
Koalix ERP

Release 0.2

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Koalix ERP - Beautiful ERP for small business

Warning: This project is currently in alpha phase and not recommended for productive use!

Koalix ERP provides following benefits:

- **Clear and beautiful user interface:**

Koalix ERP provides an beautiful and easy to use graphical user interface with a lot of nice features

- **Easily create your own templates for PDF export:**

You can easily create your own templates since it's just HTML

- **Excellent workflow:**

All important features just one click away

- **User management:**

Create and manage user accounts, groups and permissions

- **Fully integrated CMS:**

You can add wikis, blogs, galleries, ...

- **Ready for webshop:**

You want to start a webshop? Integrate easily in KoalixCRM

- **Multiple translations:**

Currently available translations:

- English
- German

Upcoming translations:

- Spanish
- Italian
- French

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1.1 Screenshots

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1.1.1 Create Customer

The screenshot shows the 'Create customer' form in the Koalix CRM interface. The form is organized into several sections:

- Name:** Fields for 'Name' and 'Prenom'.
- Phone Address:** Fields for 'Phone Number' and a dropdown for 'Private'.
- Email Address:** Fields for 'Email Address' and a dropdown for 'Private'.
- Postal Address:** A dropdown menu for 'Postal Address' followed by fields for 'Addressline 1', 'Addressline 2', 'Zipcode', 'City', and 'State'.
- Contact Address:** A dropdown menu for 'Contact Address'.

At the bottom of the form, there are 'Save' and 'Cancel' buttons. The interface includes a sidebar with navigation options like 'Administration', 'Logout', 'Dashboard', 'Customers', 'Suppliers', 'Products', 'Order Management', and 'Settings'. The top header shows 'Koalix CRM' and a search bar.

1.1.2 Basic Settings

The screenshot shows the 'Create tax rate' form in the Koalix CRM interface. The form includes the following fields:

- Taxrate in Percentage:** A text input field.
- Taxname:** A text input field.
- Active Account:** A dropdown menu.
- Passiva Account:** A dropdown menu.

At the bottom of the form, there are 'Save' and 'Cancel' buttons. The interface includes a sidebar with navigation options like 'Login', 'Dashboard', 'Customers', 'Suppliers', 'Products', 'Order Management', and 'Settings'. The top header shows 'Koalix CRM' and a search bar.

1.1.3 Product Overview

> Products +

Prefix	Title	Description	Price	Unit	Item Tax	
#6	Ölwechsel	Bla	–	min	8% Mehrwertsteuer	🔍 ✎ 🗑️
#2	Reifenwechsel	–	–	h	8% Mehrwertsteuer	🔍 ✎ 🗑️
S_1	Bla	–	–	min	8% Mehrwertsteuer	🔍 ✎ 🗑️
#125	Первый заказ	Первый заказ	–	Stk	8% Mehrwertsteuer	🔍 ✎ 🗑️
#128	Первый заказ	Первый заказ	–	min	8% Mehrwertsteuer	🔍 ✎ 🗑️

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Note: This version is not recommended for production use. Therefore production installation is not yet mentioned in this documentation.

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1.2.1 By platform

Pango, GdkPixbuf, and cairo can not be installed with pip and need to be installed from your platform's packages. lxml and CFFI can, but you'd still need their own dependencies. This section lists system packages for lxml or CFFI when available, the dependencies otherwise. lxml needs *libxml2* and *libxslt*, CFFI needs *libffi*. On Debian, the package names with development files are *libxml2-dev*, *libxslt1-dev* and *libffi-dev*.

Debian / Ubuntu

Debian 7.0 Wheezy or newer, Ubuntu 11.10 Oneiric or newer:

```
sudo apt-get install python-dev python-pip python-lxml libcairo2 libpango1.0-0 libgdk-pixbuf2.0-0 lib
```

Debian 6.0 Squeeze, Ubuntu 10.04 Lucid: GDK-PixBuf is part of GTK+, which also depends on cairo and Pango.

```
sudo apt-get install python-dev python-pip python-lxml libgtk2.0-0 libffi-dev
```

Fedora

```
sudo yum install python-devel python-pip python-lxml cairo pango gdk-pixbuf2 libffi-devel
```

Archlinux

```
sudo pacman -S python-pip python-lxml cairo pango gdk-pixbuf2
```

Gentoo

```
emerge weasyprint
```

Mac OS X

With Macports

```
sudo port install py27-pip py27-lxml cairo pango gdk-pixbuf2 libffi
```

With Homebrew:

```
brew install python cairo pango gdk-pixbuf libxml2 libxslt libffi
```

Windows

- Get CPython 2.7 from python.org,
- [Christopher Gohlke's unofficial binaries](#) for CFFI and lxml,
- and [Alexander Shaduri's GTK+ installer](#). Make sure that *Set up PATH environment variable* checked.

Common Package Requirements

Following requirements are common for both, development and demo installation of Koalix ERP.

Please install the following packages:

- Python 2.7 (other versions currently not working, sorry)
- Django 1.7
- Mezzanine>=3.1.10
- po-localization
- django-bootstrap3
- django-braces
- django-import-export
- django-fsm
- django-extra-views

Caution: Do not use a Django version below 1.7! It will not work.

Tip: If you have installed pip you can just use `pip install -r requirements.txt`

Setting up the demo

1. Download the source
2. Extract to a folder of your choice
3. Open console and change to that folder
4. Execute `python manage.py createdb`
5. Create an superuser when you're asked for

6. Execute `python manage.py collectstatic`
7. Execute `python manage.py runserver`
8. Open your browser and go to <http://127.0.0.1:8000>
9. Login with the username and password you created at step #4

Hint: You can use the superuser to browse the CMS backend at <http://127.0.0.1:8000/admin/>

Note: If you're using an non-admin user you should assign permissions and groups

Install the initial data

To install the initial user groups do the following:

1. Open console and change to project folder
2. Execute `python manage.py loaddata auth_groups`

Setting up for development

You first need to install some more packages

Optional dev apps:

- `django-debug-toolbar`
- `django-extensions`
- `django-compressor`

For documentation:

- `Sphinx`
- `sphinx-rtd-theme`

Tip: If you have installed pip you can just use `pip install -r dev-requirements.txt`

GIT clone from: <https://github.com/tfroehlich82/koalixcrm.git>

Indices and tables

- `genindex`
- `modindex`
- `search`