Getting Started

How to sign in, what you see on the Home dashboard, and how the Export ERP workflow fits together from purchase order to completed shipment.

- What Export ERP Does
- Signing in
- Finding your way around
- Your account

What Export ERP Does

TL;DR

> Export ERP is where an export company keeps track of its customer orders and everything that happens to them. It holds each order a customer places, the invoice raised when goods are ready to leave, the way those goods are packed into cartons, and the pallets those cartons travel on. At the end, it produces the shipping paperwork: the tax invoice, the packing list, and the other documents a shipment needs. Everything about one shipment stays in one place, from the first order to the final paperwork.



How work moves through the system

Follow one shipment from start to finish.

> **IMAGE PLACEHOLDER: overview-workflow-01** · infographic · status: pending
>
> **Shows:** the five stages one shipment passes through, at a glance
>
> **Must include:** Purchase Order, Invoice, Packaging, Pallet, Documents in that order; that a stage begins once the previous one exists; that the shipment can only be completed when every stage is filled in
>
> **Must not show:** any real customer name, order number, or company data
>
> **Alt text (draft):** The five stages of a shipment in order: purchase order, invoice, packaging, pallet, then documents. Each stage begins once the one before it exists, and the shipment can only be completed when all of them are filled in.

A customer sends in an order. You enter it as a **purchase order**: which customer, which products, how many, and at what price. The order now sits in Export ERP as "Pending": agreed, but nothing shipped yet.

When goods are ready to leave, you raise an **invoice** from that order. You can invoice the whole order or only the part that is ready. The rest stays on the order for later. A new invoice carries a temporary draft number, not its final number.

Next comes **packaging**. You say how the invoiced goods are packed: how many pieces go in each carton, how many cartons there are, and what each carton weighs. This becomes the packing list.

Then come **pallets**. You say which cartons sit on which pallet, and what each pallet measures and weighs. Shipments that travel by sea must have their cartons on pallets before the shipment can be finished, unless pallets were switched off for that invoice. Shipments that go by air may skip pallets.

You will notice that an order's status changes without you touching it. Raising an invoice moves the order from "Pending" to "In Progress" on its own, and packing progress moves it further along. If invoices or packing are removed, the status moves back again. This is normal and does not mean anything has gone wrong.

Finally, you mark the invoice as **complete**. The invoice receives its real number and the shipment can no longer be changed.

You do not have to wait until then to see the paperwork. Once packing is filled in you can print any document, but it will be marked "DRAFT" and will not carry a real invoice number. Only after the invoice is marked complete does the paperwork carry its final number.

Some steps cannot be undone, and marking an invoice complete is one of them. There is no way back. Later modules point these out where they arise.

The stages always run in this order. You can start a stage as soon as the one before it exists. You do not have to finish it first. So you can begin arranging pallets while you are still weighing cartons.

What you cannot do is finish early. The shipment cannot be marked complete, and its final paperwork cannot be printed, until every stage has been filled in. Export ERP checks this for you.

What you will find in each part of the system

These are the entries in the menu bar at the top of every screen.

Menu	What it is for
Home	The first screen after you sign in. It shows counts and your most recent shipments.
Master	Lists you set up once and pick from later: ports, carton types, currencies, and units of measurement.
Company Data	Your own companies, your customers, and the products you sell.
Purchase Order	Every order your customers have placed, and how far along each one is.
Invoice	Every shipment, from first draft to completed dispatch.
Packaging	How each shipment's goods are packed into cartons.
Pallet	How each shipment's cartons are loaded onto pallets.
User Management	Who can sign in, and what each person is allowed to see and do.
Reports	Ready-made summaries: order progress, pending items, shipment history, and totals by customer or product.

What you see in this menu depends on what you are allowed to do. If an entry is missing for you, your administrator has not given you access to it.

You may also see only part of the data. Each person is assigned to one or more companies, and orders, invoices, customers and companies belonging to other companies do not appear for them at all. The shared lists under Master (ports, carton types, currencies and units) are visible to everyone. Products are visible to everyone as well, even though they sit under Company Data. So an order list that looks empty may only mean you have not been assigned to the right company. Ask your administrator if you expect to see something and do not.

Some words this guide uses often

- **Purchase order (PO)**: a customer's order, as you entered it into Export ERP.
- **Dispatch**: sending goods out. The *dispatch quantity* is how much of an order leaves on one invoice.
- **Draft number**: the temporary number an invoice carries until it is completed. The real invoice number arrives only at the end.
- **Carton**: one packed box in a shipment.
- **Pallet**: the platform cartons are stacked on for shipping.
- **Master**: a list you set up once (ports, carton types, currencies, units) and then pick from everywhere else.
- **Mark as Complete**: the final step for a shipment. The invoice gets its real number and the shipment locks; nothing about it can be changed afterwards.

The Glossary module at the end of this guide explains the rest.

What Export ERP does not do

- **It does not send email.** No message goes to a customer or a colleague when something happens. Paperwork reaches people because you download it or print it and send it yourself.
- **It does not handle money.** It calculates amounts and taxes for the paperwork, but no payment is made or received through it, and it does not keep track of payments.
- **It does not talk to outside services.** There is no link to shipping lines, customs, courier tracking, or banks.
- **It has no "forgot password" option.** If you forget your password, an administrator sets a new one for you. If you know your current password, you can change it yourself under your name at the top right, via "Change Password".

FAQs

Why is a list empty even though I can open the screen?

Permission opens the screen; company assignment fills it. Orders, invoices, customers and companies belonging to companies you are not assigned to do not appear for you at all. Ask your administrator which companies your account lists.

Why did my order's status change on its own?

Raising an invoice moves the order from "Pending" to "In Progress" automatically, and packing progress moves it further along. If invoices or packing are removed, the status moves back again. This is normal and does not mean anything has gone wrong.

Can I print paperwork before the shipment is finished?

Yes. Once packing is filled in you can print any document, but it will be marked "DRAFT" and will not carry a real invoice number. The final paperwork, with its real number, is only available after the invoice is marked complete.

Can I undo "Mark as Complete"?

No. Marking an invoice complete gives it its real number and locks the shipment; nothing about it can be changed afterwards. There is no way back.

Does Export ERP email documents or handle payments?

No. It sends no email, makes and records no payments, and has no link to outside services. Paperwork reaches people because you download or print it and send it yourself.

What if I forget my password?

There is no "forgot password" option on the sign-in screen. An administrator sets a new password for you. If you know your current password, you can change it yourself under your name at the top right, via "Change Password".

Where to go next

If Export ERP is being set up for the first time, go to **Master Data Setup**. The lists there have to exist before you can enter your first order.

If it is already set up and you need to enter an order, go to **Purchase Orders**.

The **Glossary** at the end of this guide explains any term you come across that is not covered here.

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Signing in

TL;DR

> This page covers signing in, the password rules, and what happens when a session ends. There is no way to reset your own password. If you cannot get in, an administrator must set a new one for you.

What you need before you start

An administrator creates your account and tells you your email address and password directly. The system never sends email, so there is no message to wait for.

Passwords have a required format: at least 8 characters, with an uppercase letter, a lowercase letter, a number, and a symbol.

Signing in

1. Open Export ERP in your browser. The sign-in screen opens.
2. Fill in **Email** and **Password**. The eye button beside the password shows what you typed.
3. Select **Continue**. The button reads "Please wait..." while it works.

You land on the Dashboard: the first screen, with counts, charts and your most recent shipments. If you opened a link to a specific page before signing in, you land on that page instead.

Errors you may see

What happened	What you see
You left the email empty	"Please enter email."
The email is not shaped like an email address	"Please enter a valid email address."

What happened	What you see
You left the password empty	"Please enter password."
The password you typed is shorter than 8 characters	"Password must be greater than 8 characters."
The password you typed is missing a required kind of character	"Use at least 8 characters, including uppercase and lowercase letters, numbers, and symbols."
Wrong password, mistyped email, or a closed account	"These credentials do not match our records."
Five failed tries in a row	"Too many login attempts. Please try again in 60 seconds." The number counts the wait down.

If you cannot sign in

The same message covers three different problems. "These credentials do not match our records." appears for a wrong password, for an email with no account, and for an account that has been closed. The message alone does not tell you which happened.

There is **no way to reset your own password**. The screen has no reset link, and the system sends no email. An administrator must set a new password on your account and tell it to you directly.

The format is checked before the password itself. If your account is older and its password does not meet the format above, signing in refuses with the format message, no matter how correctly you typed it. Nothing on screen explains this. The only fix is an administrator setting a new password that meets the format.

After five failed tries, sign-in pauses. Wait out the message's countdown (about a minute), then try again.

If none of this helps, ask your administrator to check your account and set a new password.

Staying signed in

You stay signed in while you work. After 2 hours without activity, your session ends.

Closing the browser does not sign you out. Reopen it within those 2 hours and you continue where you left off.

When the session ends in the middle of a task, your next save shows a page reading "Page Expired", and what you typed on that screen is lost. On long forms, save as you go.

If your account is closed while you are working, the next thing you do returns you to the sign-in screen with no explanation. Signing in again then reports "These credentials do not match our records.".

Signing out

Select your name at the top right, then **Sign Out**. You return to the sign-in screen.

FAQs

I forgot my password. Where is the reset link?

There is none. The screen has no reset link and the system sends no email. An administrator must set a new password on your account and tell it to you directly.

Why is my correct password refused with the message about the format?

The format is checked before the password itself. If your account is older and its password does not meet the required format, signing in refuses with the format message no matter how correctly you typed it, and nothing on screen explains this. The only fix is an administrator setting a new password that meets the format.

What does "These credentials do not match our records." actually mean?

The same message covers three different problems: a wrong password, an email with no account, and an account that has been closed. The message alone does not tell you which happened.

Why has sign-in stopped accepting any tries at all?

After five failed tries in a row, sign-in pauses and shows "Too many login attempts. Please try again in 60 seconds." with the number counting down. Wait out the countdown, about a minute, then try again.

Does closing my browser sign me out?

No. Reopen the browser within 2 hours and you continue where you left off. Your session only ends after 2 hours without activity, or when you select Sign Out under your name at the top right.

Why did I get a "Page Expired" page and lose what I typed?

Your session ended in the middle of the task, after 2 hours without activity. Your next save shows "Page Expired" and what you typed on that screen is lost, so on long forms, save as you go.

Related pages

- Finding your way around: the menu bar, and why some entries may be missing for you
- Your account: changing your own name and password
- What Export ERP Does: what the system holds and how work moves through it

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Finding your way around

TL;DR

> This page describes the menu bar, the shape every list screen shares, and what a screen looks like when something is missing. Menu entries you do not have access to are absent rather than greyed out, so a shorter menu is normal. Use this page on your first day, then rarely.

The menu bar

Every screen shows the same menu bar at the top. The entries, in order, with what each opens:

- **Home**: the Dashboard: the first screen after you sign in, with counts, charts and your most recent shipments. The Reports & Dashboard part of this guide describes it in detail.
- **Master**: opens a list of choices: **Port of Loading**, **Carton**, **Currency**, **Unit Of Measurement**
- **Company Data**: opens: **Company**, **Customer**, **Product**
- **Purchase Order**: your customers' orders
- **Invoice**: every shipment, from draft to completed
- **Packaging**: how each shipment's goods are packed into cartons
- **Pallet**: how each shipment's cartons are loaded onto pallets
- **User Management**: opens: **Users**, **Roles**
- **Reports**: opens: **Invoice Wise PO**, **Pending Order Items**, **Shipment Detail**, **Item Dashboard**, **Customer Dashboard**

At the right-hand end, your own name and email address open a small menu: **My Profile**, **Change Password**, **Documentation**, **Sign Out**.

Documentation opens this guide in a new tab. The same link sits in the footer at the bottom of every screen. It is the one menu entry that leaves Export ERP, and it is there whatever your access.

What you see and why

The menu shows only the parts of the system you have access to. **Home** and the menu under your name are always there; everything else can be absent. If an entry is missing for you, your administrator has not given you access to it.

Access has two separate halves, and they explain most surprises:

- **What you can do** comes from your role: which screens open, which buttons appear.
- **What you can see** comes from the companies on your account: whose orders, invoices, customers and companies fill those screens.

The two combine. You can have full access to invoices and still see an empty invoice list, because none of the invoices belong to your companies.

Products are the exception. Every product is visible to everyone, whatever their companies, even though products sit under Company Data. The shared lists under Master (ports, cartons, currencies and units) are visible to everyone in the same way.

How access works explains both halves fully.

Finding a screen that is not in the menu

A few screens open from inside another screen rather than from the menu bar:

- The screens where you fill in **packaging** and **pallets** open from within the Packaging and Pallet lists.
- The product **upload history** (past bulk uploads of products) opens from a button on the Product list.
- **My Profile** and **Change Password** open only from your name at the top right.

If you cannot find a screen, start from the list it belongs to.

What the buttons mean

The same controls appear on lists across the whole system:

- Small icons at the end of each row act on that row. Rest the pointer on an icon to see its name. Most lists offer "Edit", "Delete" and sometimes "View".

- Removing something always asks first. The dialog warns "You won't be able to revert this!" and the confirming button reads **Yes, delete it!**.
- Switching something on or off with a Status switch also asks first; the confirming button reads **Yes, change it!**.
- An **Export** button on a list offers Excel, CSV and PDF copies of that list.
- Green success messages and red error messages appear at the top of the screen and disappear on their own after 5 seconds.

FAQs

Why is my menu shorter than a colleague's?

The menu shows only the parts of the system you have access to; entries you lack are absent rather than greyed out, so a shorter menu is normal. Only Home and the menu under your name are always there. If an entry is missing, your administrator has not given you access to it.

Why is my invoice list empty when I have full access to invoices?

What you can do comes from your role, but what you can see comes from the companies on your account. You can have full access to invoices and still see an empty list because none of the invoices belong to your companies.

Why can I see every product but not every customer?

Products are the exception: every product is visible to everyone, whatever their companies, even though products sit under Company Data. The shared lists under Master (ports, cartons, currencies and units) are visible to everyone in the same way, while other data follows your company assignments.

Where are the packaging, pallet and upload history screens?

They open from inside another screen rather than from the menu bar: packaging and pallet entry open from within the Packaging and Pallet lists, and the product upload history opens from a button on the Product list. If you cannot find a screen, start from the list it belongs to.

Can I undo removing something from a list?

No. Removing something always asks first, and the dialog warns "You won't be able to revert this!" before you confirm with "Yes, delete it!".

Why did the green message at the top of the screen vanish?

Green success messages and red error messages disappear on their own after 5 seconds. Nothing is wrong; the action still happened.

Related pages

- Signing in: getting into the system, and what the sign-in errors mean
- Your account: the menu under your name
- What Export ERP Does: what each menu entry is for
- How access works: roles and company assignments in full

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Your account

TL;DR

> This page covers your own account: your name, your password, and what you cannot change yourself. Your email address, your role and your companies are all set by an administrator. Changing your password does not sign you out anywhere else.

What you can change

You can change two things about your own account: your name, and your password. Everything else (your email address, your role, your companies) is set by an administrator.

Both changes start from your name at the top right of any screen.

Changing your name

1. Select your name at the top right, then **My Profile**. The "My Profile" screen opens.
2. Change **Full Name**.
3. Select **Save Changes**. You see "Profile has been updated successfully!". (**Cancel** returns to the Dashboard without saving.)

The Email box on this screen **cannot be changed**. It looks like a box you could type in, but it is fixed. Clicking it does nothing, and nothing you do on this screen alters it. Only an administrator can change your email address.

Changing your password

1. Select your name at the top right, then **Change Password**. The "Change Password" screen opens.
2. Fill in **Current Password**, **New Password** and **Confirm Password**.
3. Select **Save Changes**. You see "Password has been changed successfully!".

The new password needs at least 8 characters, with an uppercase letter, a lowercase letter, a number, and a symbol. These are the same rules an administrator follows when setting a password for you. A password that works for one works for the other.

Changing your password does not sign you out anywhere. If you are signed in on another computer, that session continues.

Errors you may see

What happened	What you see
You left the name empty	"Please enter full name."
You left the current password empty	"Please enter current password."
The current password is too short	"Current password must be minimum 8 character."
The current password you typed is wrong	"Your current password is not correct."
You left the new password empty	"Please enter new password."
The new password is too short	"New password must be minimum 8 character."
The new password is missing a required kind of character	"Use at least 8 characters, including uppercase and lowercase letters, numbers, and symbols."
You left the confirmation empty	"Please enter confirm password."
The confirmation is too short	"Confirm password must be minimum 8 character."
The confirmation differs from the new password	"Your new password and confirm password must be same."

What only an administrator can change

- **Your email address**: despite how the box on "My Profile" looks.
- **Your role**: what you are allowed to do.
- **Your companies**: whose orders and invoices you see.
- **Closing your account.** Your screens have no control for this. Even an administrator cannot close their own account. The system refuses with "You cannot delete your own account.", so closing an account always takes a second person.

An administrator makes these changes on your account from **User Management → Users**.

FAQs

Why can I not type in the Email box on My Profile?

The box looks like one you could type in, but it is fixed. Clicking it does nothing, and nothing you do on that screen alters it. Only an administrator can change your email address.

Will changing my password sign me out on my other computer?

No. Changing your password does not sign you out anywhere; a session on another computer continues.

Can I change my own role or the companies on my account?

No. Your role and your companies are set by an administrator, from User Management then Users. You can only change your own name and password.

Can I close my own account?

No. Your screens have no control for this, and even an administrator cannot close their own account; the system refuses with "You cannot delete your own account.". Closing an account always takes a second person.

Are the rules for a password I set myself different from one an administrator sets?

No. The new password needs at least 8 characters, with an uppercase letter, a lowercase letter, a number, and a symbol, and these are the same rules an administrator follows. A password that works for one works for the other.

Related pages

- Signing in: what happens when a password stops working
- Finding your way around: where the menu under your name sits
- Adding and managing users: what administrators do on your account

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