ERPag Simple Implementation Guide

Goal: Set up ERPag to manage products, stock, purchases, sales, and basic workflows.

1. Create an ERPag Account

1. Go to https://www.erpag.com/
2. Click 'Free Trial' or 'Login' if you already have an account.
3. Fill in your company info.
4. Choose your currency, tax rules, and time zone during setup.

2. Initial Configuration

Navigate to Administration > Settings and configure the following:

- Company Information
- Default Tax Rate (e.g. VAT, GST)
- Currency
- Warehouse(s) if you have multiple locations
- Users/Roles under Administration > Users

3. Add Products (Inventory Items)

Go to: Inventory > Products

1. Click '+ New'
2. Fill in:

- Item Name
- SKU / Barcode
- Type: Product, Service, Raw Material, etc.
- Unit of Measure (e.g., pcs, kg)
- Purchase & Sale Price

3. Set minimum stock levels for alerts

4. Save

4. Record a Purchase (from Supplier)

Go to: Purchasing > Purchase Orders

1. Click '+ New'
2. Select or create a Vendor
3. Add products and quantities
4. Click 'Receive Goods' when stock arrives
5. Optional: Add Vendor Invoice to track payments

5. Make a Sale (to Customer)

Go to: Sales > Sales Orders

1. Click '+ New'
2. Select or create a Customer
3. Add products and quantities
4. Click 'Ship' when sending products
5. Add Customer Invoice for billing

6. Manage Stock & Warehouses

Go to: Inventory > Stock Level

- Track real-time stock
- Use Stock Adjustment for manual corrections
- Track across multiple warehouses or locations

7. Generate Invoices & Reports

Invoices: Created during sales/purchases.

Reports:

- Sales reports
- Inventory valuation
- Profit margin
- Stock movement

Navigate to Reports for built-in templates.

8. Add Users & Roles

Admins can invite team members:

1. Go to Administration > Users
2. Invite by email
3. Assign roles like:

- Sales
- Inventory
- Manager
- Accountant

Bonus Tips

- Use the Mobile App for scanning barcodes and on-the-go updates
- Automate reorder levels with alerts
- Integrate with QuickBooks or Xero for accounting
- Use Manufacturing Module for BOMs, Work Orders

Next Steps

- Try a full workflow: Add product → Purchase → Sell → Report
- Set up alerts & automation
- Invite your team