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Made in Colombia

Introduction

A Client or tenant is the ERP term to define your company private data inside the ERP server. In an ERP server(environment) you can manage many tenants/clients at the same time, but each of them will have privacy, security and independent user/role management following international best practices of auditing, security and infrastructure management.

Then for small businesses a server can manage many clients/tenants (locally, in the cloud of with containers), but If your business is big, you might prefer to have a unique client with a lot of branches (organizations) and perhaps clusters of servers in your private cloud/data center,, these complete configurations are not in the scope of this manual, but they are completely possible.

Requirement: In order to create new tenants/clients you need

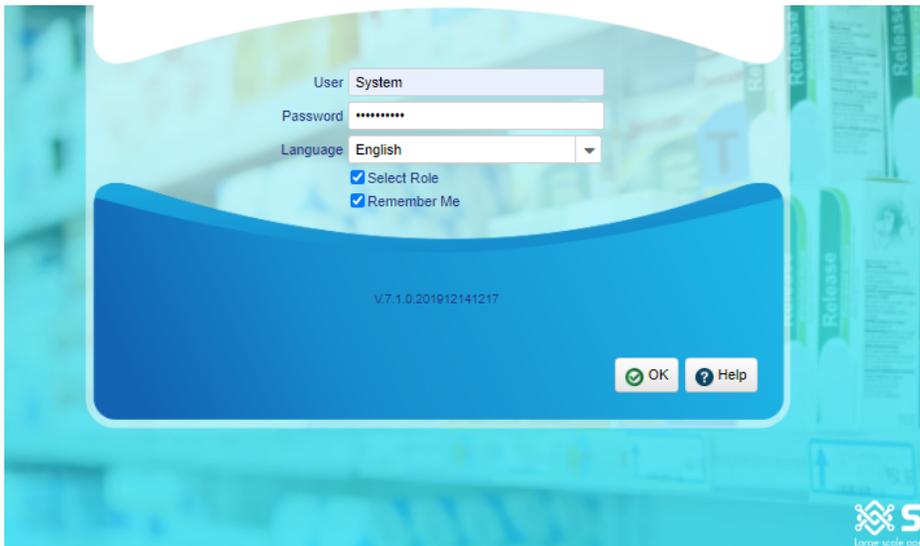
#1 A functional Idempiere environment (it could be in the cloud, container (podman or docker) or locally installed) for the setup/installation process we suggest to check the community doc: https://wiki.idempiere.org/en/Installing_iDempiere

#2 Access to the master system password of your idempiere instance : usually the System or Superuser, please contact your technical support or check your documentation to get that handy.

1. Client/Tenant Creation

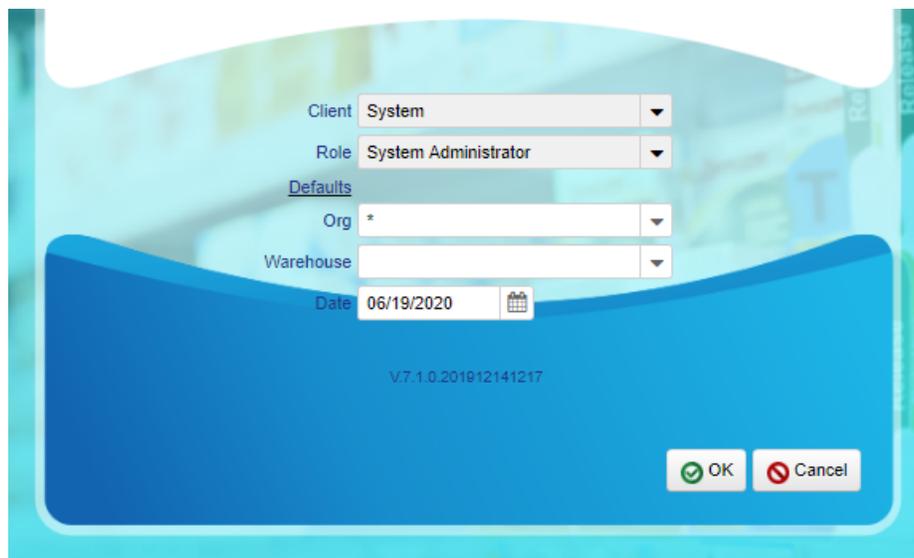
During the flow of this manual a new client called: Pharmacy test is created located in the United States, New York City. Currency: USD

Login as a System User



A login dialog box with a blue background. It contains the following fields and options:

- User: System
- Password: [masked]
- Language: English
- Select Role
- Remember Me
- Version: V.7.1.0.201912141217
- Buttons: OK, Help

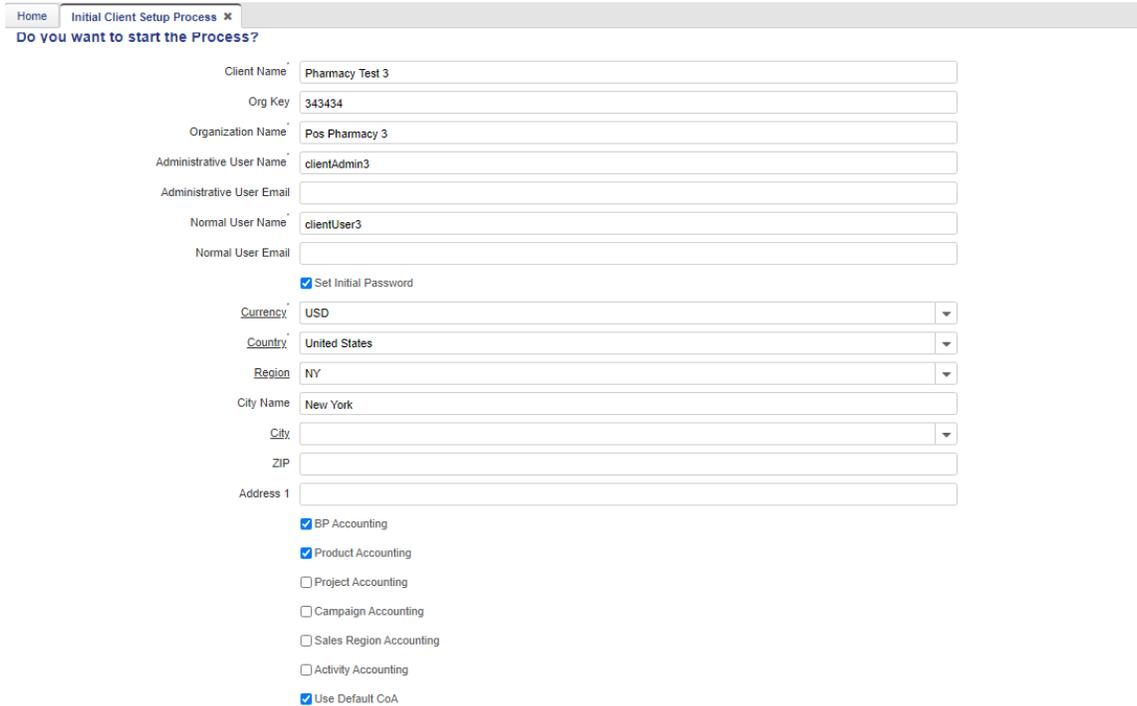


A client creation dialog box with a blue background. It contains the following fields and options:

- Client: System
- Role: System Administrator
- Defaults section:
 - Org: *
 - Warehouse: [empty]
 - Date: 06/19/2020
- Version: V.7.1.0.201912141217
- Buttons: OK, Cancel

System Admin – Client Rules – Initial Client Setup Process

Process to create client



Home Initial Client Setup Process ✕

Do you want to start the Process?

Client Name

Org Key

Organization Name

Administrative User Name

Administrative User Email

Normal User Name

Normal User Email

Set Initial Password

Currency

Country

Region

City Name

City

ZIP

Address 1

BP Accounting

Product Accounting

Project Accounting

Campaign Accounting

Sales Region Accounting

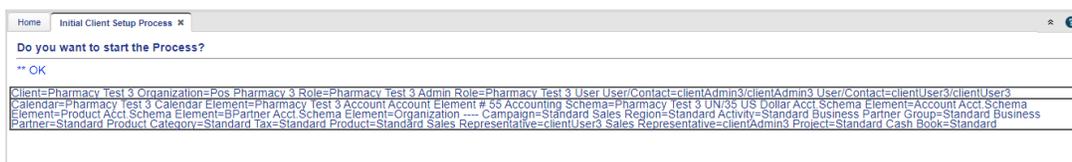
Activity Accounting

Use Default CoA

For this case a Default Chart of Accounts (CoA) is used , later on it will be loaded.

With the Set Initial Password checkbox activated , the initial password for those users will be the same username specified.

**Remember to not use spaces or symbols in the user names , instead use cyclecase by alternating capitalization*



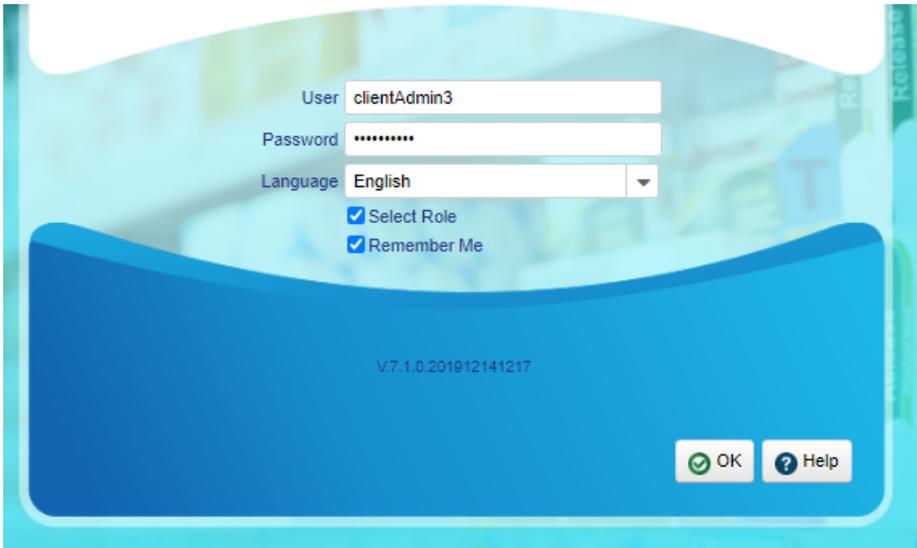
Home Initial Client Setup Process ✕

Do you want to start the Process?

** OK

Client=Pharmacy Test 3 Organization=Pos Pharmacy 3 Role=Pharmacy Test 3 Admin Role=Pharmacy Test 3 User User/Contact=clientAdmin3/clientAdmin3 User/Contact=clientUser3/clientUser3
 Calendar=Pharmacy Test 3 Calendar Element=Pharmacy Test 3 Account Account Element # 55 Accounting Schema=Pharmacy Test 3 UN/35 US Dollar Acct Schema Element=Account Acct Schema
 Element=Product Acct Schema Element=BP Partner Acct Schema Element=Organization --- Campaign=Standard Sales Region=Standard Activity=Standard Business Partner Group=Standard Business
 Partner=Standard Product Category=Standard Tax=Standard Product=Standard Sales Representative=clientUser3 Sales Representative=clientAdmin3 Project=Standard Cash Book=Standard

Logout of the ERP and login with client Administrative Username you typed in the above screen.



User

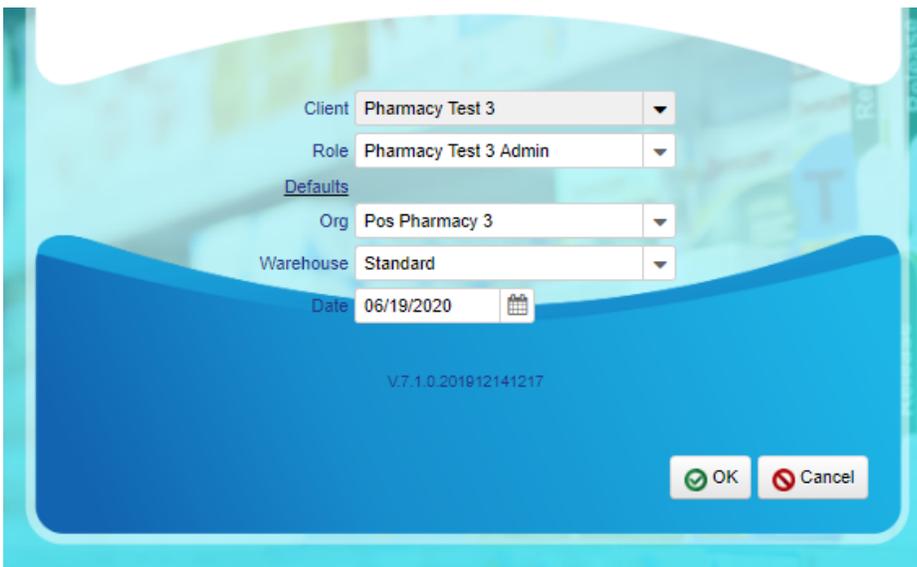
Password

Language ▼

Select Role

Remember Me

V.7.1.0.201912141217



Client ▼

Role ▼

Defaults

Org ▼

Warehouse ▼

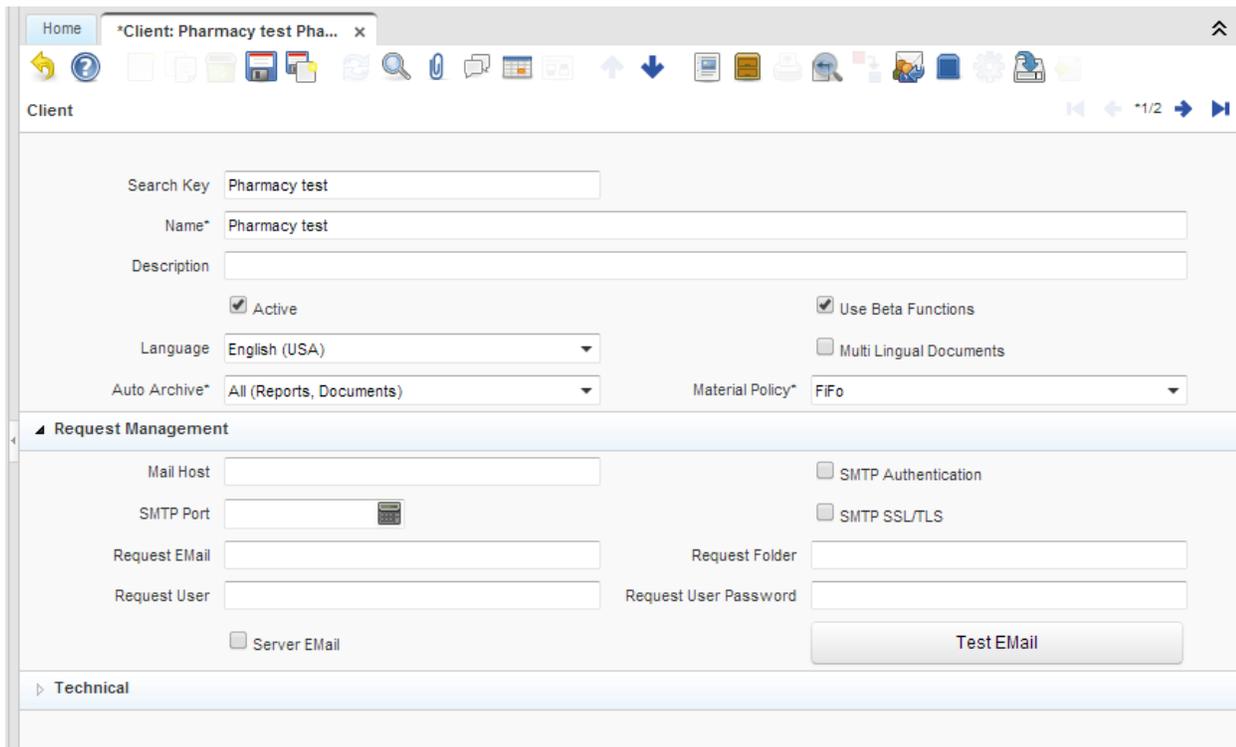
Date

V.7.1.0.201912141217

2. Client/Tenant Configuration

System Admin – Client Rule - Client

You can also include additional information here



The screenshot shows the 'Client' configuration page in the SmartJSP system. The page is titled 'Client' and contains several sections for configuration:

- Search Key:** Pharmacy test
- Name:** Pharmacy test
- Description:** (empty)
- Active:**
- Use Beta Functions:**
- Multi Lingual Documents:**
- Language:** English (USA)
- Auto Archive:** All (Reports, Documents)
- Material Policy:** Fifo

Request Management

- Mail Host:** (empty)
- SMTP Port:** (empty)
- Request EMail:** (empty)
- Request User:** (empty)
- Request Folder:** (empty)
- Request User Password:** (empty)
- SMTP Authentication:**
- SMTP SSL/TLS:**
- Server EMail:**
- Test EMail:** (button)

Technical

Index: <http://www.smartjsp.com/web/en/idempiereFirstSteps>