

NolaPro

cloud accounting



Quick Start Guide

This manual assists you with the basics to get NolaPro up and running as quickly and productively as possible.

By NOGUSKA INC

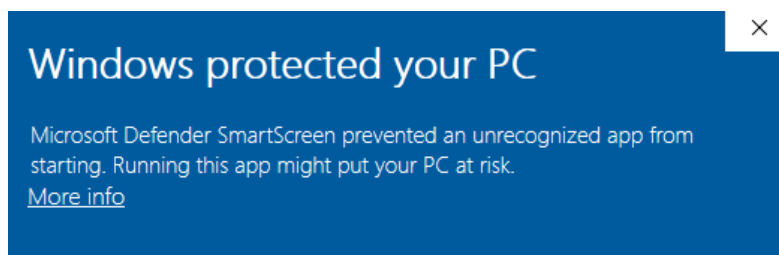
Quick Start Guide

Thank you for using NolaPro, the most flexible online accounting and business management solution available today!

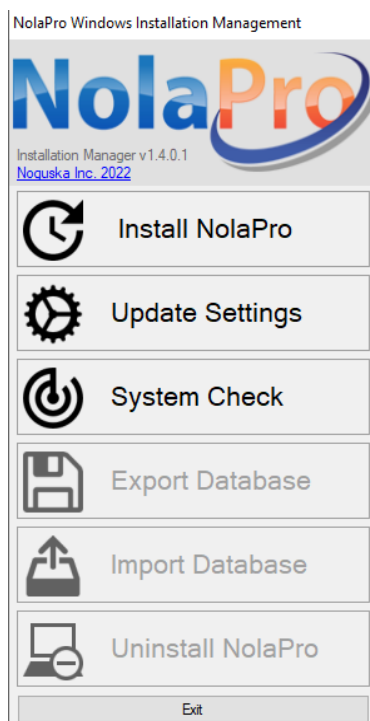
Whether using your own Windows or Linux system or our Cloud service, this guide will help get you up-and-running in just a few minutes.

Installing NolaPro on a *Windows*[®] operating system

Go to www.nolapro.com/downloads and click the Full Download button in Windows section. Double-click to open the NolaPro Windows Installer program. You may be presented with a Microsoft Defender message like this:

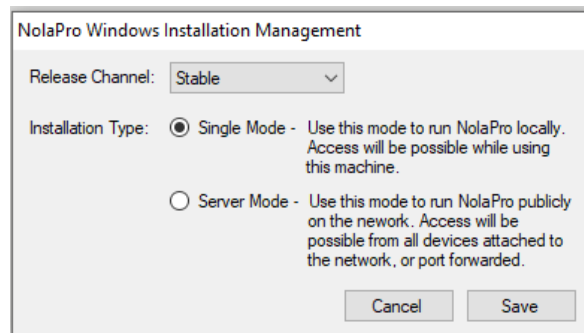


Click the More info text then the Run Anyway option. The installation management program looks like this:



The first option will be Install NolaPro if you do not have an existing installation, or Update NolaPro if you do have an existing installation. Export Database is useful to make a backup for safe storage should you have computer issues and need to restore it later.

Click Install NolaPro and follow the wizard to install in just a few minutes.



The Stable release channel is recommended. Select single or server installation type depending on if you would like to access NolaPro from other computers on your network. Click Save to continue.

If Windows asks for permission to allow the installation, just select ok, or “unblock” to allow it to install.

Upon completion your web browser should pop open with the NolaPro setup screen. If this fails to happen, simply double click NolaPro on your desktop or open your web browser and point it to <http://localhost:50080/>

Login with the following default credentials (we suggest then changing them):

Login: admin

Password: pass

This username/password combination will not be shown on future logins for security purposes.

Linux Installation

A detailed Linux installation guide using Ubuntu is located at:

<https://www.nolapro.com/LinuxSetup/>. The following are general instructions.

If you have installed NolaPro on your computer in the past, and it isn't necessary to retain your existing data, it's best to completely uninstall the program by recursively removing the directory (example: `rm -rf /var/www/html/nolapro`) and the database in MySQL (example: `mysql>drop database nolapro;`).

If you wish to retain your data, do **not** uninstall/reinstall but download an update instead: https://www.nolapro.com/downloads?type=linux_update

After uninstalling any old versions of NolaPro from your system, unzip (unzip `nolapro_release_php_XX.zip`) and/or copy the entire `nolapro` directory to a web-accessible folder (document root of your web server). Note that the Apache user must have write access to the `/nolapro` directory.

Bring up this directory in a web browser (usually `http://localhost/nolapro`, `http://localhost`, or `http://accounting.yoursite.com` if you use the `/nolapro` directory as the document root).

The web installer will display the system dependencies that are required in order to run NolaPro properly.

You may need to make modifications to your system so that NolaPro will operate on your machine. Remember to restart your web server if you make modifications to its configuration or to PHP (`php.ini`).

When all status flags are green, you can continue on with the installation process and load the database.

NolaPro should then finish its installation within a few minutes. Click the resulting link to access the login screen, which will provide you the credentials for the system:

Login: admin

Password: pass

This username/password combination will not be shown on future logins for security purposes.

❑ User Name

Your administrator will set you up with a user name and your user rights. Your name will appear at the top of each page welcoming you to the program.

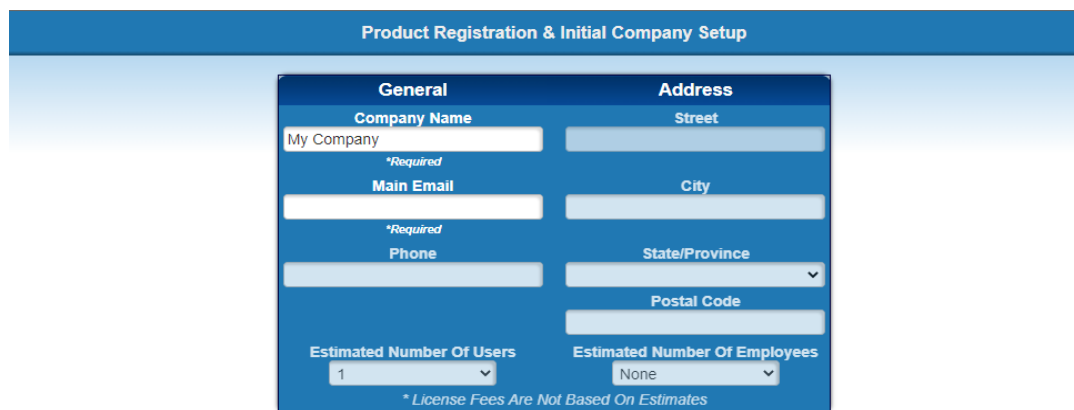
* If you are installing NolaPro and it is your first time logging in, use *admin* for your username and *pass* for your password.



❑ Initial Company Setup

After language selection, fill in the fields noting the following tips:

- Company name and email are required
- Email should be valid; will be on invoices, etc. sent to your clients
- If no state/province match, choose *none* (can edit these later)
- Click Install in the License Plan of your choice.

The image shows a 'Product Registration & Initial Company Setup' form. It is divided into two columns: 'General' and 'Address'. The 'General' column contains fields for 'Company Name' (with 'My Company' entered), 'Main Email' (marked as required), 'Phone', 'Estimated Number Of Users' (with '1' selected), and 'Estimated Number Of Employees' (with 'None' selected). The 'Address' column contains fields for 'Street', 'City', 'State/Province' (a dropdown menu), and 'Postal Code'. A note at the bottom states '* License Fees Are Not Based On Estimates'.

Select Monthly License Plan (Compare)

| Starter | Enterprise | Free |
|--|--|--|
| \$5.00 / User | \$10.00 / User | Single User Version |
| Payroll & Timeclock \$2.00 / Employee | Payroll & Timeclock \$2.00 / Employee | Single User Version Anytime Upgrade |
| Install | Install | Install |

Initial Login

When logging in for the first time you will be presented with the installation wizard which will guide you through setting up NolaPro. We recommend completing this so you don't miss any setup areas. You can close the wizard and access later from Tools -> System -> Setup Wizard.

The following are recommended setup areas highlighted in the setup wizard.

General Company Setup

1. View/Update your company details
 - a. Admin -> System -> Company New/Edit
 - i. Verify address and contact information
 - ii. VAT and language options
 - iii. Attach logos, if desired
2. Assign access rights to users
 - a. Admin -> System -> Users
 - i. Change the password for "admin" user (for security)
 - ii. Add other users (and set their rights) for access

Ledger

1. Enter the month your fiscal year starts
 - a. Admin -> Ledger -> Accounting Calendar
2. Review the Chart of Accounts
 - a. Print the Chart (Reports -> Ledger -> Chart of Accounts List)
 - i. By default, NolaPro installs a standard Chart of Accounts based on a Retail establishment

b. Confirm your Chart of Accounts

i. Ledger -> Accounts

OR

ii. Tools -> Import -> Import Accounts

Payables

1. Review the Setup screens (Admin -> Payables)

a. Vendor Terms

b. General Setup (Check/uncheck "Use today as transaction date")

c. Checking Accounts

2. Import your Vendors (Tools -> Import -> Import Vendors)

3. Add New Vendors (Expenses -> Vendors -> Add Vendor)

4. Enter Vendor Balances (Admin -> Payables -> Beginning Balance Bills)

Billing

1. Review the Setup screens (Admin -> Billing)
 - a. Sales Taxes
 - b. Invoice Terms
 - c. Sales Categories
 - d. General Setup
 - e. Company Options
 - f. Credit Card Options
2. Import your Customers (Tools -> Import -> Import Customers)
3. Add New Customers (Income -> Customers -> Add Customer)
4. Enter Customer Balances (Admin -> Billing -> Beginning Balances)

Inventory (optional)

1. Review the Setup screens (Admin-> Inventory)
 - a. Inventory Locations
 - b. Price Levels (**must assign/define at least one**)
 - c. Sales/Pricing Unit Name (each, pair, case, etc.)
 - d. Item Categories
 - e. General Setup
 - f. If using Shopping Cart, define Search Categories
2. Import your Inventory Items (Tools -> Import -> Import Inv Items)
3. Add New Inventory Items (Inventory -> Items -> New Item)
4. Enter Inventory Counts (Admin -> Inventory -> Item Beginning Balances)

Orders (optional)

1. Review the Setup screens (Admin -> Orders)
 - a. Service Types
 - b. Service Classes
 - c. Service Status Options
 - d. Service Labor Rates

Payroll (optional)

1. Create your Tax Tables (Admin -> Payroll -> Edit Tax Table)
2. Review the Setup screens (Admin -> Payroll)
 - a. Checking Accounts (can be the same account as in Payables)
 - b. General Setup
 - c. General Factors
 - d. Pay Types
 - e. General Benefits (Pay)
 - f. General Deductions
 - g. Pension Plans (and other deductions taken before taxes)
 - h. Company Contributions
3. Add Employees (Payroll -> Employees -> Add Employee)
4. If starting NolaPro mid-year:
 - a. Go to Payroll -> Calculations/Checks -> Edit Employee Check, enter the pay/deductions ALREADY PAID, one set of entries per employee, per quarter paid so far.
 - b. To make sure it was entered correctly, go to Reports -> Payroll -> Check Summary.

Additional Items

Excel Downloads



On many report you will see a MS Excel icon. Click this to export report info into Excel to easily analyze and manipulate your data.

Currency and Decimals

Admin -> Admin Setup -> System Settings

1. Set the **currency** decimal places you require.
2. Set the currency symbol you require.
3. Set the **unit** decimal places you require, and click Save.

NolaPro does have multi-currency capability.

Check Tools -> Add-Ons to get this advanced feature.

User Services

This is what sets NolaPro apart from the competition! While providing free and low-cost applications and support, we also serve all special requests at affordable rates including:

- NolaPro code customization
 - Integration with existing applications
 - Adding new features
 - Modification of existing features
 - Industry-specific changes
 - International compliance
- Live and email support services
- Onsite or remote training
- Systems analysis/consulting
- Accounting book auditing
- Data conversion & backups
- Private servers & full “turn-key” systems
- Installation and configuration
- Networking / technical tasks
- Windows-to-Linux migrations
- Hosting of your NolaPro clients

If you need a service not listed here, please contact us at support@nolapro.com and we'll be glad to discuss a unique solution crafted precisely for your needs.

Resources

| | |
|---------------|---|
| Website: | http://www.nolapro.com |
| Support Site: | http://support.nolapro.com |
| Demo Site: | http://demo.nolapro.com |
| Inquiries: | inquiry@noguska.com |
| Partnerships: | partners@noguska.com |

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