



**click2try**<sup>™</sup>

click2try<sup>™</sup> Tutorial

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## **OpenERP (TinyERP)**

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## Introduction

OpenERP is a popular and powerful Open Source enterprise resource management (ERP) system that includes over 300 modules you can configure for your specific purposes. Combining CRM capabilities with financial management, product inventory, human resource control, purchase management, sales management, and point-of-sale capabilities, OpenERP provides you a complete solution for managing your business. OpenERP offers a huge number of benefits:

- Over 300 functional modules for different business requirements
- Web-based system for ease of deployment
- Customizable interface
- Mature technology
- Large, active user community

In this tutorial, you'll learn how to navigate the OpenERP interface, by learning how to:

- Configure partners and categories
- Add employees to the system
- Configure a reorder point
- Create a purchase order

## Configuring Partners and Categories

Partners are anybody you work with, including customers, prospects, and suppliers. OpenERP contains a complete CRM solution, in addition to its ERP capabilities. You can also configure your partners with categories to segment partners in some meaningful way. For example, in one of the OpenERP demos, customers are segmented into bad customers and important customers.

To create categories for your business:

1. Click **Partners** in the left navigation panel.
2. Click **New**.
3. Enter a **Category Name**.
4. If the new category should appear below another category, such as suppliers, or customers, enter the **Parent Category**. You can click the file folder icon next to the **Parent Category** field to search the available categories.
5. Click **Save**.
6. Click **Main Menu** to return to the home page.

The screenshot shows the OpenERP web interface. At the top, there is a header with the OpenERP logo, the text "Open Source Management Software", and a navigation bar with "Welcome Administrator", "Home", "Preferences", "About", and "Logout". Below the header, there is a "MAIN MENU" and "SHORTCUTS" section. The "Partners" menu is selected, and a "Menu" panel is displayed on the right. The "Menu" panel contains a list of items: Configuration, Partners by Category, Partner Contacts, Partners, and Editor - Suppliers Relations. On the left, there is a "Toolbar" section with icons for Partners, Financial Management, Products, Human Resources, Inventory Control, Purchase Management, Sales Management, and Point of Sale. At the bottom, there is a footer with copyright information and server details.

To add a new partner:

1. Click **Partners > Partners**.
2. Click **New**.
3. Enter a partner **Name** and other information.
4. Enter a **Contact Name** and contact information. Wherever you see an icon next to a field, you can click it to search existing data or to create new data for that item of information.
5. Click **Save**.

6. Click **Main Menu**.

## Adding a New Employee

You'll want to add employees to OpenERP, so they can use the system and so you and others can assign tasks and projects to them.

To add a new employee:

1. Click **Human Resources**.
2. Click **Employees** to expand the selection.
3. Click **New Employee**.
4. Enter an **Employee** name.
5. Select **Company** by clicking the search resources icon and selecting from the list.
6. Click **Save**.
7. Click **Sign In**.

Signing in employees is especially useful if you have a controlled environment, such as a retail location or a manufacturing environment in which employees are required to use a timecard.

## Configuring Reorder Point

OpenERP provides many inventory control functions that can make life easier for a small or medium-sized company. You can configure delivery methods and pricelists, locations, traceability, reorder policy, packing lists, procurement orders, as well as automated schedulers. As an example, let's set up a minimum stock rule.

The screenshot displays the OpenERP web interface. At the top, the logo 'OpenERP' is visible, along with the text 'Open Source Management Software'. The user is logged in as 'Administrator' and is viewing the 'Partners' page. The 'MAIN MENU' is expanded, showing a list of categories: Partners, Financial Management, Products, Human Resources, Inventory Control, Purchase Management, Sales Management, and Point of Sale. The 'Inventory Control' category is selected, and the 'Menu' is expanded to show various options: Configuration, Delivery, Traceability, Reordering Policy, Physical Inventory, and Locations Structure. The 'Reordering Policy' option is expanded, showing 'Minimum Stock Rules' as a sub-option. The 'Delivery' option is also expanded, showing 'Delivery Method', 'Delivery Pricelist', and 'Locations'. The 'Traceability' option is expanded, showing 'Tracking Lots', 'Consumer Lots', and 'Production Lots'. The 'Physical Inventory' option is expanded, showing 'Lot Inventory Line'. The 'Locations Structure' option is expanded, showing 'Packing Lists' and 'Delivery Order'. The 'Minimum Stock Rules' option is selected, and the 'Delivery Method' option is also selected. The 'Delivery Pricelist' option is also selected. The 'Locations' option is also selected. The 'Tracking Lots' option is also selected. The 'Consumer Lots' option is also selected. The 'Production Lots' option is also selected. The 'Lot Inventory Line' option is also selected. The 'Packing Lists' option is also selected. The 'Delivery Order' option is also selected. The 'Switch', 'Action', and 'Print' buttons are visible at the top right of the menu.

To configure minimum stock rules:

1. Click **Inventory Control**.
2. Click **Reordering Policy** to expand the selection.

The screenshot shows the OpenERP web interface. At the top, there is a navigation bar with the OpenERP logo, 'Open Source Management Software', and a 'Welcome Administrator' message. A red bar contains 'Home Preferences About Logout' and 'Requests: 1 request(s)'. Below this is a 'MAIN MENU' and 'SHORTCUTS' section with a 'Partners' link. The main content area is titled 'Minimum Stock Rules' and includes a search bar and buttons for 'Save', 'Save & Edit', and 'Cancel'. The form contains the following fields:

Name :	OP/00007	Active :	<input checked="" type="checkbox"/>
Warehouse :	Warehouse	Product :	Basic PC
Product UOM :	Unit	Min Quantity :	3
Max Quantity :	25	Qty Multiple :	1
Purchase Order :			

At the bottom right of the form, there are links for 'MANAGE VIEWS' and 'CUSTOMISE VIEW'.

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The web client is developed by Axelor (<http://axelor.com>) and Tiny (<http://tiny.be>)  
Running Server: socket://localhost:8070 - database: bookstore\_en

3. Click **Minimum Stock Rules**.
4. Click **New**.
5. Select **Warehouse**, **Product**, and **Product UOM** from the demo resources.
6. Enter a **Max Quantity**.
7. Enter a **Min Quantity**. This is the number that will trigger an automatic reorder.
8. Click **Save**.

## Creating a Purchase Order

OpenERP provides you with the capability to manage your business purchases and to link right into your accounts payable. One of the most common tasks you may undertake is creating and managing purchase orders.

To create a new purchase order:

1. Click **Purchase Management**.
2. Click **Purchase Order**. OpenERP generates a new purchase order with the order number automatically generated.
3. On the **Purchase Order Line** section, click the switch view icon. This will open up the line items edit section.
4. Enter the required information, such as **Partner** name, **Pricelist**, and **Date Ordered**.
5. Enter **Quantity**, unit of measure (**UOM**) and any other required information.
6. When finished, click **Confirm Purchase Order**.

The screenshot displays the OpenERP web client interface. At the top, the OpenERP logo is on the left, and the user is logged in as 'Administrator' with options for 'Home', 'Preferences', 'About', and 'Logout'. Below the header, there are navigation tabs for 'MAIN MENU' and 'SHORTCUTS', with 'Partners' and 'Purchase Order' selected. The main content area shows a 'Menu' sidebar on the left with icons for 'Partners', 'Financial Management', 'Products', 'Human Resources', 'Inventory Control', 'Purchase Management', 'Sales Management', and 'Point of Sale'. The 'Purchase Management' menu is expanded, showing a 'Purchase Order' sub-menu with three items: 'Requests For Quotation', 'Purchase Orders Waiting Approval', and 'Purchase Orders in Progress'. At the bottom of the page, there is a footer with copyright information and server details.

## Conclusion

While this tutorial barely scratches the surface of the capabilities of OpenERP, you should, by now, have a general understanding of how to navigate the system. With over 300 functional modules available, OpenERP provides just about any capabilities your company might need to deploy.

## Resources

OpenERP is a mature and popular system. As such, there are many valuable online resources where you can learn more about OpenERP. Try these to start:

**OpenERP Demo** <http://openerp.com/demonstration.html> — Demonstration site containing several industry-specific demos, including service, manufacturing, and retail.

**OpenERP Documentation** [http://openerp.com/wiki/index.php/Main\\_Page](http://openerp.com/wiki/index.php/Main_Page) — Official OpenERP Documentation Wiki.

**OpenERP User Manual**  
<http://openerp.com/wiki/index.php/Documentation:UserManual> — Official OpenERP user manual.