

ERP Fundamentals User Guide

Getting Started

1 INTRODUCTION

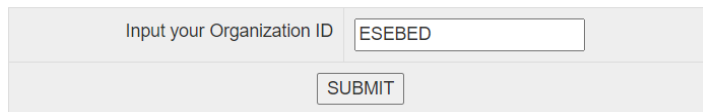
Recollect that when you created your ERP Fundamentals database, you received a message that looked like this:-

Welcome to ERP Fundamentals !
You are the ADMINISTRATOR of your organization, Pristine Products Pvt. Ltd., whose unique Organization ID is **ESEBED**
In order to access the Main Menu, visit <https://erpfundamentals2.appspot.com>, and input your Organization ID.

Figure 1

You also received your default Administrator password in your email.

Accordingly, visit <https://erpfundamentals2.appspot.com>, whereupon you will see the following screen:-



The screenshot shows a light gray rectangular form. At the top, it says "Input your Organization ID" followed by a text input field containing the text "ESEBED". Below this, centered, is a button labeled "SUBMIT".

Figure 2

Now input your Organization ID, let us say ESEBED, and click **SUBMIT**. You will now see the **Main Menu** of *ERP Fundamentals*:-

Empowering Vision, Driving Growth: Fueling Success with Pristine
Products Pvt. Ltd.



The screenshot shows three light gray buttons stacked vertically. The top button is labeled "ADMINISTRATOR", the middle button is labeled "EMPLOYEES", and the bottom button is labeled "CUSTOMERS". All labels are in blue capital letters.

Figure 3

You, being the Administrator, should now click **ADMINISTRATOR**, whereupon you will see the following login screen:-

Input your Password	<input type="password"/>
<input type="button" value="SUBMIT"/>	

[Know your password / Change password ?](#)

Figure 4

Now input your password and click **SUBMIT**.

If you do not remember your password, click *Know your password / Change password ?* in the login screen (Figure 4), whereupon you will see the following forms:-

Want to change your password ?

Email ID:	<input type="text"/>
Password:	<input type="password"/>
<input type="button" value="SUBMIT"/>	

Want to know your password ?
(Your current password will be emailed to you)

Input your Email ID:	<input type="text"/>
<input type="button" value="SUBMIT"/>	

Figure 5

In the lower form, input your Email ID and click **SUBMIT**, whereupon you should see your password in your email INBOX, else in your spam folder. If you did not receive your password in your email, repeat the process, whereupon you should definitely see your password in your email.

When you input your password and click **SUBMIT** in the login screen (Figure 4), you will see the following **Admin Main Menu**:-

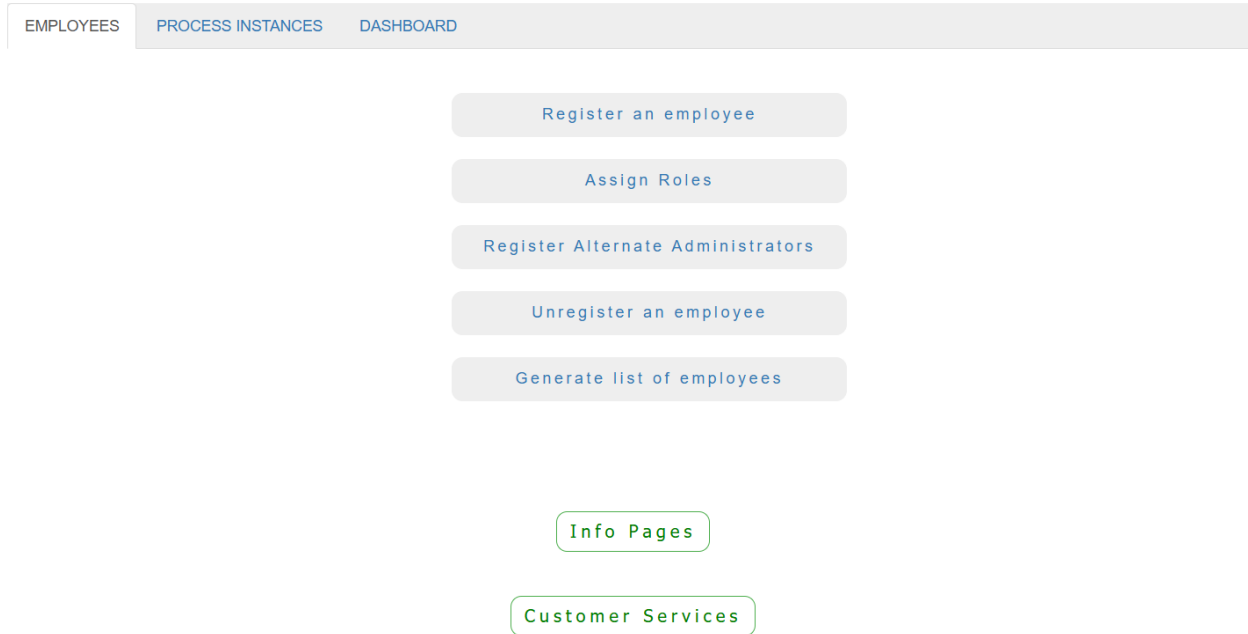


Figure 6

Under the **EMPLOYEES** tab, you can register one or more employees. By selecting **Assign Roles**, an employee can be assigned one or more of the following roles:-

Role	Purpose
EntityManSys	Employee can access the <i>Entity Management System</i> application, and create entities of type, Customer and Vendor
EntityAccSys	Employee can access the <i>Entity Accounting System</i> application, and maintain the accounts of customers, employees and vendors
InvManSys	Employee can access <i>Inventory Management System</i> application; define products, manage their inventory, as well as, their prices for online sale to customers
BuyProducts	Employee can access <i>BuyProducts</i> application, and fulfill Purchase Orders placed by customers online
SupportStaff	Employee can function as Support Staff in case of support requests received from customers via the <i>Helpdesk</i> application
SelfRegister	An individual can directly register himself / herself as a customer, by clicking BECOME OUR CUSTOMER, a button which will now appear at the bottom of the Main Menu (Figure 3); this essentially enables the eCommerce feature of ERP Fundamentals, whereby customers can buy your products online

You can select **Register Alternate Administrators**, and register one or more of the employees as Alternate Administrators.

And when you click **Generate List of Employees**, you will see the current list of registered employees, as well as know the roles assigned:-

LIST OF EMPLOYEES			
Sl. No.	Entity ID	Name	Email
1	ADMIN1	Sarah Connor	eflh003@gmail.com
2	ADMIN4	Gregory Peck	eflh009@gmail.com
3	ADMIN2	Burt Lancaster	eflh006@gmail.com
4	ADMIN3	Spencer Tracy	eflh007@gmail.com
5	ADMIN5	George Atilla	eflh010@gmail.com

Current assigned roles	
Employee	Roles
ADMIN1::Sarah Connor	EntityManSys, EntityAccSys, SelfRegister
ADMIN4::Gregory Peck	--
ADMIN2::Burt Lancaster	SupportStaff
ADMIN3::Spencer Tracy	InvManSys, BuyProducts, SelfRegister
ADMIN5::George Atilla	--

Figure 7

When you click **PROCESS INSTANCES** tab in the Admin Main Menu (Figure 6), you will see the following menu:-

EMPLOYEES	PROCESS INSTANCES	
		<div>List Current Process Instances</div> <div>List Archived Process Instances</div> <div>Search Archived Process Instances</div> <div>View Archived Process Instances</div> <div>Terminate Current Process Instance</div> <div>Terminate Archived Process Instance</div>

Figure 8

Only you, the Administrator, are authorized to terminate (i.e., completely remove from the database) a current or an archived business process instance.

2 INFO PAGES

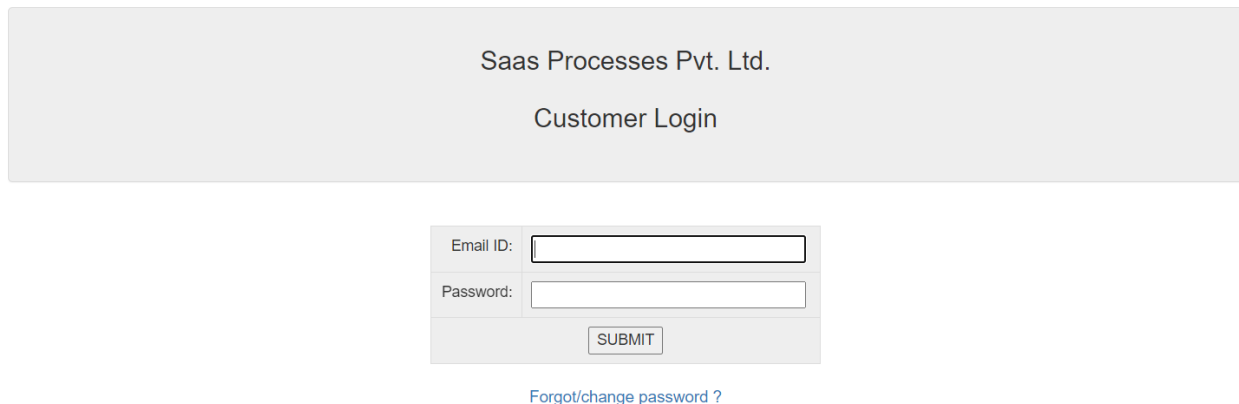
By clicking **Info Pages** (Figure 6), Administrator can, using a minimal knowledge of html and css, create one or more *named* Info Pages. These Info Pages will be accessible from within the rounded rectangle above the Main Menu (Figure 3).

An Info Page is editable; it can also be altogether archived by the Administrator.

The collection of Info Pages can also serve as the website (or as a supplement to the website) of your organization / company.

3 CUSTOMER SERVICES

Only the original Administrator can click **Customer Services** in the **Admin Main Menu** (Figure 6), and avail the services of SAAS PROCESSES PRIVATE LIMITED. Upon clicking **Customer Services**, this is the login form he / she would see:-

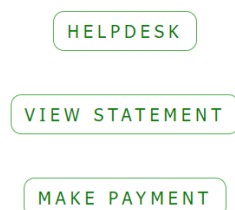


The image shows a login form for 'Saas Processes Pvt. Ltd.'. At the top, the company name 'Saas Processes Pvt. Ltd.' is centered, followed by 'Customer Login'. Below this is a form with two input fields: 'Email ID:' and 'Password:'. A 'SUBMIT' button is located below the password field. At the bottom of the form, there is a link that says 'Forgot/change password ?'.

Figure 9

Caution: The original Administrator must login using his / her *Customer Services password*, which is different from his Administrator password. In order to retrieve or change his / her Customer Services password, he / she should click [Forgot/change password ?](#) in Figure 9.

Upon logging in, he / she can access the following **Customer Services Menu**:-



The image shows three buttons arranged vertically: 'HELPDESK', 'VIEW STATEMENT', and 'MAKE PAYMENT'. Each button is green with white text and a rounded rectangular border.

Figure 10

Click **HELPDESK**, in order to avail our support. We will typically respond within 1 working day.

Click [VIEW STATEMENT](#), in order to view your account statement.

Click [MAKE PAYMENT](#), in order to make online payment of SaaS charges to SAAS PROCESSES PVT. LTD.