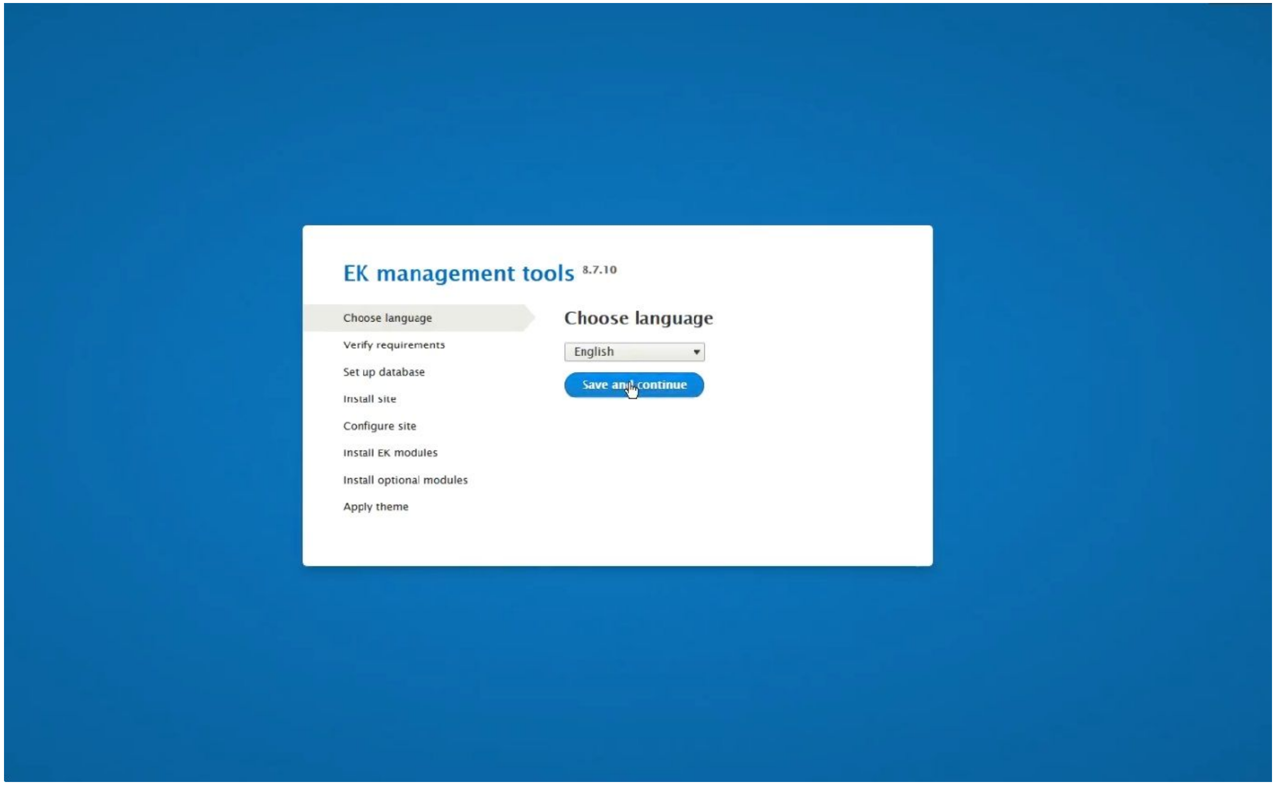
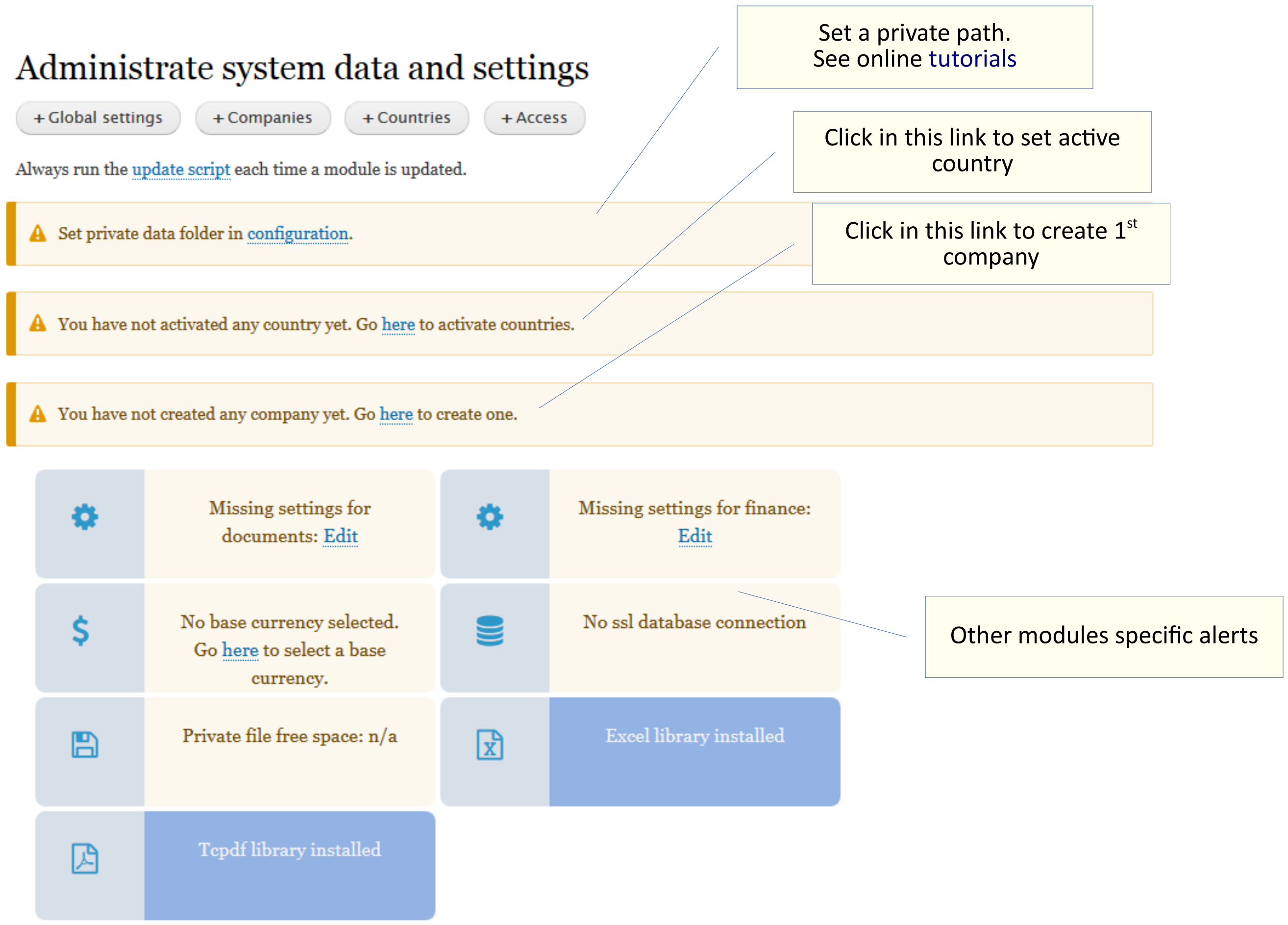
Review of installation settings

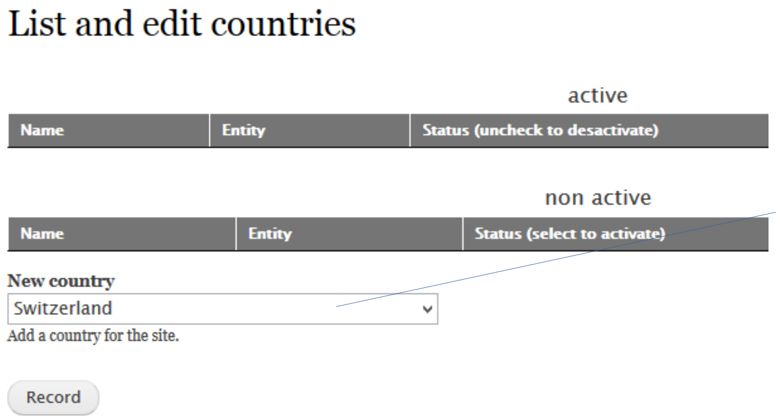
Overview of main initialization and settings


EK management tools 8.7.10
Choose language
Verify requirements
Set up database
Install site
Configure site
Install EK modules
Install optional modules
Apply theme
Choose language
English
Save and continue

Once profile installation and database are installed, you will be redirected to main administration control panel



1) Activate countries of operation

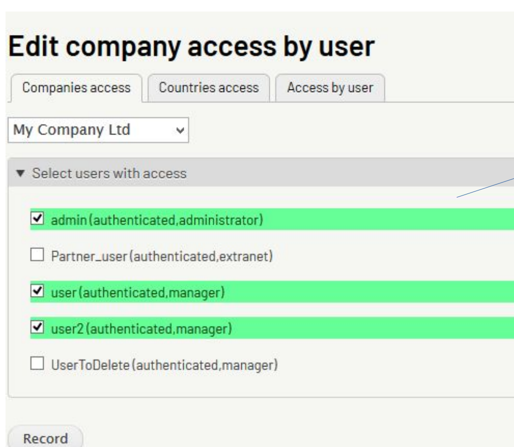


Select country to activate in list and click "Record"

2) Create a company

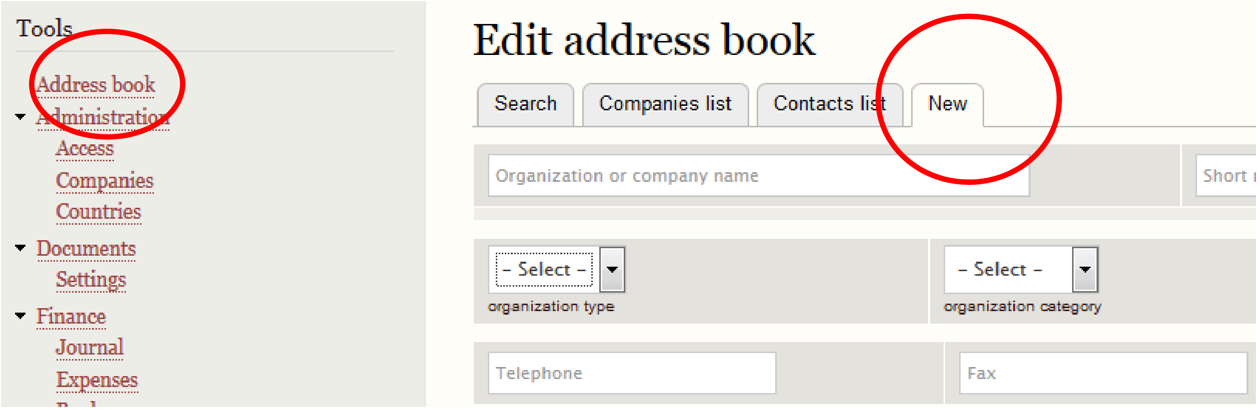
Input new company data and click "Save"

3) Define companies and countries access by user



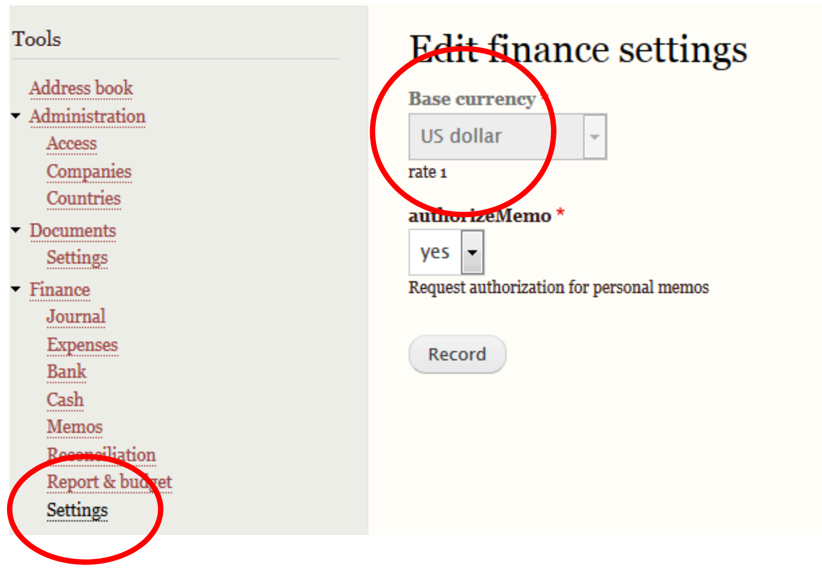
Select user who have access to your company

4) Record clients and suppliers data

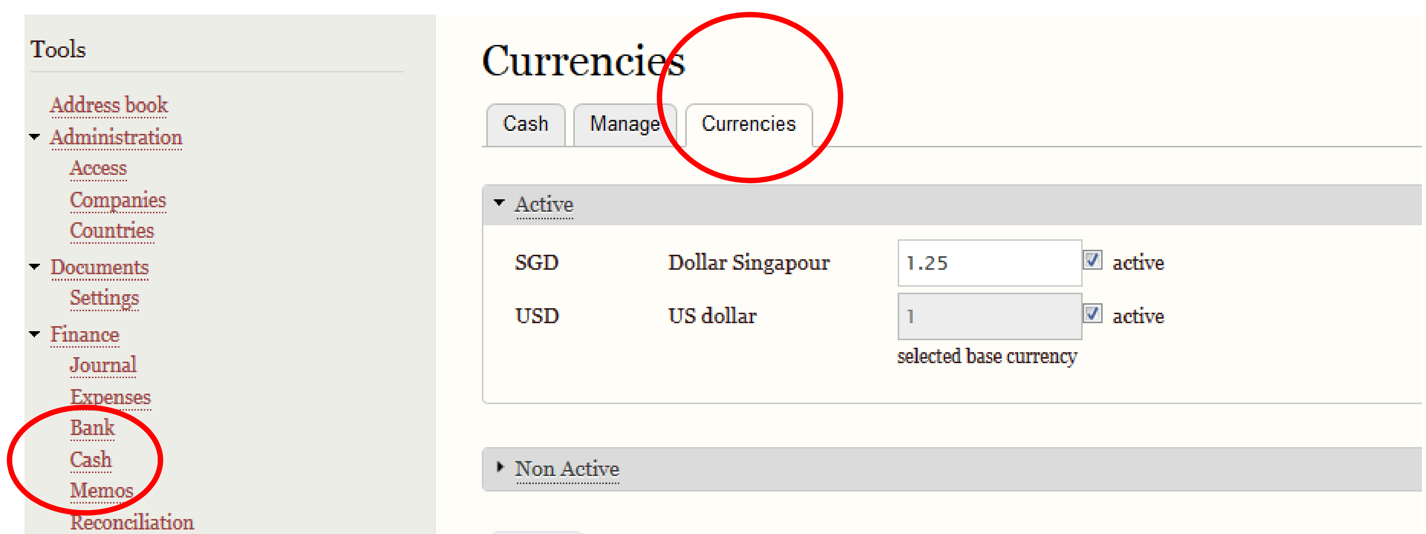


5) Create the journal accounts as needed (basic structure is already recorded. Finance module only. For more details go to 'accounts-setup-basic' ref. manual)

6) Define base currency (Finance module only.)

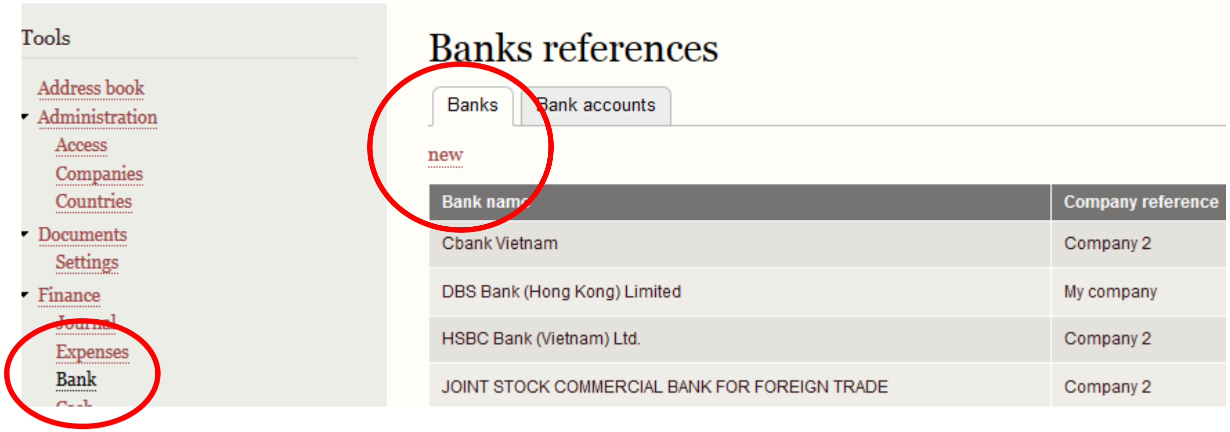


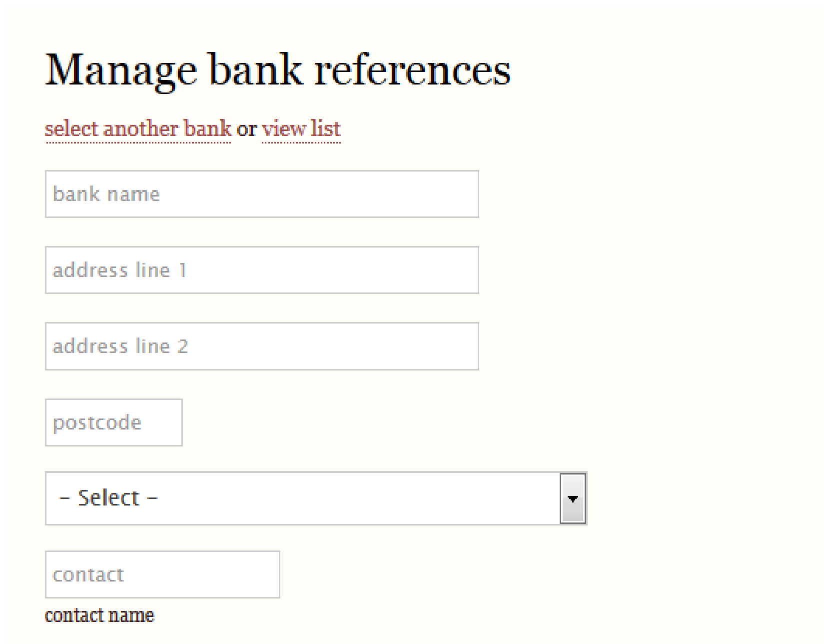
7) Select active currencies (multi currencies settings; Finance module only.)



8) Record bank reference as needed

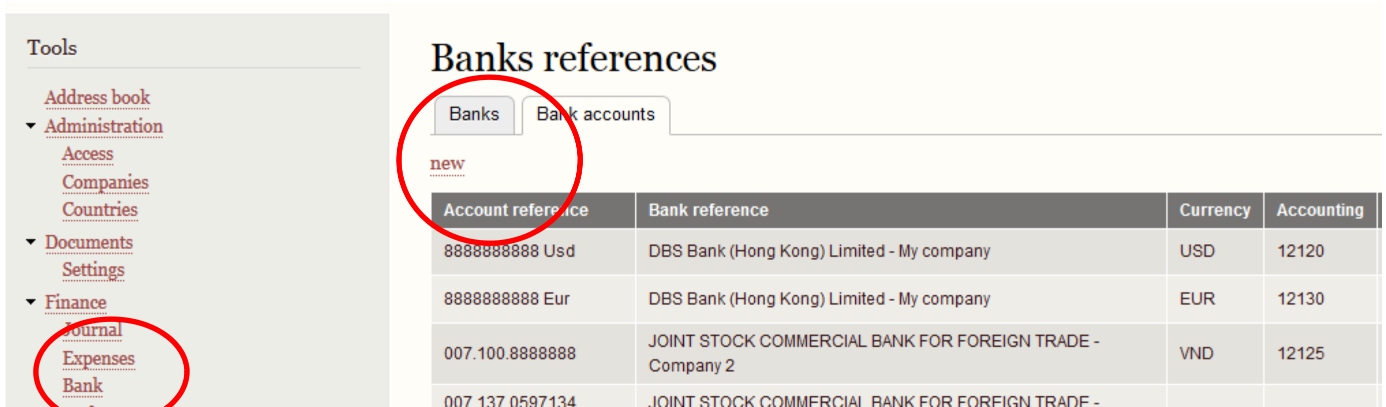
(Finance module only)

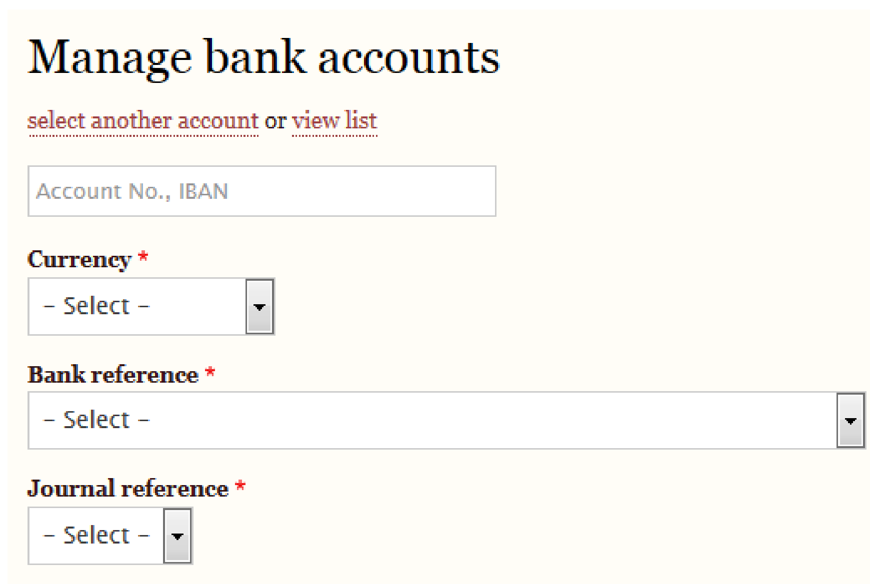




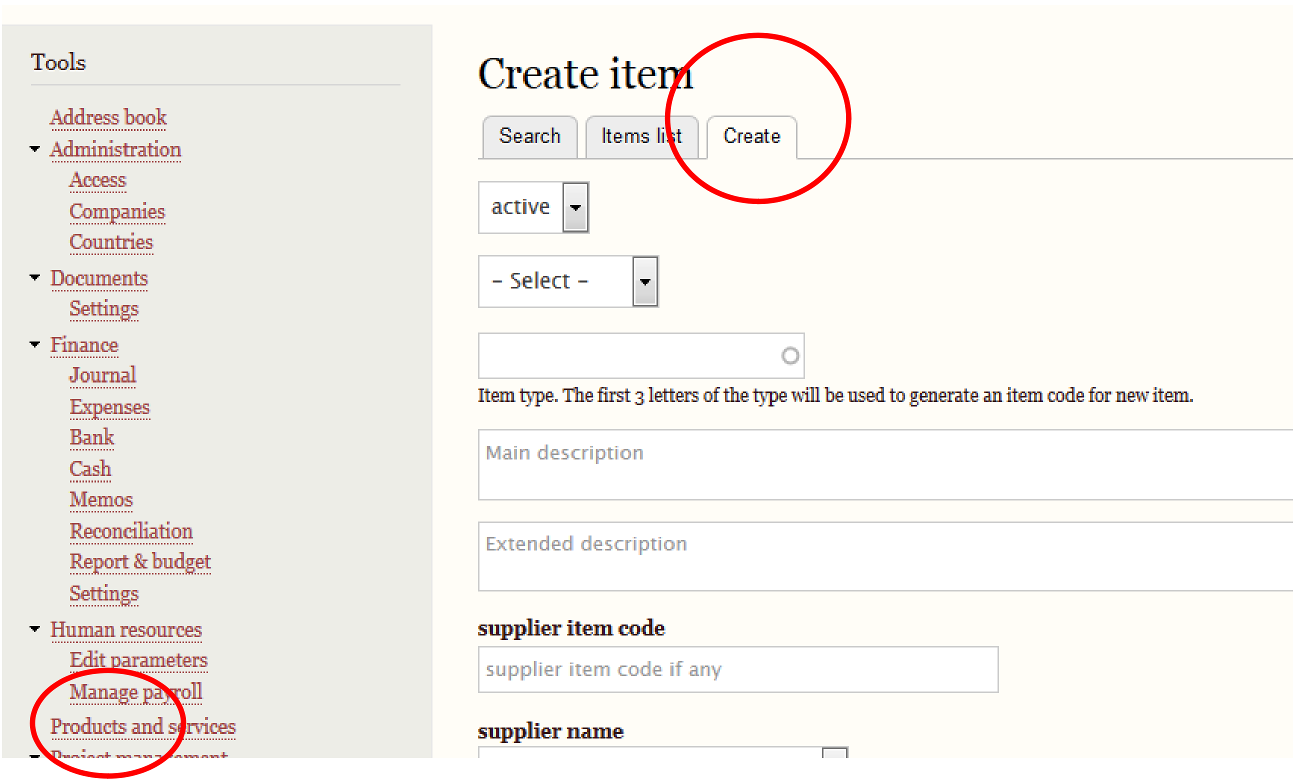
9) Record bank accounts as needed

(finance module only)

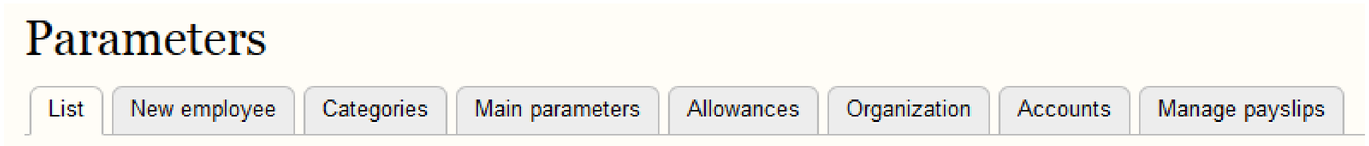




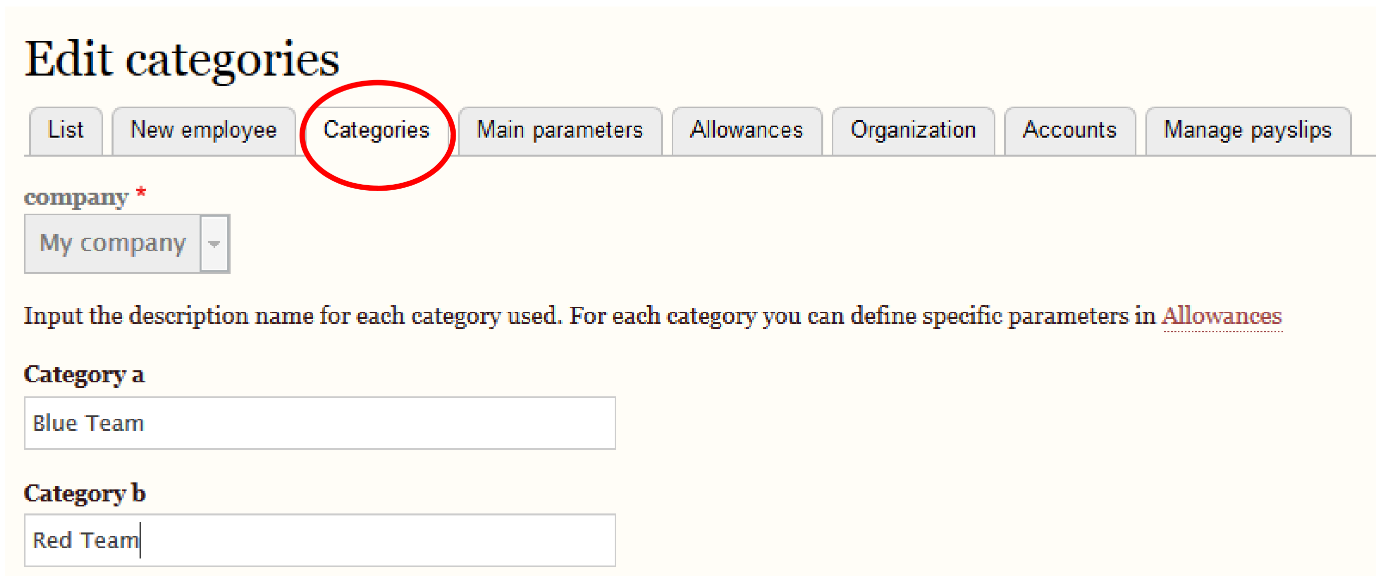
10) Record products and services as needed



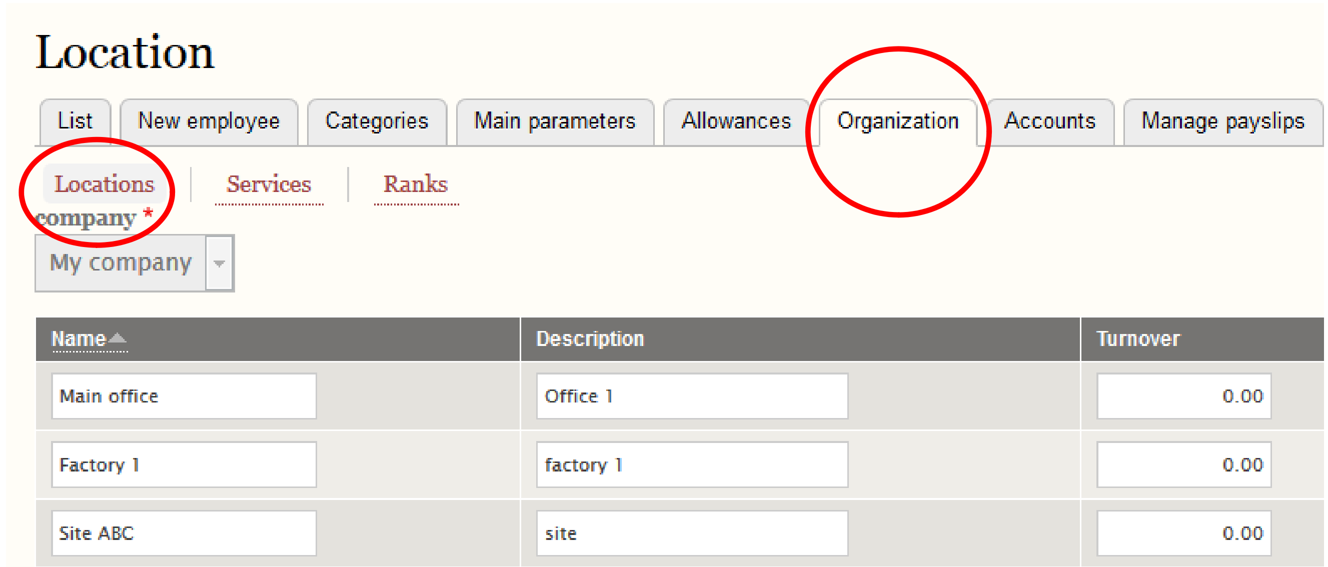
11) Payroll - parameters



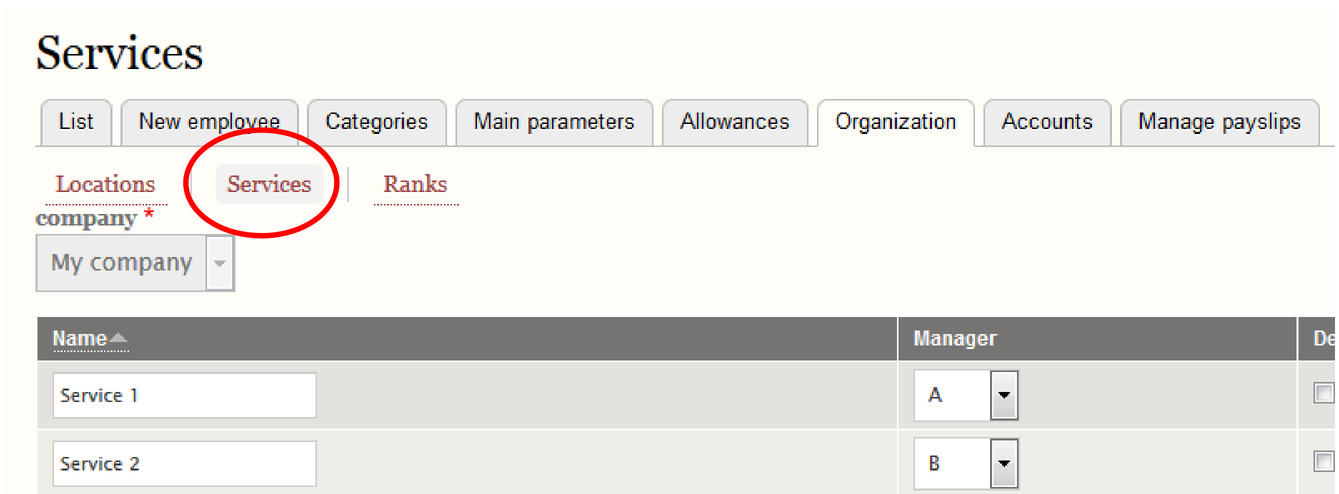
12) Create employees categories first



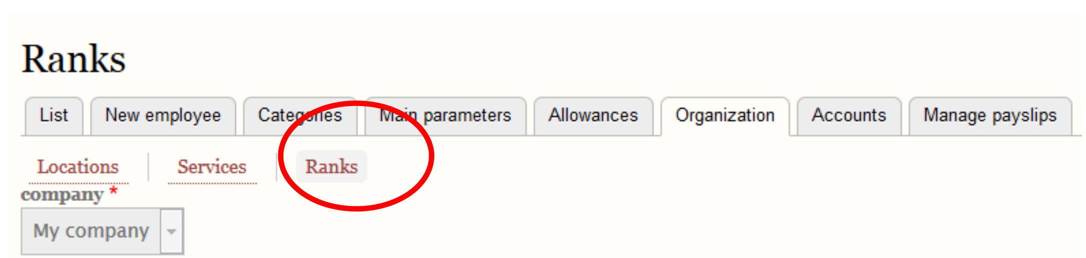
13) Create working locations



14) Create working services



15) Define / upload ranks file



Ex. Of ranks file structure

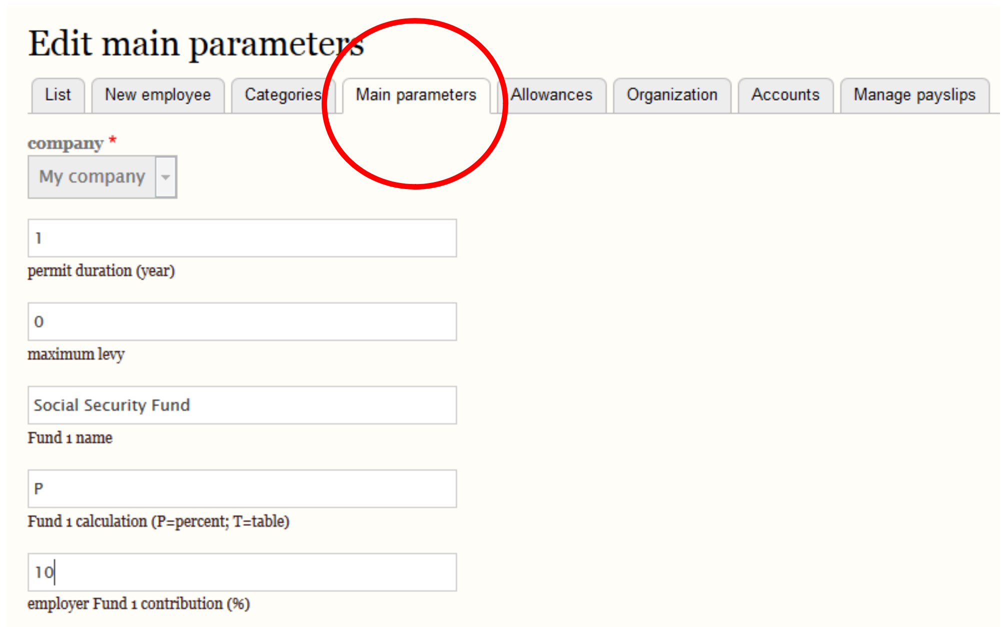
@ADMINISTRATION,
1 General manager,
2 Executive,
3 Clerk,

@SALES,
1 Manager,
2 Secretary,

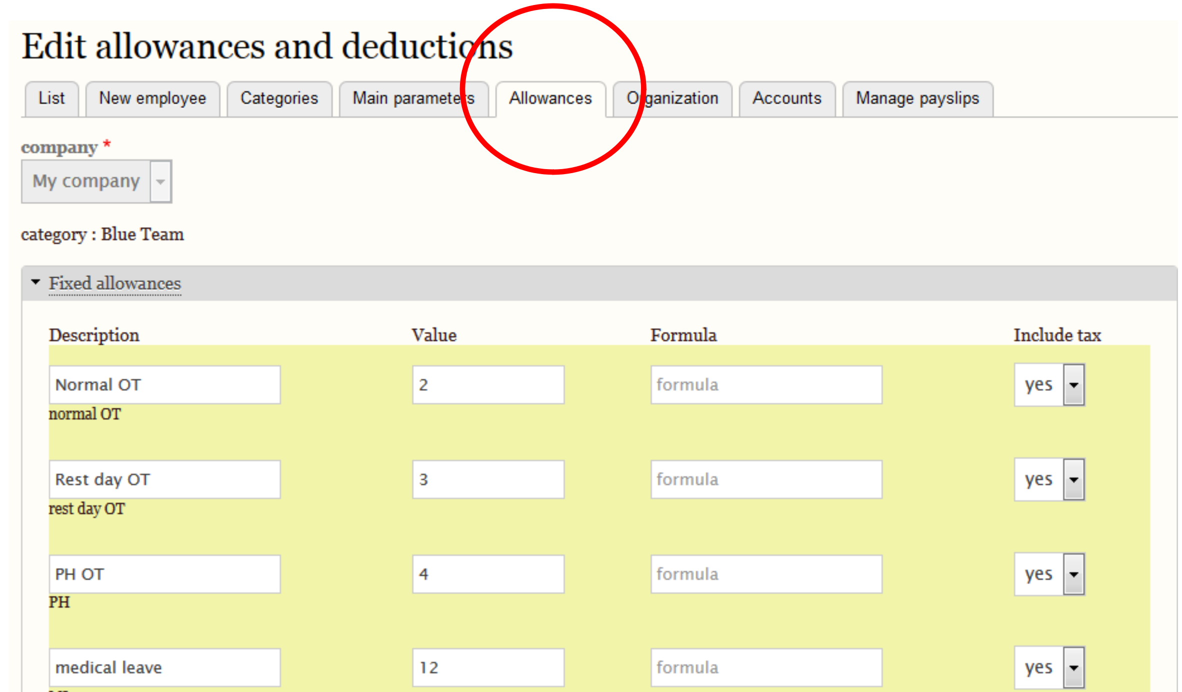
@ENGINEER,
1 Senior Engineer,
2 Junior Engineer,

Save the structure in a text file (I.e. myfile.txt) and upload it.

16) Input payroll global parameters

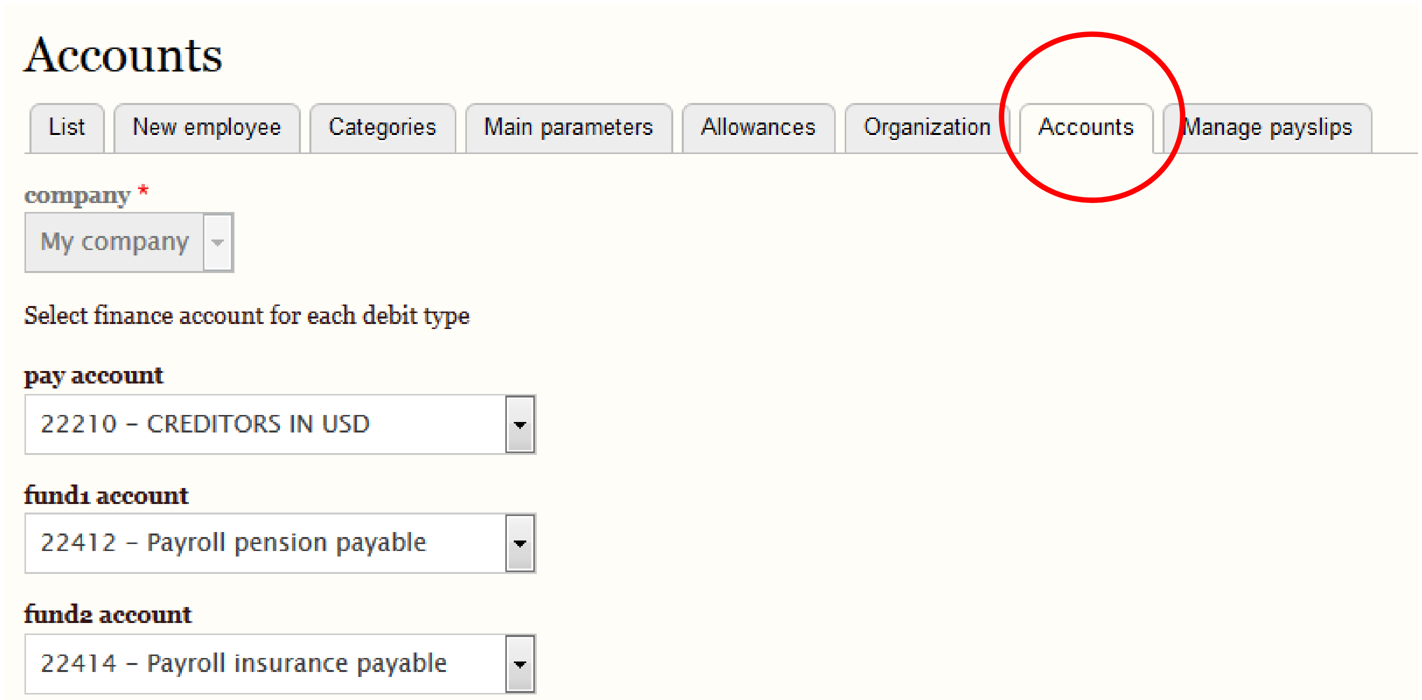


17) Input allowances per defined category



18) Allocate journal accounts per allowance type

(finance module only. Ref. to journal for accounts available)



19) How to setup cron tasks for server adminitrator?

This cron job will do the scheduled checks and emails used by various modules.

The system uses the cron key generated by Drupal cron.

The key can be retreived from /admin/config/system/cron

To run cron from outside the site, go to http://localhost/Drupal/drupal8/d8_beta12/cron/LdZkrKXJDDBqeTbBDwaZejLFiHbwK7fNXz4Y5sqRyhHsAj_p68Ac8Nvkh5s

To setup cron on the server, point the cron job command to the url :

<PROTOCOL> ://< SERVER ADDRESS > /admin/cron/task/ < DRUPAL KEY >

The system will check on :

- project status
- project tasks
- purchase tasks
- sales status
- sales tasks

ARREA
Systems

EK