Easy Implementation of Standard ERP

Preparation

1. StandardID with no servers added but ability to create new servers.

Script

Hello! In this video, we will explain why Standard ERP is so fast to implement.

We will point out a few key factors in this video, like server set-up, software installation, system set-up and data import.
Let me begin with the server setup.

Usually, servers are automatically created in HansaWorld cloud using the MyStandard portal.

> **ACTION: Open https://mystandard.hansaworld.com**

I will log in to the portal using my Standard ID.

> **ACTION: Log in to MyStandard with the pre-created StandardID**

I am able to manage my servers in the MyStandard portal if I have any. Since I do not, I will create a new one.

> **ACTION: Click More -> Create New Server**

The portal will ask me to specify the details of my server. Here, I will choose where the server will be created and what country, version, and product will be used.

> **ACTION: Choose Node, Country, Standard ERP, Current Release as version and choose Clasification**

I will call my server "Demonstration Server".

> **ACTION: Enter name "Demonstration Server"**

I can restore the server to an existing backup or use a template to set up a fresh system using a pre-configured system.

ACTION: Choose to upload back-up as attached TB.TXT

And create the server.

ACTION: Press Submit

That's it! No other actions are required to create a fully functional server! HansaWorld's unique infrastructure does not require set-up or integration with any 3rd party software, not even a database, making the server set up fully automated and simple!

We can connect to this new server with almost a single click. I can either connect to the server with a WEB client or download a client to my computer.

ACTION: Select the new server, Start it, then click 'Connect' and choose 'Download Client'

After simply adding the client to my computer, I can connect it to the server. I will log in with my Standard ID and password.

ACTION: Install the downloaded client, run Standard ERP, log in with: sample@hansaworld.com and Password: Sample99

As we have created the server from an almost empty backup, most of the system registers and settings will be empty. For example, there is no chart of accounts in this system.

ACTION: Open Nominal Ledger -> Registers -> Accounts

There are no VAT Codes set up either.

ACTION: Open Nominal Ledger -> Settings -> VAT Codes

In this case, we will use the standard chart of accounts for the United Kingdom and the standard VAT setup. I will import these settings from templates, but first I will open this file to show you what it contains.

ACTION: Open the UKAccs.TXT file in a spreadsheet (e.g. Numbers) and scroll through

You can see that this file contains several settings and a chart of accounts. If required, it is possible to edit this file before importing, or you can even create a new one from scratch, if we need to import an actual chart of accounts from a customer's existing system for example.

Most ERP systems allow the user to export data from them (including Chart of Accounts, Customers, Items, etc) and import data into Standard ERP. Now let's import the file.

> **ACTION: System -> Routines -> Imports -> Manual file search and import file: UKAccs.TXT**

I have now imported the UK standard chart of accounts, as well as the other settings.

> **ACTION: Open Nominal Ledger -> Registers -> Accounts**

Now, let's import the required details for tax legislation in the United Kingdom by first taking a look at the import file.

> **ACTION: Open the UKSTD.TXT file in a spreadsheet (e.g. Numbers) and scroll through**

As you can see, this file also contains several settings besides the VAT codes which we are importing as we want to have a standard set-up for the UK. I will now import the file.

> **ACTION: System -> Routines -> Imports -> Manual file search and import file: UKSTD.TXT**

I have now imported the VAT set-up and other settings to meet UK local requirements.

> **ACTION: Open Nominal Ledger -> settings -> VAT Codes**

Let us assume that we want to transfer our customer and item database from an existing system. We do not currently have any customers or suppliers in our system.

> **ACTION: Open Sales Ledger -> Registers -> Contacts**

To import the existing customers, I have prepared a simple text file with the data I am transferring from another source to Standard ERP. Let me show you the file.

> **ACTION: Open the Customers.TXT file in a spreadsheet (e.g. Numbers) and scroll through**

As you can see, it contains the data about customers from another source. I will now import the file.

> **ACTION: System -> Routines -> Imports -> Manual file search and import file: Customers.TXT**

There, my customers were successfully imported!

> **ACTION: Open Sales Ledger -> Registers -> Contacts**

I'll now import the Items in the same way by showing you the file first.

> ACTION: Open the Items.TXT file in a spreadsheet (e.g. Numbers) and scroll through

The file contains all the required details about the items we are transferring from our other system. I will import the file now.

> ACTION: System -> Routines -> Imports -> Manual file search and import file: Items.TXT

Any data can be imported into the system in the same way, allowing the user to do it at any point, for example, when adding vertical solutions in later implementation stages. I can import any register or setting from other sources into Standard ERP.

As we now have Customers and Items set up, I can start using the system. I will issue an Invoice to a customer.

> ACTION: Sales Ledger -> Registers -> Invoices -> Create -> New Invoice

I will specify the customer and the item that I am selling.

> ACTION: Enter Customer code and enter Item code, save the record.

It's as easy as that! I have a fully functional system in less than 10 minutes! With the tools that HansaWorld offers, system implementation requires less knowledge, less time, and results in a faster implementation with lower costs!