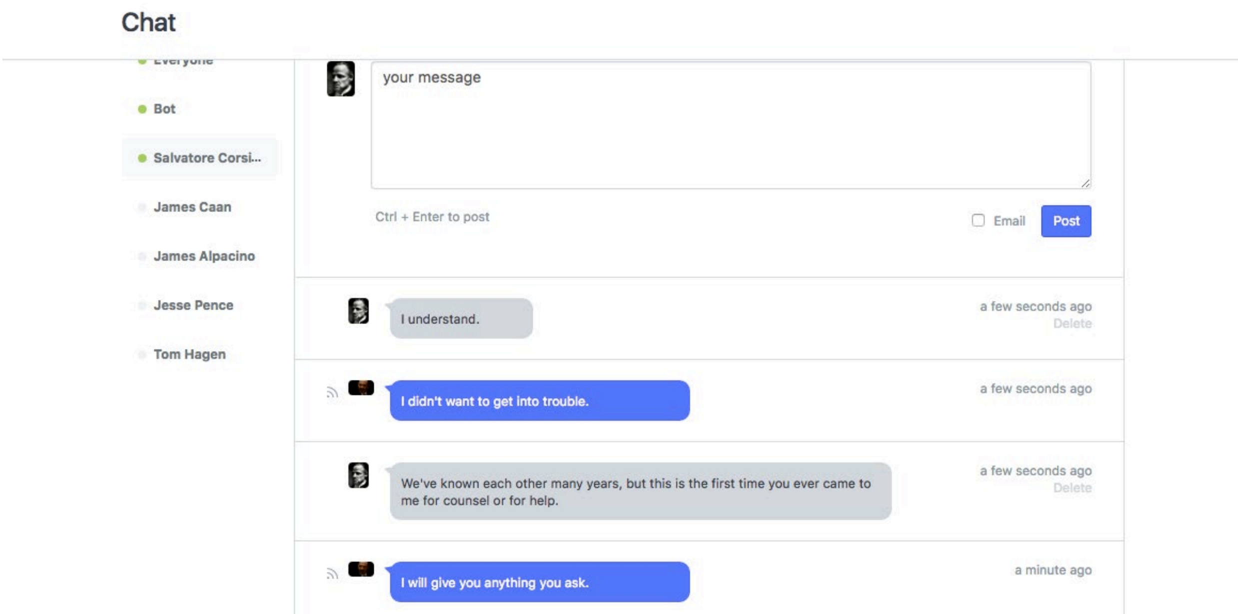
1.5 Topic: Chat

1. Chat

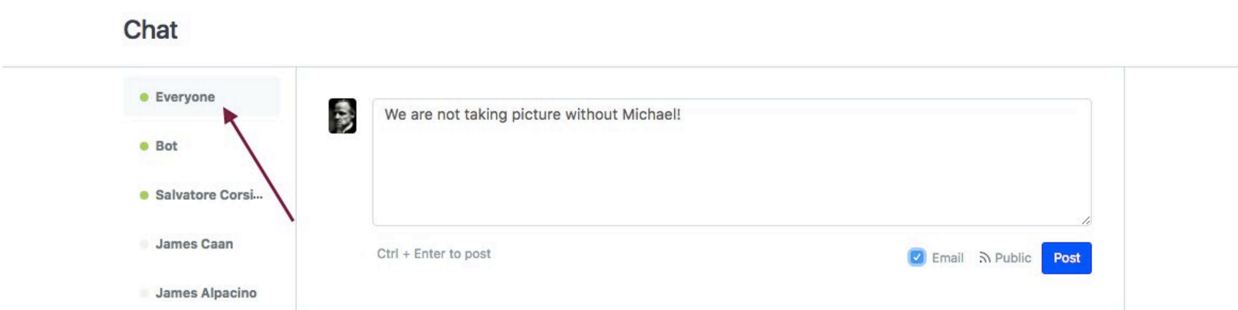
You can send and receive messages from the system by using the Messages tool.

Explore > Tools > Chat

If you send a message to a user, and the user is logged in, it will appear as a popup message and the unread messages counter in the top toolbar will be updated.



You can choose to send message to all the users, or to specific user.



1.6 Topic: Notes

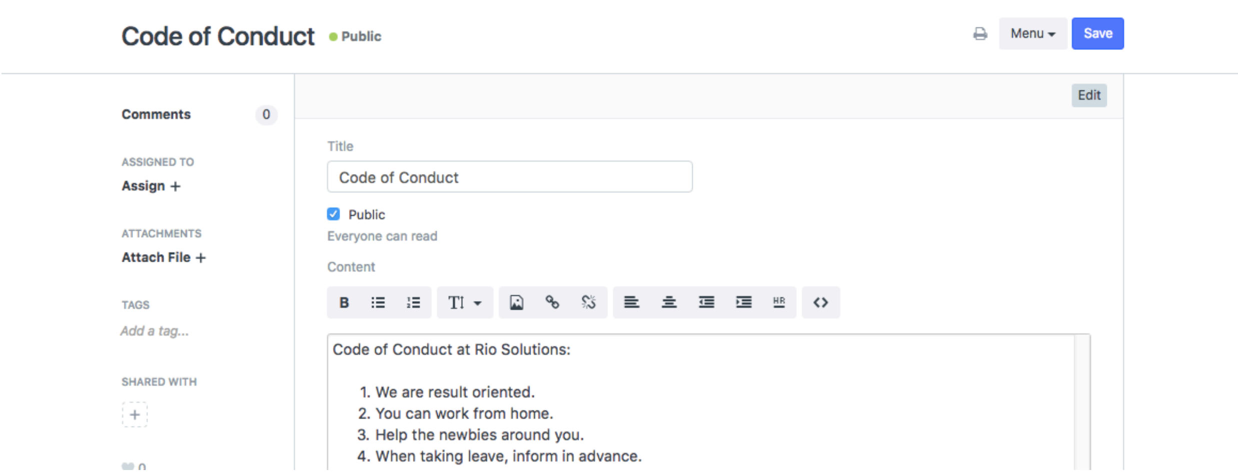
1. Notes

You can store your long notes under this section. It can contain your partner lists, frequently used passwords, terms and conditions, or any other document which needs to be shared. Following are the steps to create new Note.

Explore > Note > New

Notes Details

Enter Title and Context.



Set Permissions to select Users

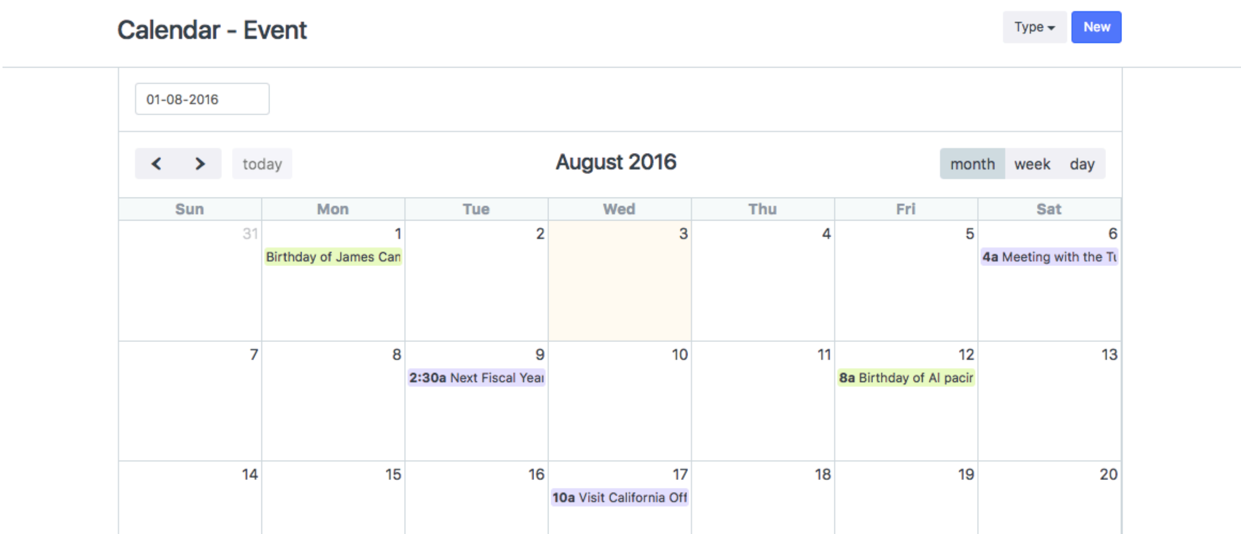
To make Note accessible for all, check "Public" under links section. Else you can share it with the specific User by using Share feature.

1.7 Topic: Calendar

1. Calendar

The Calendar is a tool where you can create and share Events and also see auto-generated events from the system.

You can switch calendar view based on Month, Week and Day.



Creating Events in Calendar

Creating Event Manually

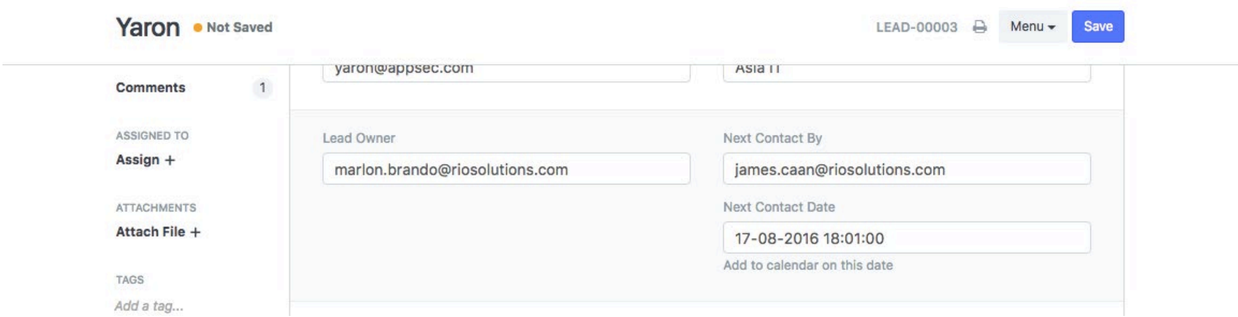
To create event manually, you should first determine Calendar View. If Event's start and end time will be within one day, then you should first switch to Day view.

This view will 24 hours of a day broken in various slots. You should click on slot for Event Start Time, and drag it down till you reach event end time.

Based on the selection of time slot, Start Time and End Time will be updated in the Event master. Then you can set subject for an event, and save it.

Event Based on Lead

In the Lead form, you will find a field called Next Contact by and Next Contact Date. Event will be auto created for date and person specified in this field.

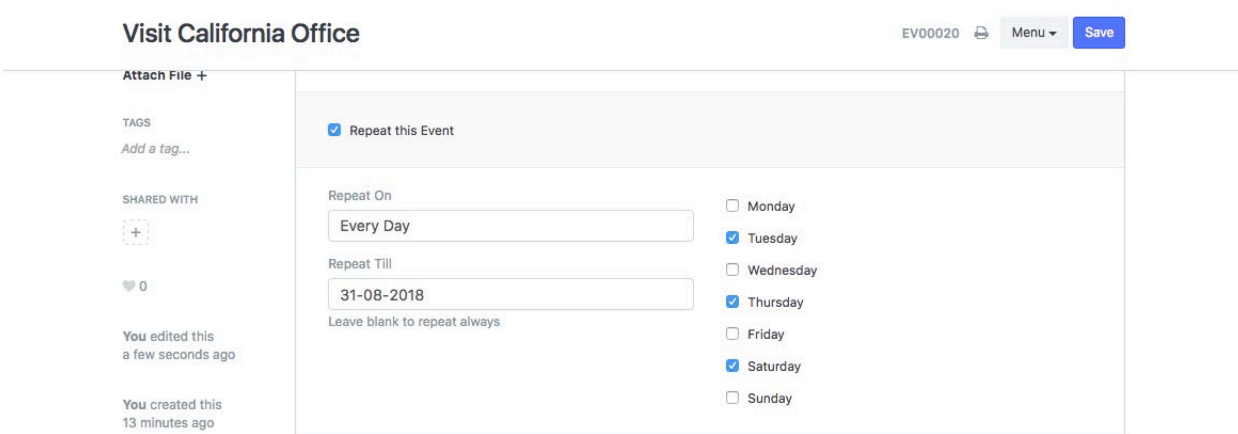


Birthday Event

Birthday Event is created based on Date of Birth specified in the Employee master.

Recurring Events

You can set events as recurring in specific interval by Checking the "Repeat This Event".

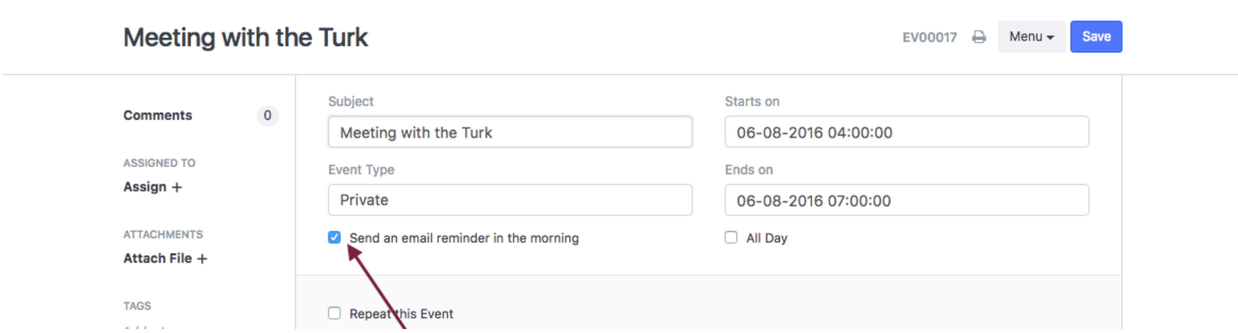


Event Reminders

There are two ways you can receive email reminder for an event.

Enable Reminder in Event

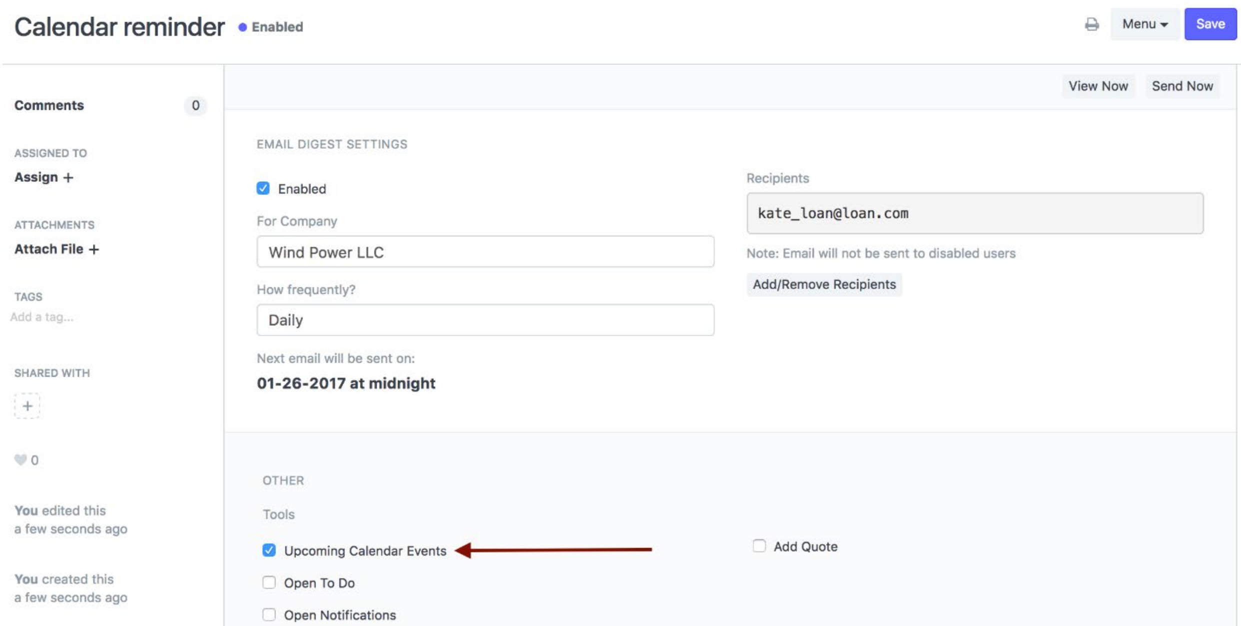
In the Event master, checking "Send an email reminder in the morning" will trigger notification email to all the participants for this event.



Create Email Digest

To get email reminders for event, you should set Email Digest for Calendar Events.

Email Digest can be set from: Setup > Email > Email Digest



1.8 Topic: Assignment

1. Assignment

Assign To feature in ERP+ allows you to allocate particular document to specific user, whom needs to further work on that document.

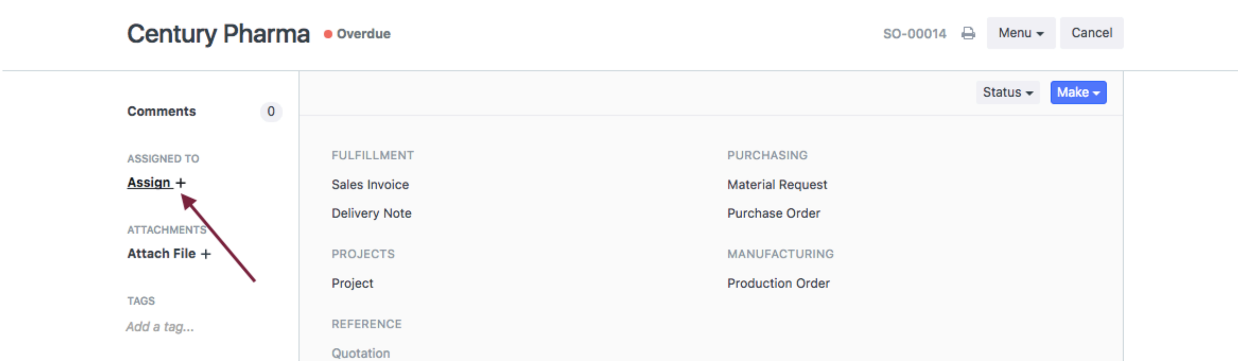
For example, if Sales Order needs to be approved/submitted by Sales Manager, first draft user can allocate that Sales Order to Sales Manager. On allocating document to Sales Manager, it will be added to that user's ToDo list. Same way, allocation can also be done to Material User and Account user who needs to create Delivery Note and Sales Invoice respectively against this Sales Note.

Permissions restriction cannot be done based on Assigned To.

Following are the steps to assign document to another user.

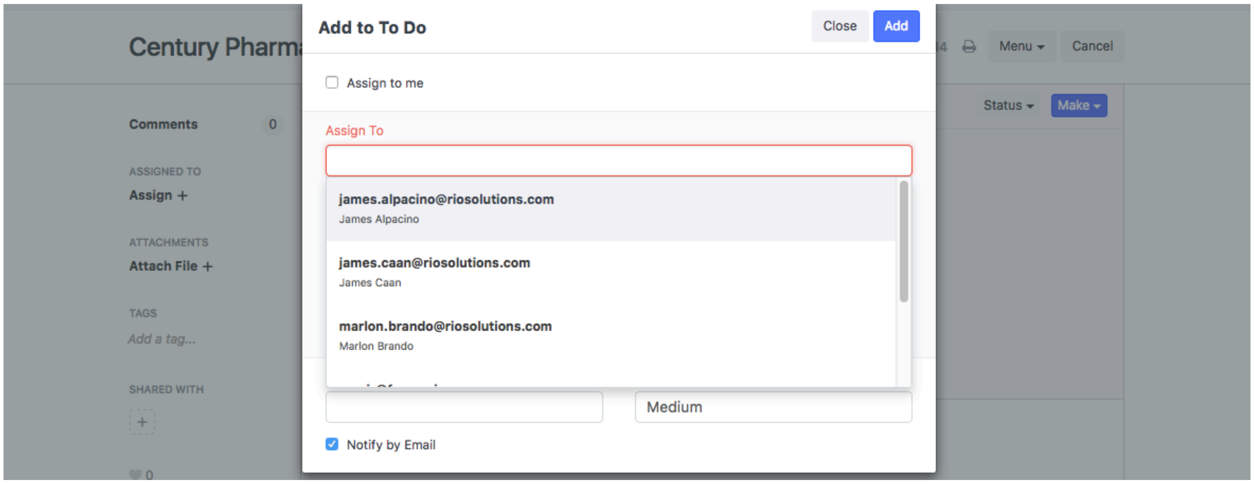
Step 1: Click on the Assign to Button

Assign to option is located at the footer of document. Clicking on Assignment Icon on the tool bar will fast-forward you to footer of same document.



Step 2: Assign to User

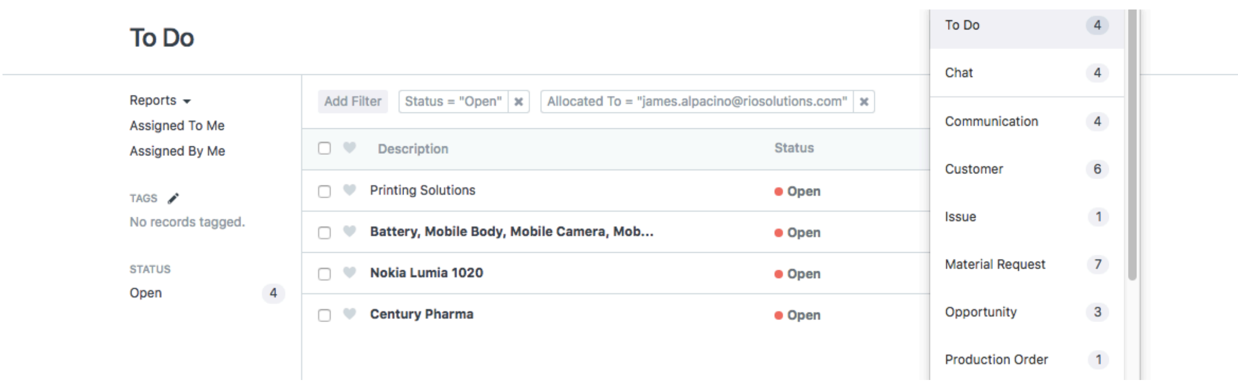
In the Assign To section, you will find option to select User to whom this document will be assigned to. You can assign one document to multiple people at a time.



With assignment, you can also leave a comment for the review of assignee.

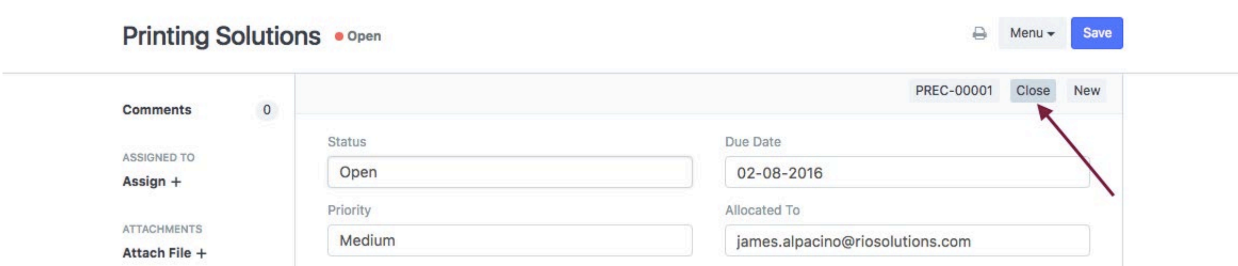
ToDo List of Assignee

This transaction will appear in the To-do list of the user in "Todo" section.



Removing Assignment

User will be able to remove assignment by clicking on "Assignment Completed" button in the document.

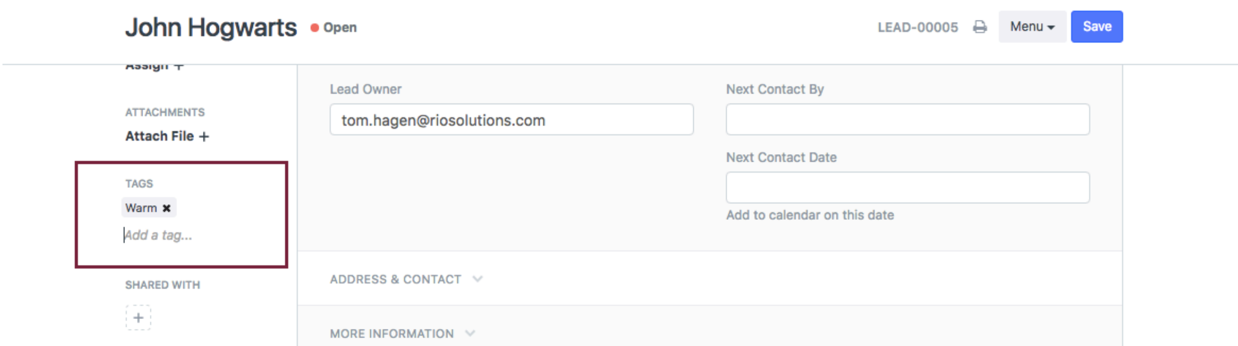


Once assignment is set as completed, the Status of its ToDo record will be set as Closed.

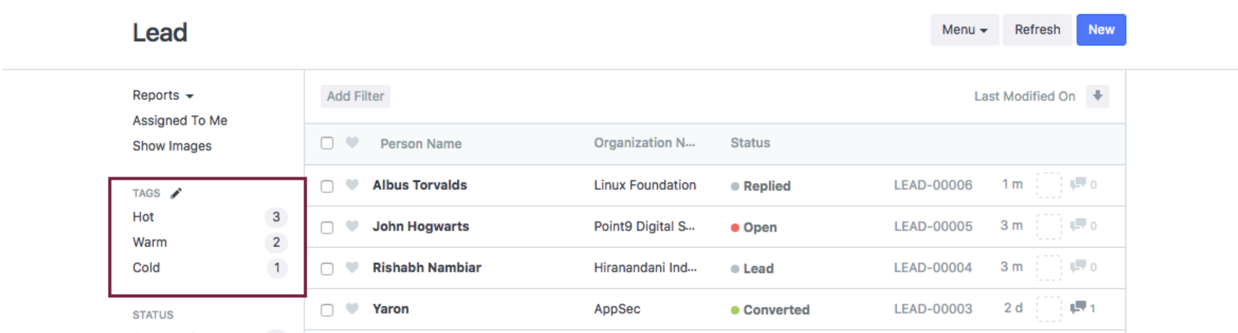
1.9 Topic: Tags

1. Tags

Like Assignments and Comments, you can also add your own tags to each type of transactions. These tags can help you search a document and also classify it.



ERP+ will also show you all the important tags in the document list.



2.1 Article: Check Link Between Docs

1. Checking Link Between Documents

Links option shows one document is linked to which other documents. Check Menu for the Links options.

Scenario

If you need that against Sales Order, which Delivery Note and Sales Invoice has been created, you should open Sales Order document, and check Links. Same way, you can also check Purchase Order, and find which Purchase Receipt and Purchase Invoice is linked with it.

How It Works?

When you check Links for a Sales Order, it lists all the record where this Sales Order ID is linked. When Delivery Note is created against Sales Order, then Sales Order link is updated in the Delivery Note Item table.

Backward Links

If I check Links in the Purchase Receipt, will it list Purchase Order from which this Purchase Receipt was created?

Links only shows forward linkages. For the backward links, you should check current document itself. In the Purchase Receipt Item table, you can check which Purchase Order it is linked to.

2.2 Article: Delete Submitted Document

1. Delete Submitted Document

To be able to delete Submitted document, you should first Cancel. Once canceled, you can delete that document from Menu or from the List View of that Document Type.

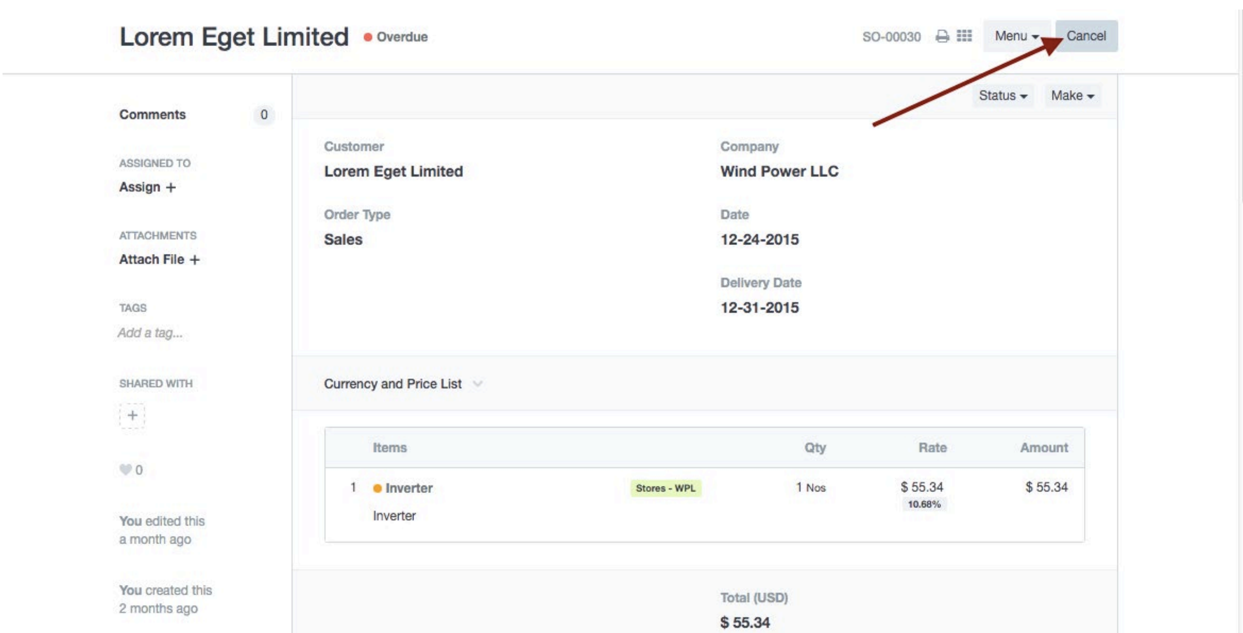
If document which needs to be deleted is also linked to other documents, then you should first Cancel document those document as well. For example, if you need to delete Sales Order, but Delivery Note and Sales Invoice has already been created against it. Then you should first cancel and delete documents in reverse order, i.e. Sales Invoice, Delivery Note and then Sales Order.

Delete option is only visible to user having related permission. From Role Permission Manager, you can control and define Delete permission and Role for each Document Type.

Following are step to delete submitted documents.

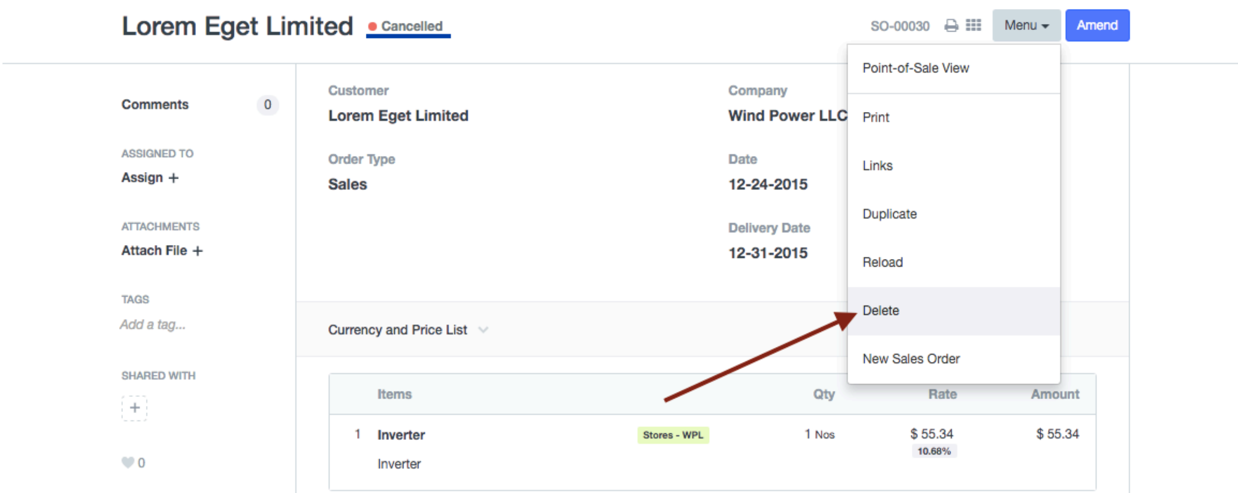
Step 1: Cancel Document

You will find option to Cancel in the submitted document. If document is at draft stage, it can delete directly. Also, if document is not submittable, but only save, it can be deleted directly.



Step 2: Delete Document

After cancellation, go to Menu and click on Delete.



Step 3: Deleting from List

For bulk deletion, you can select multiple Cancelled records and delete at once from the List View.

2.3 Article: Duplicate Record

1. Duplicate a Record

Duplicate feature helps you to copy values of existing document into new document.

Scenario

An electronic supplier receives a repeat order from an existing customer. Since new order will have details just like previous order, you should open previous order, and Duplicate it to create new order faster. On Duplicating, values of the previous transaction will be updated in a new document. You can make changes where needed and submit the document.

You will find Copy option under: Menu > Copy

2.4 Article: Adding File as an Attachment

1. Adding File as an Attachment

ERP+ allows to attach files with documents. User with a read permission on particular document will also be able to access files attached with it.

Attach New File

There are several ways to attach file to the document.

From Browser

By drag and drop

Click on Attach to browse and select the file.

Link

If you use separate server for files, or use online service like Dropbox, you can attach file by providing link of a particular file.

For hosted users, limit of 5 MB is applied on file size.

To ensure there are not many files attached to a document, which can affect your accounts performance, you can set limit as how many files can be attached to a particular document.

2.5 Article: Merging Documents

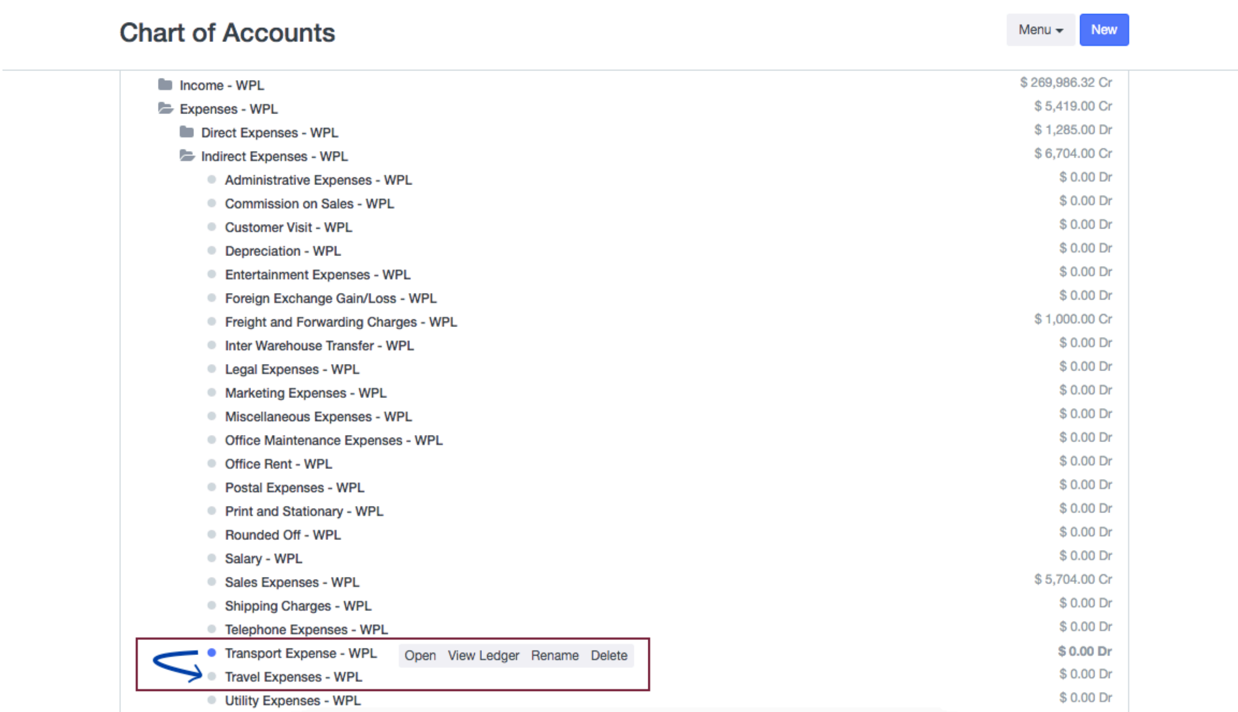
1. Merging Documents

For a document, if you have two records which are identical, and meant for common purpose, you can merge them into one record.

Following are step to merge documents. Let's assume we are merging two Accounts.

Step 1: Go to Chart of Account
Accounts > Documents > Chart of Accounts

Step 2: Go to Account
For an Account to be merged, click on the "Rename" option.

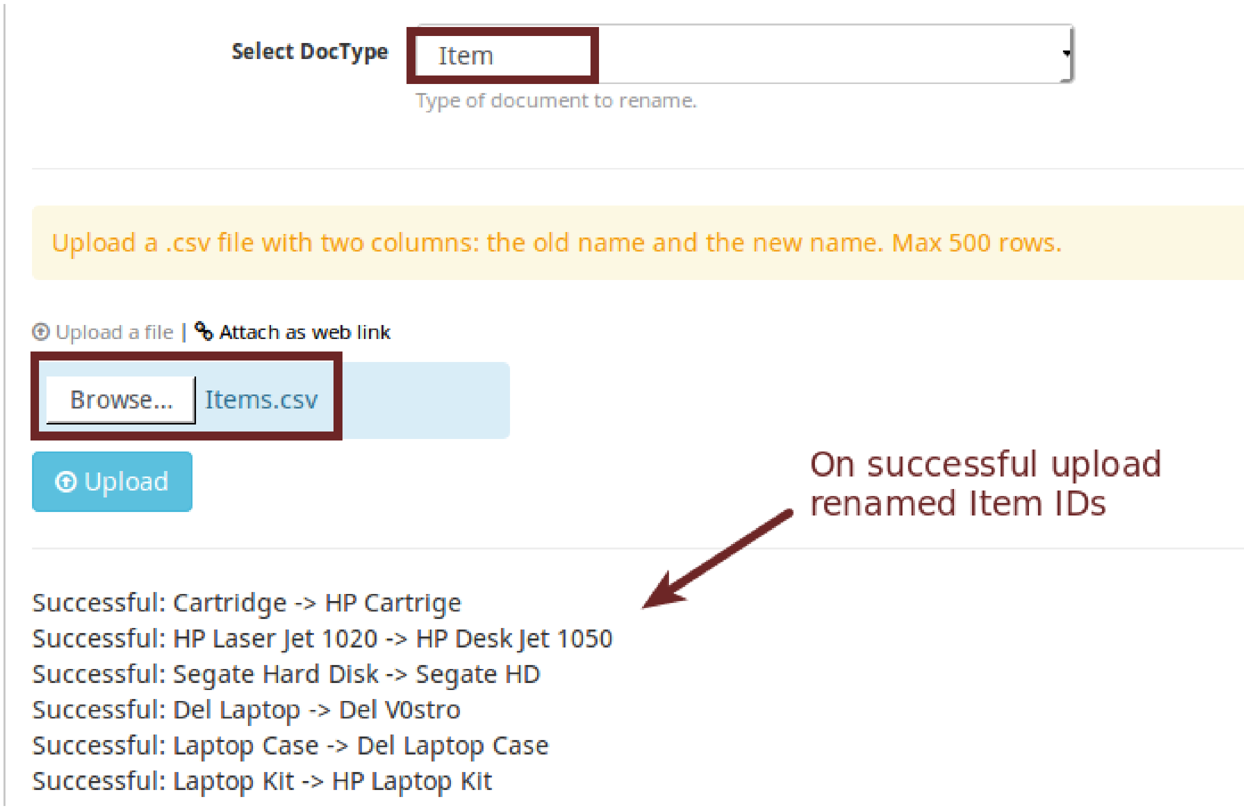


Step 3: Merge Account
In the New Name field, enter another account name with which this account will be merged. Check "Merge with existing" option. Then press 'Rename' button to merge.

Following is how the merged account will appear in the Chart of Accounts master.

Effect of Merging
After Account is merged, new name is updated in the existing transactions where old account was selected.

Note: Group Account cannot be merged into Child Account and vice versa.


Select DocType
Item
Type of document to rename.
Upload a .csv file with two columns: the old name and the new name. Max 500 rows.
Upload a file | Attach as web link
Browse... Items.csv
Upload
On successful upload renamed Item IDs
Successful: Cartridge -> HP Cartrige
Successful: HP Laser Jet 1020 -> HP Desk Jet 1050
Successful: Segate Hard Disk -> Segate HD
Successful: Del Laptop -> Del V0stro
Successful: Laptop Case -> Del Laptop Case
Successful: Laptop Kit -> HP Laptop Kit

2.6 Article: Bulk Rename

1. Bulk Rename

Using renaming tool, you can to rectify/change multiple document ids at once. This tool is only accessible to the User who has System Manager role assigned.

Rename Tool

You can rename ids of up to 500 records at a time. Following are step to bulk rename bulk records. Let's assume we are renaming Item Codes for the existing items.

Step 1: Open Excel File

In a spreadsheet file, enter old Item IDs in the first column, and new Item Ids in the second column. Save spreadsheet file in a CSV format.

Sheet 1

Table 1

	Old Name	New Name
1	PUFXPOLYXX	IT-PUFXPOLYXX
2	P55305002G	IT-P55305002G
3	FNKF0500XX	IT-FNKF0500XX
4	FNKF0500XX	IT-FNKF0500XX
5	FNKF0500XX	IT-FNKF0500XX
6	FNKF0500XX	IT-FNKF0500XX
7	PROFXGL25A	IT-PROFXGL25A
8	CORNERX25G	IT-CORNERX25G
9	G553050120	IT-G553050120
10	PUFXISOXXX	IT-PUFXISOXXX
11	HNDPC095X1	IT-HNDPC095X1
12	PORTGLSX25	IT-PORTGLSX25
13	ABROTAPE24	IT-ABROTAPE24

Step 2: Upload Data File

To upload data file, go to: Setup > Data > Rename Tool

Select DocType which you want to rename. Here DocType will be Item. Then Browse and Upload data file.

2.7 Article: Renaming a Document

1. Renaming a Document

Using Renaming feature, you can change ID of a master documents like Item, Warehouse, Accounts etc. Following are the steps to rename Item Code. Following same steps, you can rename other masters as well.

1. Go to Item
Stock > Documents > Item List > (Open Item to be renamed)

2. Rename

Effect of Renaming

Renaming document affects existing transaction where this record is selected. Consider given example, Item Code for a given item will be updated in the existing transaction as well.

2.8 Article: Search Filter

1. Search Filter

Search Filter option allow user to filter records based on value in the specific field of that document. Search Filters are available on the List View of Document Type and in the Report Builder.

Each filter option has three fields.

Field

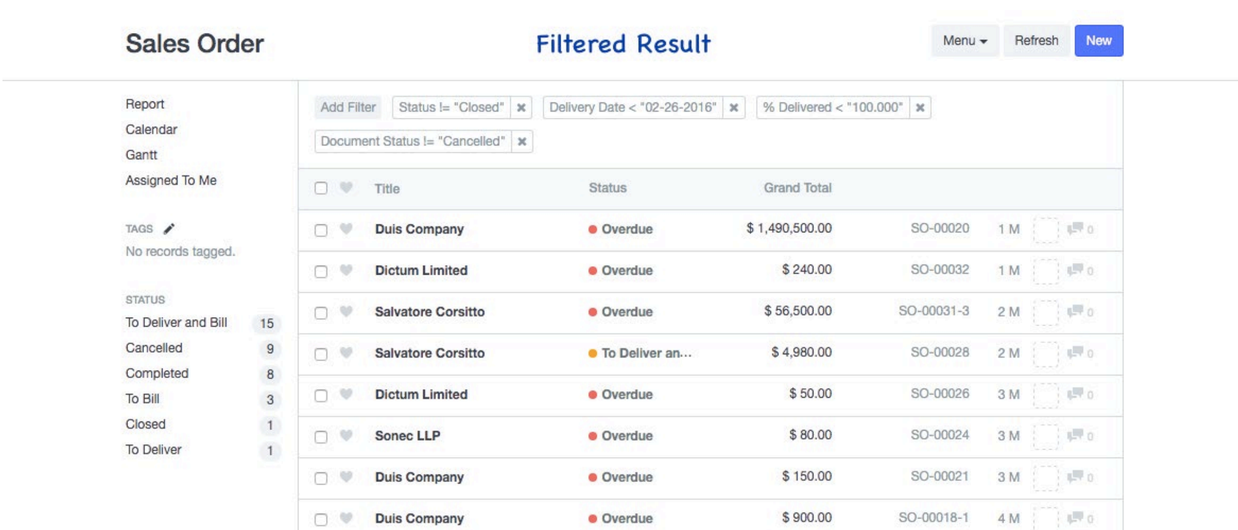
Select field of the document based on which you wish to filter records.

Based On

With Field, you will provide a value. In the based-on field, you can define a criterion that when filter should be applied in record. It will be when value define for the field if filter is:

Value

A value should be entered in this field based on while records will be filtered. After filter is applied, records will be filtered based on it. And filter will be shrunk under one field/button.



You can apply multiple filters at a time. To remove specific filter, just click on cancelled (X) sign ahead of it.

Ready Filters

From the list views, you can also apply filters by clicking on the Status field.

2.9 Article: Tree Master Renaming

1. Tree Master Renaming

There are various masters which are maintained in tree structure.

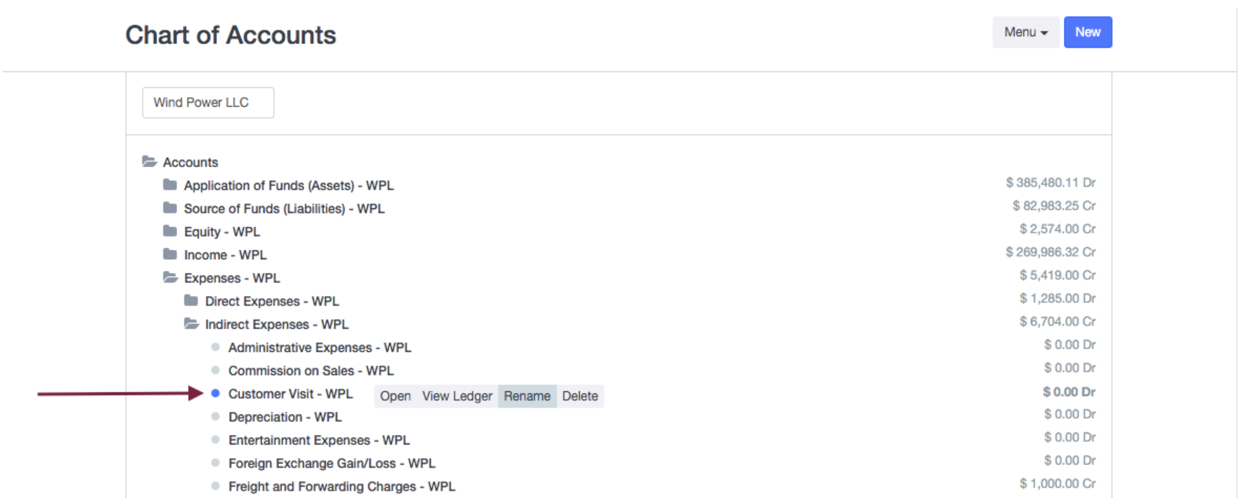
Following are the steps to be followed for renaming ID of a master which is maintained in tree structure. Let's rename an Account for the instance.

Step 1: Go to Chart of Account

Accounts > Setup > Chart of Accounts

Step 2: Go to Account

When click on the Account, you will find Rename option.



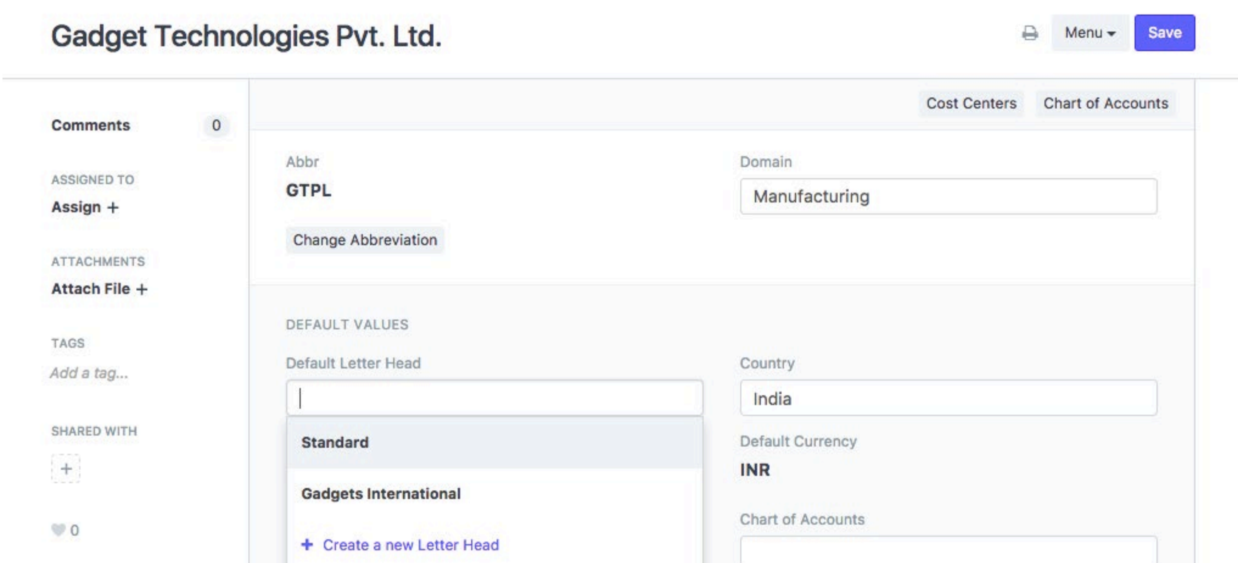
Step 2: Rename Account

On clicking Rename, you will get field to enter New Name. After entering new name for the Account, click on the "Rename" button.

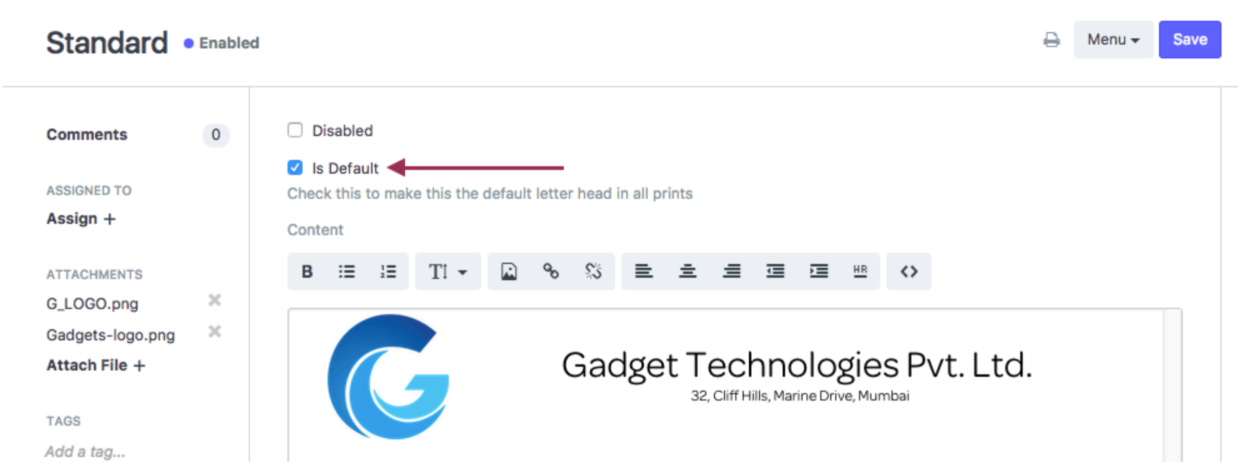
2.10 Article: Letter Head in the Report

1. Letter Head in the Report's Print Format

In the reports, Letter Head is fetched from the Company master. To have company's Letter Head fetched correctly in the report, please ensure that you have updated default Letter Head in the Company master. Explore > Accounts > Company



In a Company master, if no Letter Head is set as default, then in the reports, Letter Head having Default field checked will be fetched.



If you are managing multiple companies in a single ERP+ account, then ensure that for each Company, default Letter Head is set in the Company master.

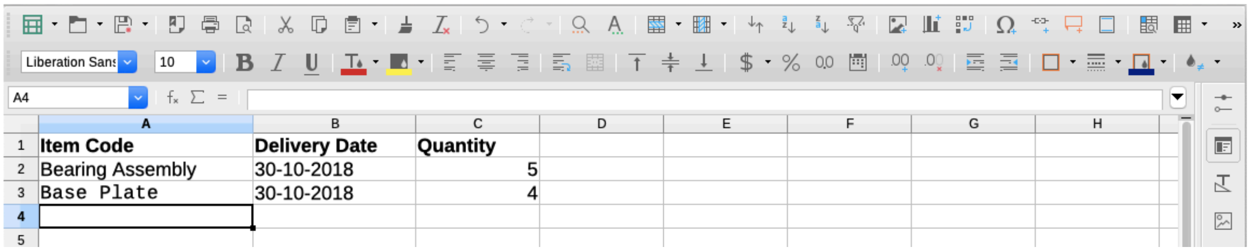
After updating Letter Head in the Company master, refresh your ERP+ account, and then check the print format of a report.

2.11 Article: Copy Paste Records from Excel

1. Copy Pasting Multiple Records from Excel

It is possible to copy and paste multi records into child table field in the form by simply follow the steps below:

a. Prepare the source data in Excel or text editor with each column separated by tab.

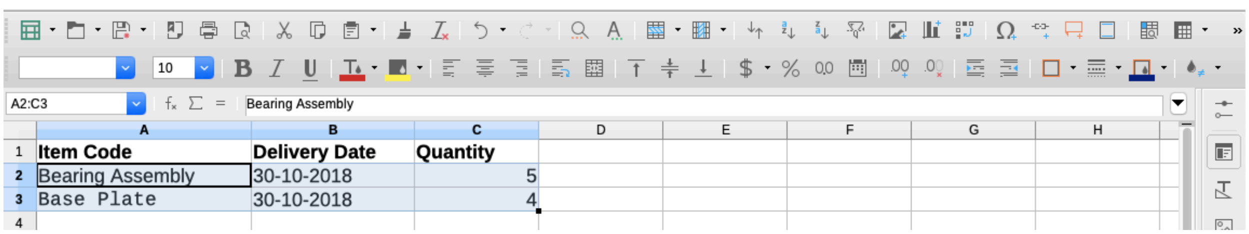


	A	B	C	D	E	F	G	H
1	Item Code	Delivery Date	Quantity					
2	Bearing Assembly	30-10-2018	5					
3	Base Plate	30-10-2018	4					
4								
5								

b. Drag to select the records, and click the copy menu button or by Ctrl + C (Cmd + C) for

Case 1. First line as column header, both field name and label supported, hidden columns can be copied

Case 2. No column header, the data will directly map to the visible columns



	A	B	C	D	E	F	G	H
1	Item Code	Delivery Date	Quantity					
2	Bearing Assembly	30-10-2018	5					
3	Base Plate	30-10-2018	4					
4								

c. Place the cursor to the target input field of the child table, paste it by Ctrl + V. Unlike the import via upload file feature which also can batch input the child table, this copy & paste feature will trigger field change event automatically. In other word if only item_code is pasted, the item price, qty and other item code related fields will be auto populated just like user manually input item code and press ENTER. on the other hand, for performance consideration, less than 100 records per paste is allowed.

2.12 Article: Global Search

1. Global Search

Global search is a word-processing operation in which a complete computer file or set of files is searched for every occurrence of a particular word or other sequence of characters.

We have made the Awesome Bar of ERP+ lot more powerful by adding Global Search feature. Global Search helps users find information quickly. It’s located in the upper right-hand corner in ERP+. Simply entering a few characters in the Search will show results from several different record types (Contact, Customer, Issues etc.) related to that keyword. You can also customize the fields based on which search will be shown.

multi search term/keywords separated by & operator is supported, refer to the following use cases:

- Input "apple & ipod" can return docs with one field contain Apple and the other contains iPpod(PO's vendor and item).
- Input "iphone & ipod" can return target docs which contain both item iPhone and iPod (child table items).
- Input "iphone & black" can return item with description contains both iPhone and black(long text field).
- Input 'foo & bar" can return any docs with both tags foo and bar assigned. (special long text field _usertags).

Using Awesome Bar for Global Search.

Enable Global Search for fields in a Doctype.

2.13 Article: Adding Attachments to Out Messages

1. Adding Attachments to Outgoing Messages

ERP+ has in-built file manager.

If you have file attached to the document (say Purchase Order), and same file needs to be emailed as attachment, following is how you can achieve it.