



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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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.

The screenshot shows the 'To Do' dashboard. On the left, there are filters for 'Reports' (Assigned To Me, Assigned By Me), 'TAGS' (No records tagged), and 'STATUS' (Open, with a count of 4). The main area displays a table of tasks with columns for 'Description' and 'Status'. The tasks listed are: Printing Solutions, Battery, Mobile Body, Mobile Camera, Mob..., Nokia Lumia 1020, and Century Pharma, all with a status of 'Open'. On the right, a vertical sidebar shows a list of categories with their respective counts: To Do (4), Chat (4), Communication (4), Customer (6), Issue (1), Material Request (7), Opportunity (3), and Production Order (1).

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.

The screenshot shows the details for the 'Printing Solutions' task, which is currently 'Open'. The task ID is 'PREC-00001'. On the left, there are sections for 'Comments' (0), 'ASSIGNED TO' (Assign +), and 'ATTACHMENTS' (Attach File +). The main form contains fields for 'Status' (Open), 'Due Date' (02-08-2016), 'Priority' (Medium), and 'Allocated To' (james.alpacino@riosolutions.com). A red arrow points to the 'Close' button next to the task ID, indicating the action to be taken to complete the task.

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.

Delivery Note 1 item selected Menu Refresh Delete

Reports ▾
List
Kanban ▾
Assigned To Me

Show Filters Against Sales Order = "SO-00016" ✕ + Last Modified On ▾

<input type="checkbox"/>	♥ Title	Status	Grand Total	% Installed		
<input checked="" type="checkbox"/>	♥ Latte Solutions	● Draft	₹ 800.00	0%	DN-00007	2 m 0

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.

Sony Headphone 9dd041972e Menu

Comments 0

ASSIGNED TO

Deleted Name Restored


Sony Headphone

Restore

Step 3: Restored

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

Sony Headphone ● Enabled Menu Save



Comments 0

View Duplicate



This is based on stock movement. See Stock Ledger for details

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 trail 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.

Customize Form
Update

Enter Form Type

Title Field

Use this fieldname to generate title

Change Label (via Custom Translation)

Image Field

Must be of type "Attach Image"

Default Print Format

Search Fields

Fields separated by comma (,) will be included in the "Search By" list of Search dialog box

Max Attachments

Hide Copy
 Is Table
 Quick Entry
 Track Changes

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.

Add a comment
Comment

Ctrl+Enter to add comment

New Email

 **You changed values for Rate from \$ 31.08 to \$ 30.00 in row #1, Amount from \$ 310.80 to \$ 300.00 in row #1, Rate (Company Currency) from ₹ 2,000.31 to ₹ 1,930.80 in row #1** – a few seconds ago



 **You changed value of Total (Company Currency) from ₹ 61,685.85 to ₹ 60,990.76, Net Total (Company Currency) from ₹ 61,685.85 to ₹ 60,990.76, Total from \$ 958.45 to \$ 947.65** – a few seconds ago

Version Details

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

PO-00016

Menu ▾

<p>ASSIGNED TO Assign +</p> <p>ATTACHMENTS Attach File +</p> <p>TAGS Add a tag...</p> <p>SHARED WITH </p> <p> 0</p> <p>You edited this a few seconds ago</p> <p>You created this a few seconds ago</p> <p>19.27MB (0%) used</p>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; border-bottom: 1px solid #ccc;">DocType</td> <td style="width: 35%; border-bottom: 1px solid #ccc;">Purchase Order</td> <td style="width: 35%; border-bottom: 1px solid #ccc;">Document Name</td> <td style="border-bottom: 1px solid #ccc;">PO-00016</td> </tr> <tr> <td colspan="4" style="padding: 10px 0;">Values Changed</td> </tr> <tr> <td style="border: 1px solid #ccc;">Property</td> <td style="border: 1px solid #ccc;">Original Value</td> <td style="border: 1px solid #ccc;">New Value</td> <td></td> </tr> <tr> <td style="border: 1px solid #ccc;">Total (Company Currency)</td> <td style="border: 1px solid #ccc;">₹ 61,685.85</td> <td style="border: 1px solid #ccc;">₹ 60,990.76</td> <td></td> </tr> <tr> <td style="border: 1px solid #ccc;">Net Total (Company Currency)</td> <td style="border: 1px solid #ccc;">₹ 61,685.85</td> <td style="border: 1px solid #ccc;">₹ 60,990.76</td> <td></td> </tr> <tr> <td style="border: 1px solid #ccc;">Total</td> <td style="border: 1px solid #ccc;">\$ 958.45</td> <td style="border: 1px solid #ccc;">\$ 947.65</td> <td></td> </tr> <tr> <td style="border: 1px solid #ccc;">Net Total</td> <td style="border: 1px solid #ccc;">\$ 958.45</td> <td style="border: 1px solid #ccc;">\$ 947.65</td> <td></td> </tr> <tr> <td style="border: 1px solid #ccc;">Grand Total (Company Currency)</td> <td style="border: 1px solid #ccc;">₹ 61,685.85</td> <td style="border: 1px solid #ccc;">₹ 60,990.76</td> <td></td> </tr> <tr> <td style="border: 1px solid #ccc;">In Words (Company Currency)</td> <td style="border: 1px solid #ccc;">INR Sixty One Thousand, Six Hundred And Eighty Five and Eighty Five Paise only.</td> <td style="border: 1px solid #ccc;">INR Sixty Thousand, Nine Hundred And Ninety and Seventy Six Paise only.</td> <td></td> </tr> <tr> <td style="border: 1px solid #ccc;">Rounded Total (Company Currency)</td> <td style="border: 1px solid #ccc;">₹ 61,686.00</td> <td style="border: 1px solid #ccc;">₹ 60,991.00</td> <td></td> </tr> </table>	DocType	Purchase Order	Document Name	PO-00016	Values Changed				Property	Original Value	New Value		Total (Company Currency)	₹ 61,685.85	₹ 60,990.76		Net Total (Company Currency)	₹ 61,685.85	₹ 60,990.76		Total	\$ 958.45	\$ 947.65		Net Total	\$ 958.45	\$ 947.65		Grand Total (Company Currency)	₹ 61,685.85	₹ 60,990.76		In Words (Company Currency)	INR Sixty One Thousand, Six Hundred And Eighty Five and Eighty Five Paise only.	INR Sixty Thousand, Nine Hundred And Ninety and Seventy Six Paise only.		Rounded Total (Company Currency)	₹ 61,686.00	₹ 60,991.00	
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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.

Saxena Chemicals • Quotation OPTY-00005 Menu Save

Add a comment Comment

Offer sent.

New Email

Tom Hagen Added Offer.docx - a few seconds ago

Marlon Brando - 4 minutes ago 0
I will make an offer they can't refuse!

James Alpacino - 6 minutes ago 0
We need to make an offer.

Administrator Quotation - 23 days ago

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.

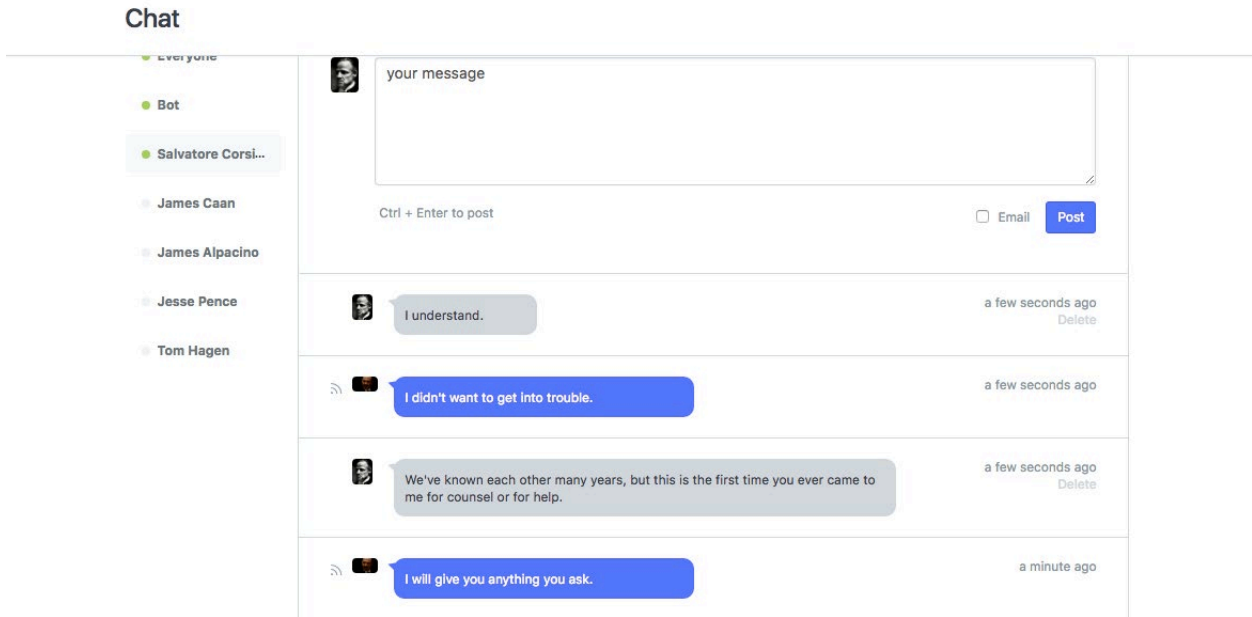
1.5 Topic: Chat

1. Chat

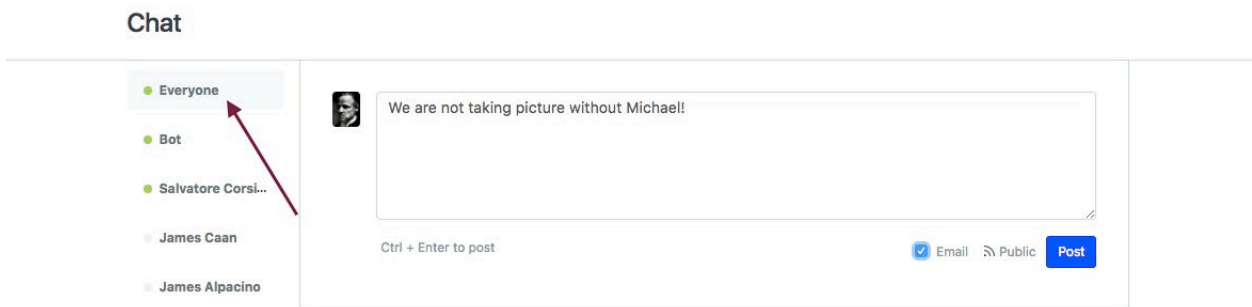
You can send and receive messages from the system by using the Messages tool.

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

1.7 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.

Calendar - Event Type ▾ New

01-08-2016

< > today August 2016 month week day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1 Birthday of James Can	2	3	4	5	6 4a Meeting with the Ti
7	8	9 2:30a Next Fiscal Year	10	11	12 8a Birthday of Al pacir	13
14	15	16	17 10a Visit California Off	18	19	20

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.

Yaron ● Not Saved LEAD-00003 Menu Save

Comments 1

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag...

Lead Owner:

Next Contact By:

Next Contact Date:

Add to calendar on this date

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".

Visit California Office EV00020 Menu Save

Attach File +

TAGS
Add a tag...

SHARED WITH

0

You edited this a few seconds ago

You created this 13 minutes ago

Repeat this Event

Repeat On: Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Repeat Till: Leave blank to repeat always

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.

Meeting with the Turk EV00017 Menu Save

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
...

Subject:

Starts on:

Event Type:

Ends on:

Send an email reminder in the morning All Day

Repeat 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

Calendar reminder Enabled Menu Save

View Now Send Now

Comments 0

ASSIGNED TO
Assign +

ATTACHMENTS
Attach File +

TAGS
Add a tag...

SHARED WITH
+

0

You edited this a few seconds ago

You created this a few seconds ago

EMAIL DIGEST SETTINGS

Enabled

For Company

How frequently?

Next email will be sent on:
01-26-2017 at midnight

Recipients

Note: Email will not be sent to disabled users
[Add/Remove Recipients](#)

OTHER

Tools

Upcoming Calendar Events ←

Open To Do

Open Notifications

Add Quote

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.

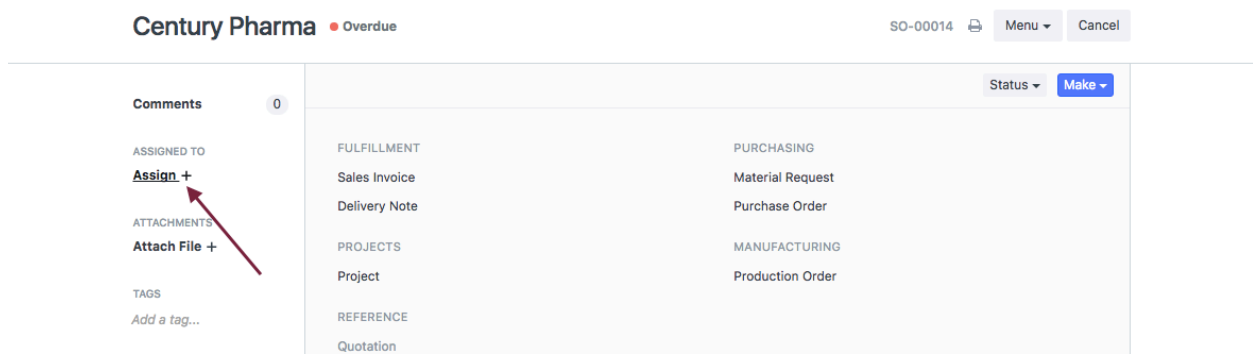
For example, if Sales Order needs to be approved/submitted by Sales Manager, first draft user can allocate that Sales Order to Sales Manager. On allocating document to Sales Manager, it will be added to that user's ToDo list. Same way, allocation can also be done to Material User and Account user who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

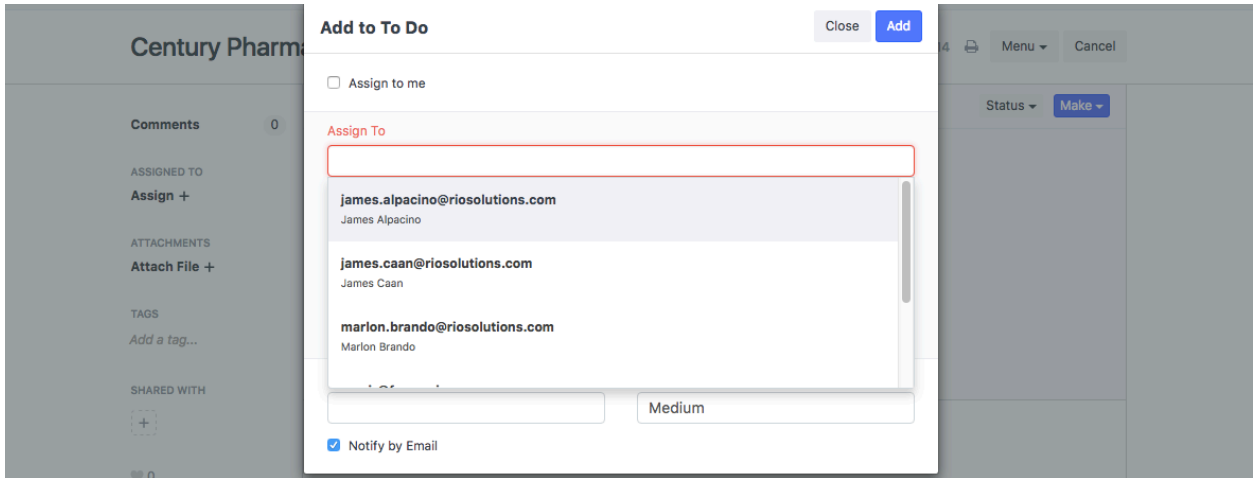
Assign to option is located at the footer of document. Clicking on Assignment Icon on the tool bar will fast-forward you to footer of same document.



The screenshot displays the ERP+ interface for a document titled "Century Pharma" with a red "Overdue" indicator. The document ID is "SO-00014". The interface includes a "Menu" dropdown and a "Cancel" button. On the left, there is a sidebar with sections: "Comments" (0), "ASSIGNED TO" (containing the "Assign +" button highlighted by a red arrow), "ATTACHMENTS" (containing "Attach File +"), and "TAGS" (containing "Add a tag..."). The main content area is divided into two columns: "FULFILLMENT" (Sales Invoice, Delivery Note) and "PURCHASING" (Material Request, Purchase Order). Below these are sections for "PROJECTS" (Project), "REFERENCE" (Quotation), and "MANUFACTURING" (Production Order). At the top right of the main content area, there are "Status" and "Make" dropdown menus.

Step 2: Assign to User

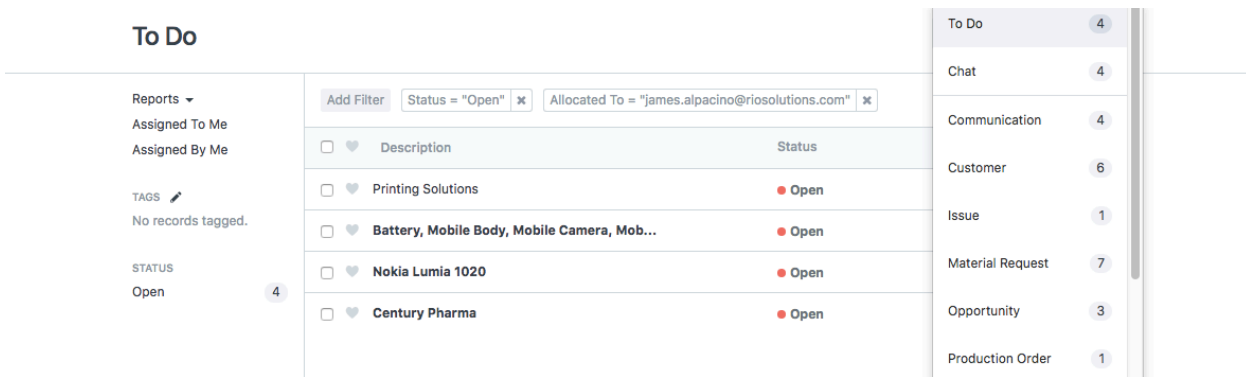
In the Assign To section, you will find option to select User to whom this document will be assigned to. You can assign one document to multiple people at a time.



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

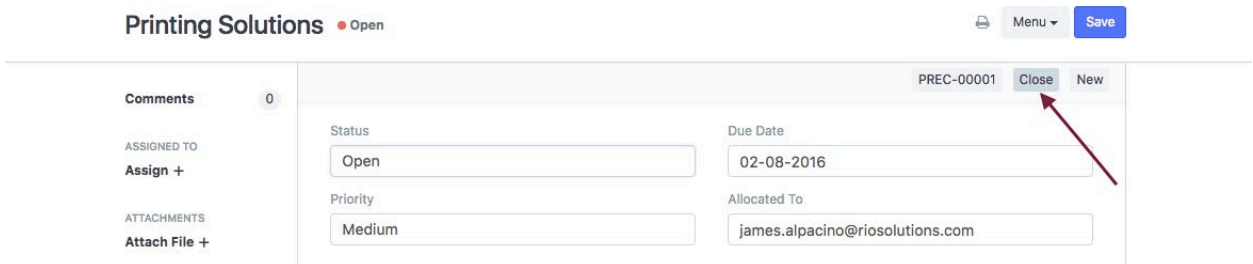
ToDo List of Assignee

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.

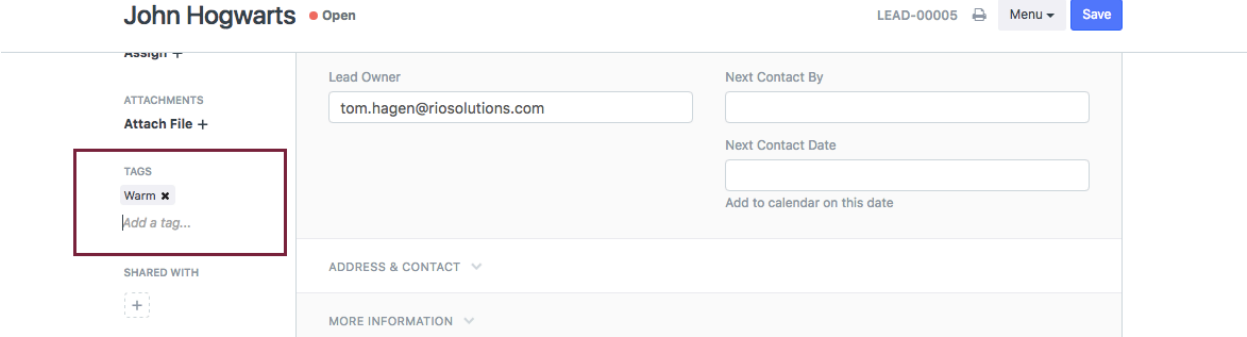


Once assignment is set as completed, the Status of its ToDo record will be set as Closed.

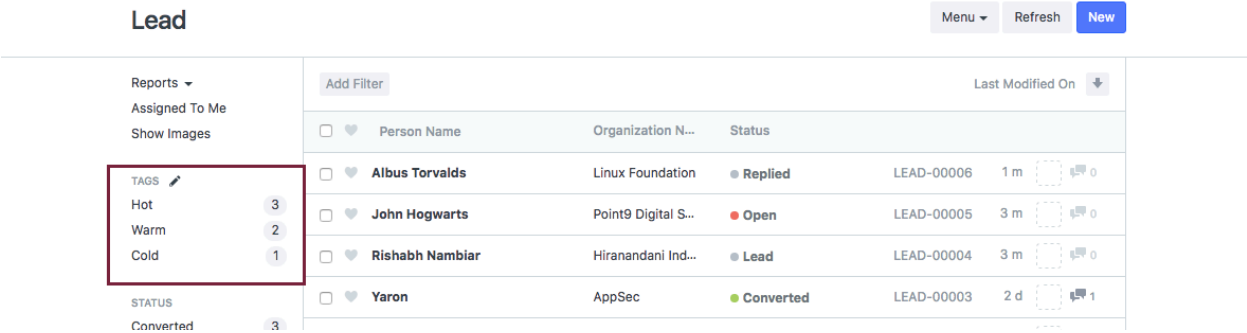
1.9 Topic: **Tags**

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.

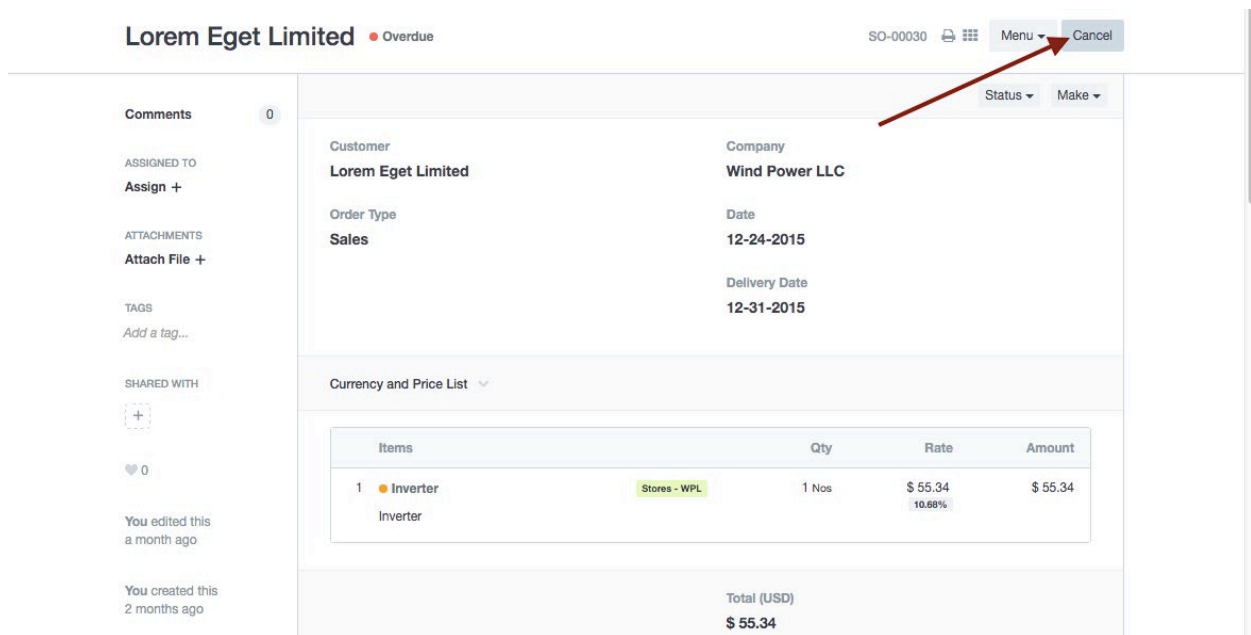
If document which needs to be deleted is also linked to other documents, then you should first Cancel document those document as well. For example, if you need to delete Sales Order, but Delivery Note and Sales Invoice has already been created against it. Then you should first cancel and delete documents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



The screenshot shows a document interface for 'Lorem Eget Limited' with a status of 'Overdue'. The document ID is 'SO-00030'. A red arrow points to the 'Cancel' button in the top right corner, which is part of a 'Menu' dropdown. The document details include:

- Customer: Lorem Eget Limited
- Company: Wind Power LLC
- Order Type: Sales
- Date: 12-24-2015
- Delivery Date: 12-31-2015

The 'Currency and Price List' section is expanded, showing a table with one item:

Items	Qty	Rate	Amount
1 Inverter Inverter	1 Nos	\$ 55.34 10.88%	\$ 55.34

The total amount is \$ 55.34 (USD).

Step 2: Delete Document

After cancellation, go to Menu and click on Delete.

Screenshot of the ERP+ interface showing a sales order for 'Lorem Eget Limited' (Cancelled). The order details include Customer: Lorem Eget Limited, Company: Wind Power LLC, Date: 12-24-2015, and Delivery Date: 12-31-2015. A dropdown menu is open over the 'Delete' option, with a red arrow pointing to it. The menu options are: Point-of-Sale View, Print, Links, Duplicate, Reload, Delete, and New Sales Order.

Items	Qty	Rate	Amount
1 Inverter Inverter	1 Nos	\$ 55.34 10.68%	\$ 55.34

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.

Chart of Accounts		Menu ▾	New
Income - WPL		\$ 269,986.32	Cr
Expenses - WPL		\$ 5,419.00	Cr
Direct Expenses - WPL		\$ 1,285.00	Dr
Indirect Expenses - WPL		\$ 6,704.00	Cr
Administrative Expenses - WPL		\$ 0.00	Dr
Commission on Sales - WPL		\$ 0.00	Dr
Customer Visit - WPL		\$ 0.00	Dr
Depreciation - WPL		\$ 0.00	Dr
Entertainment Expenses - WPL		\$ 0.00	Dr
Foreign Exchange Gain/Loss - WPL		\$ 0.00	Dr
Freight and Forwarding Charges - WPL		\$ 1,000.00	Cr
Inter Warehouse Transfer - WPL		\$ 0.00	Dr
Legal Expenses - WPL		\$ 0.00	Dr
Marketing Expenses - WPL		\$ 0.00	Dr
Miscellaneous Expenses - WPL		\$ 0.00	Dr
Office Maintenance Expenses - WPL		\$ 0.00	Dr
Office Rent - WPL		\$ 0.00	Dr
Postal Expenses - WPL		\$ 0.00	Dr
Print and Stationary - WPL		\$ 0.00	Dr
Rounded Off - WPL		\$ 0.00	Dr
Salary - WPL		\$ 0.00	Dr
Sales Expenses - WPL		\$ 5,704.00	Cr
Shipping Charges - WPL		\$ 0.00	Dr
Telephone Expenses - WPL		\$ 0.00	Dr
Transport Expense - WPL	Open View Ledger Rename Delete	\$ 0.00	Dr
Travel Expenses - WPL		\$ 0.00	Dr
Utility Expenses - WPL		\$ 0.00	Dr

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

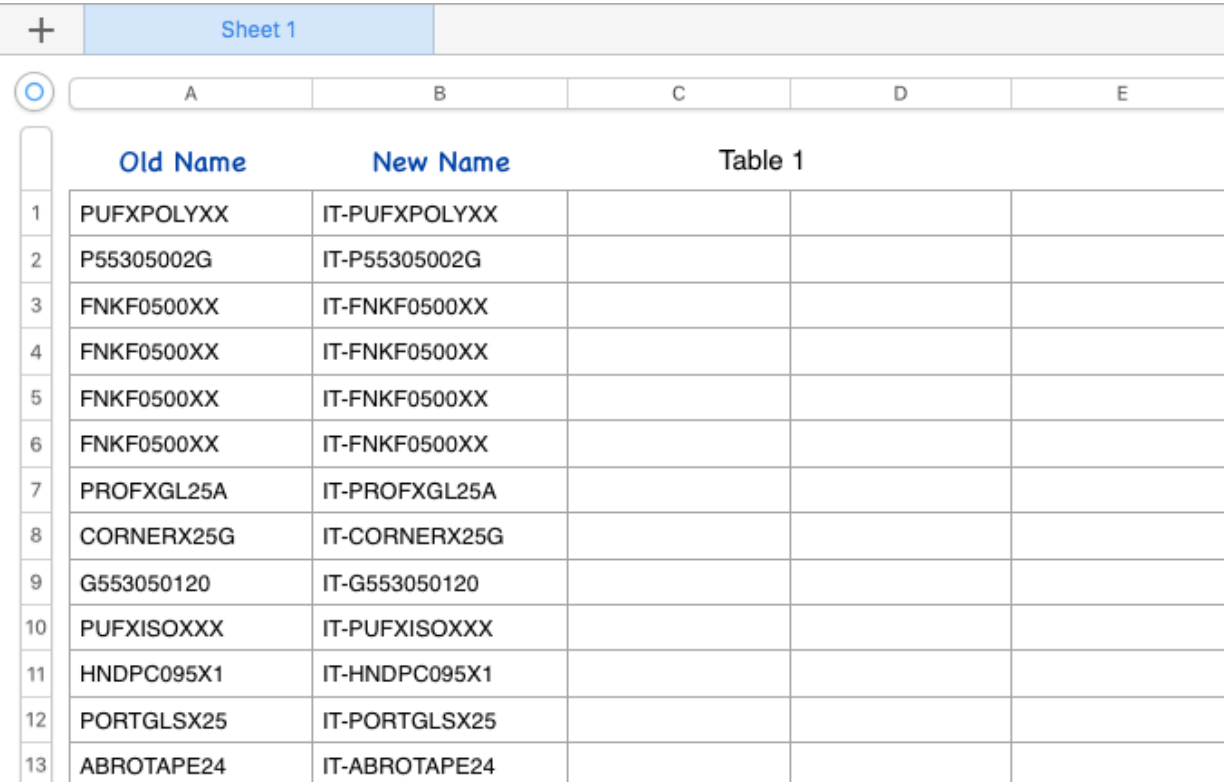
Using renaming tool, you can to rectify/change multiple document ids at once. This tool is only accessible to the User who has System Manager role assigned.

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.



The screenshot shows an Excel spreadsheet with a table containing 13 rows of data. The columns are labeled 'Old Name' and 'New Name'. The 'New Name' column contains 'IT-' followed by the 'Old Name' value. The table is titled '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.

Sales Order Filtered Result Menu Refresh New

Report
Calendar
Gantt
Assigned To Me

TAGS
No records tagged.

STATUS
To Deliver and Bill 15
Cancelled 9
Completed 8
To Bill 3
Closed 1
To Deliver 1

Add Filter Status != "Closed" x Delivery Date < "02-26-2016" x % Delivered < "100.000" x Document Status != "Cancelled" x

<input type="checkbox"/>	<input type="checkbox"/>	Title	Status	Grand Total			
<input type="checkbox"/>	<input type="checkbox"/>	Duis Company	Overdue	\$ 1,490,500.00	SO-00020	1 M	
<input type="checkbox"/>	<input type="checkbox"/>	Dictum Limited	Overdue	\$ 240.00	SO-00032	1 M	
<input type="checkbox"/>	<input type="checkbox"/>	Salvatore Corsitto	Overdue	\$ 56,500.00	SO-00031-3	2 M	
<input type="checkbox"/>	<input type="checkbox"/>	Salvatore Corsitto	To Deliver an...	\$ 4,980.00	SO-00028	2 M	
<input type="checkbox"/>	<input type="checkbox"/>	Dictum Limited	Overdue	\$ 50.00	SO-00026	3 M	
<input type="checkbox"/>	<input type="checkbox"/>	Sonec LLP	Overdue	\$ 80.00	SO-00024	3 M	
<input type="checkbox"/>	<input type="checkbox"/>	Duis Company	Overdue	\$ 150.00	SO-00021	3 M	
<input type="checkbox"/>	<input type="checkbox"/>	Duis Company	Overdue	\$ 900.00	SO-00018-1	4 M	

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.

The screenshot displays the 'Chart of Accounts' for 'Wind Power LLC'. The interface includes a 'Menu' dropdown and a 'New' button. The account tree is as follows:

- Accounts
 - Application of Funds (Assets) - WPL \$ 385,480.11 Dr
 - Source of Funds (Liabilities) - WPL \$ 82,983.25 Cr
 - Equity - WPL \$ 2,574.00 Cr
 - Income - WPL \$ 269,986.32 Cr
 - Expenses - WPL \$ 5,419.00 Cr
 - Direct Expenses - WPL \$ 1,285.00 Dr
 - Indirect Expenses - WPL \$ 6,704.00 Cr
 - Administrative Expenses - WPL \$ 0.00 Dr
 - Commission on Sales - WPL \$ 0.00 Dr
 - Customer Visit - WPL \$ 0.00 Dr** (Selected, with context menu: Open, View Ledger, Rename, Delete)
 - Depreciation - WPL \$ 0.00 Dr
 - Entertainment Expenses - WPL \$ 0.00 Dr
 - Foreign Exchange Gain/Loss - WPL \$ 0.00 Dr
 - Freight and Forwarding Charges - WPL \$ 1,000.00 Cr

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

Gadget Technologies Pvt. Ltd. Menu Save

Cost Centers | Chart of Accounts

Abbr: **GTPL** Change Abbreviation

Domain: Manufacturing

DEFAULT VALUES

Default Letter Head: **Standard** (Selected)

Country: India

Default Currency: **INR**

Chart of Accounts: [Empty field]

+ Create a new Letter Head

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.

Standard • Enabled Menu Save


Disabled

Is Default ←

Check this to make this the default letter head in all prints

Content

B [List icons] [Text icon] [Image icon] [Link icon] [Unlink icon] [Align left] [Align center] [Align right] [Justify] [HR] [Undo/Redo]

 **Gadget Technologies Pvt. Ltd.**
32, Cliff Hills, Marine Drive, Mumbai

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.