

# Quick Start Guide

Welcome to FirstBIT ERP!

Now, you need to enter the data required for its operation. Use the hyperlinks to refer to the User Guide's specific topics for more information.

## 1. Turn on the features you need and specify the options

Decide which functionality you need. Some of the features (Production or Payroll) are not available until you turn them on. The settings are system-wide, that is, if your company consists of multiple entities, the settings will be applicable to all the entities. It is not recommended that you turn on the features that will not be used—there will be additional required fields, which the users will have to fill in.

Select the accounting currency and the currency for reporting the taxes (national currency). Initially, the following three currencies are available in the system: *Dirham UAE*, *US Dollar*, and *Euro*. If your company has transactions in other currencies, add those currencies.

**Where:** Administration > Settings

**How:** [1.4. Configuration Settings](#)

## 2. Enter general information about your company

At this moment, there is a single default company in the program database—"OUR Company". Replace this default name with the name of your company. Type a name, legal address and specify the default cash and bank accounts which can be created on the fly. If the company includes multiple legal entities, you can add them, however, the first entity will be used as the default entity for operations.

**Where:** Accounting > Master Data > Entities

**How:** [2.1.1. Adding an Entity](#)

## 3. Review the chart of accounts

A chart of accounts is a basis for accounting in the system. The system provides you with a default chart of accounts; however, you can edit the chart by adding the accounts that you need and removing the accounts that you don't need. Check the default GL accounts assigned to different objects of accounting. It should be done before you start recording the company transactions in the system.

**Where:** Accounting > See also > General Chart of Accounts

**How:** [7.1.1. Adjusting the Chart of Accounts](#)

## 4. Add the companies

Add the companies, that are your suppliers and add the companies that are your customers. Enter the company addresses, bank accounts, and contact information. For each company, specify the VAT-related information.

**Where:** Sales > Master Data > Companies or Purchasing > Master Data > Companies

**How:** [2.15.1. Adding a Company](#)

## 5. Specify the business activities

If your company is selling miscellaneous goods and providing services, you may need to be able to evaluate the profitability of each of the business activities. By default, there are the following business activities on the list: *Main Activity* and *Other*. You can edit the default activities and add any new ones.

**Where:** Accounting > Master Data > Business Activities

**How:** [2.2.1. Adding a Business Activity](#)

## 6. Add the departments and employees

There are two departments in the database at this stage: *Main* and *Other*. Rename them if needed and add other departments. Add your company's employees, for each specify the entity and department.

**Where:** Accounting > Master Data > Departments or HR & Payroll > Master Data > Departments

**How:** [2.3.1. Adding a Department](#)

**Where:** Accounting > Master Data > Employees or HR & Payroll > Master Data > Employees

**How:** [2.21.1. Adding an Employee](#)

## 7. Add the warehouses

If your company has multiple warehouses, in addition to the default (*Main*) warehouse, create other warehouses.

**Where:** Warehouses > Master Data > Warehouses

**How:** [2.10.1. Adding a Warehouse](#)

## 8. Add UOMs and items

If you need to use specific UOMs for specific items, add appropriate UOMs to the system. Then, add the master records for inventory items that your company sells and purchases and specify the default UOMs for the items. Specify a warehouse where each item will be stocked and the default supplier company. Add the services.

**Where:** Purchasing > See also > UOMs

**How:** [2.11. UOMs](#)

**Where:** Sales > Master Data > Items or Purchasing > Master Data > Items

**How:** [2.19.1 Adding an Item](#)

## 9. Specify the expense, income, and cash flow items (optional)

There are just a few default expense, income, and cash flow items in the system database. These items can be used for income and expense analytics and for cash flow analysis. Edit the available items and add any new items if needed.

**Where:** Accounting > Master Data > Expense Items

**How:** [2.8.1. Adding an Expense Item](#)

**Where:** Cash Management > Master Data > Cash Flow Items

**How:** [2.7.1. Adding a Cash Flow Item](#)

**Where:** Accounting > Master Data > Income Items

**How:** [2.9.1. Adding an Income Item](#)

## 10. Enter the opening balances

To start accounting from a specific month (accounting period), you need to enter into the system information about your company's assets and liabilities available just before the start of this month.

**Where:** Accounting > See also > Opening Balances

**How:** [7.4. Opening Balances Entering](#)

## The system is ready for operation.

Enjoy your work!

If you still have questions or want to request the demonstration of the product, contact us at [hotline@firstbit.ae](mailto:hotline@firstbit.ae).

