

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 LLC

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

If you have installed NolaPro on your computer in the past, and it isn't necessary to retain your existing data, the best route is to completely uninstall the program through the Windows Control Panel Add/Remove Programs option then reboot. If you wish to retain your data, do **not** uninstall/install the program again, but download a free update at www.nolapro.com (Downloads on menu) instead.

After uninstalling any old versions of NolaPro from your system, double-click and run the NolaPro download (NOLAPRO-AMP.exe) to start the installation.

Follow the Wizard to install in just a few minutes. 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 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.

Setup NolaPro for web access from anywhere if you wish by following the instructions at this link: http://www.nolapro.com/np_windows_internet.pdf

Linux Installation

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: <http://www.nolapro.com/download/?os=lu>

After uninstalling any old versions of NolaPro from your system, untar (`tar -zxvf nolapro.tgz`) 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 login and *pass* for your password.

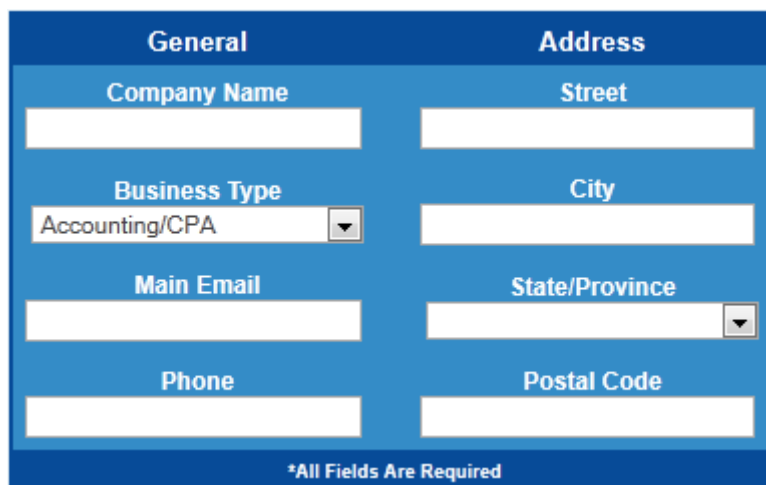


The image shows the NolaPro cloud accounting login interface. At the top is the NolaPro logo with the tagline 'cloud accounting'. Below the logo are two input fields: 'Username' with the text 'admin' and 'Password' with four dots. A 'Log In' button is positioned below the password field.

Initial Company Setup

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

- a. All fields are required
- b. Email should be valid; will be on invoices, etc. sent to your clients
- c. If no state/province match, choose *none* (can edit these later)



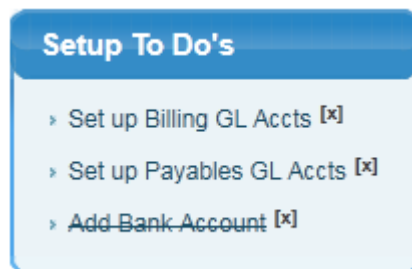
The image shows a form for 'Initial Company Setup' with two columns: 'General' and 'Address'. The 'General' column contains fields for 'Company Name', 'Business Type' (a dropdown menu with 'Accounting/CPA' selected), 'Main Email', and 'Phone'. The 'Address' column contains fields for 'Street', 'City', 'State/Province' (a dropdown menu), and 'Postal Code'. A footer note states '*All Fields Are Required'.

Setup To Do's Menu

In the upper left corner you should see a flashing *Setup To Do's* menu bar. Listed here are the minimal items you should configure prior to using NolaPro.



Click on the menu bar to open/close it, and click on any link name to configure that section. When finished, check the [x] box to mark it as done.



When all sections have been completed, this menu will not appear again except upon creating a new company will allow setup of separate options.

After completing this you are ready to use NolaPro! However we do strongly suggest to get the most out of the application that you continue below and configure additional areas for your business.

General Company Setup

1. View/Update your company details
 - a. Admin -> Admin Setup -> 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 -> Admin Setup -> User New/Edit
 - 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 -> Setup Ledger -> Set Fiscal Start Month
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 -> Chart of Accounts -> Edit GL Account
 - OR**
 - ii. Tools -> Imports -> Import Accounts

Payables

1. Review the Setup screens (Admin -> Setup-Payables)
 - a. Vendor Terms
 - b. General Setup (Check/uncheck “Use today as transaction date”)
 - c. Checking Accounts
2. Import your Vendors (Tools -> Imports -> Import Vendors)
3. Add New Vendors (Contacts -> Vendors -> New Vendor)
4. Enter Vendor Balances (Admin -> Setup-Payables -> Beginning Balance Bills)

Billing

1. Review the Setup screens (Admin -> Setup-Receivables)
 - a. Sales Taxes
 - b. Invoice Terms
 - c. Sales Categories
 - d. General Setup
 - e. Company Options (click footer Help icon for more info)
 - f. Credit Card Options
2. Import your Customers (Tools -> Imports -> Import Customers)
3. Add New Customers (Contacts -> Customers -> New Customer)
4. Enter Customer Balances (Admin -> Setup-Receivables -> Beginning Balances)

Inventory (optional)

1. Review the Setup screens (Admin->Setup-Inventory)
 - a. Plant Location
 - 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 -> Imports -> Import Inv Items)
3. Add New Inventory Items (Inventory -> Inventory Items -> New Item)
4. Enter Inventory Counts (Admin -> Setup-Inventory -> Item Beginning Balances)

Orders (optional)

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

Payroll (optional)

1. Create your Tax Tables (Payroll -> Tax Tables)
2. Review the Setup screens (Admin -> Setup-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 (Contacts -> Employees -> New 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
Video Library:	http://nolapro.com/training
Demo Site:	http://demo.nolapro.com
Add-Ons:	http://extras.nolapro.com
Inquiries:	inquiry@noguska.com
Partnerships:	partners@noguska.com

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