

Introduction

Welcome to SaltOS, its free solution that integrates Management CRM functionalities (management customer relationship) and ERP (Enterprise Resource Planning).

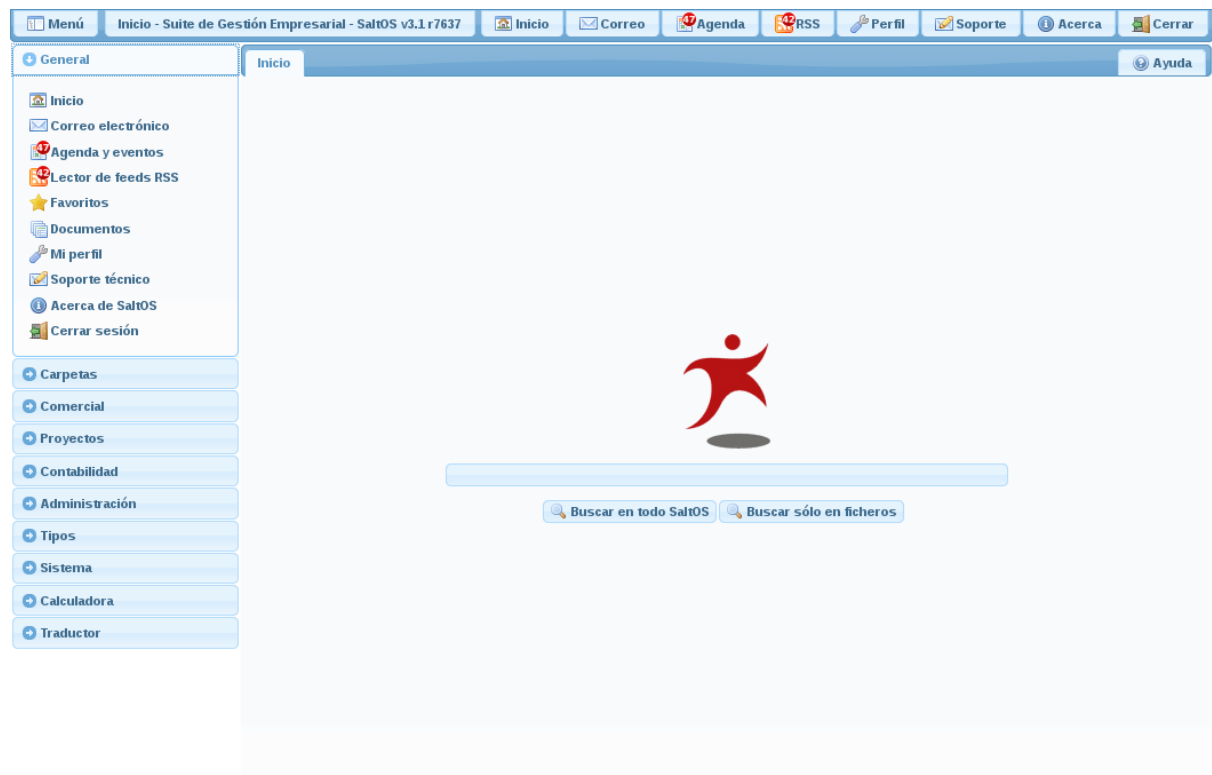
SaltOS will allow you to organize and keep all information concerning the management of your company, as customers, contacts, projects, budgets, invoices and more. It also offers the ability to manage your email, contacts and favorite RSS Feeds.

You will see that SaltOS interface is intuitive and easy to use, allowing you to work efficiently and comfortably.

Welcome to the Community of SaltOS!

General overview

SaltOS consists of a series of applications or modules. Each application provides specific functionality within the following categories:



- General Features
 - **Home or Dashboard**, Go to the main screen of the application.
 - **Correo electrónico** Read and send mail from here to their customers and suppliers.
 - **Agenda de eventos**, Enter on the agenda all visits and meetings.
 - **Gestor de documentos**, Has grouped all documentation of your company.
 - **Lector de feeds RSS** Follow your RSS and Atom feeds from this application.
 - **Favoritos**, Manage your favorites from here.

- **Textos predefinidos** Create presets for use in other applications texts.
- **Mi perfil**, Change your user preferences.
- **Soporte técnico** Contact technical support.
- **Acerca del proyecto SaltOS**, Know the credits formats supported by the internal viewer, licensing and other projects included in SaltOS. Also you can play Legend of The Bouncing Beholder [+](#), Winner of the 2010 competition JS1k [+](#) (The JavaScript code golfing competition).
- User folders
- Business Management
 - **Campañas comerciales**, Click marketing campaigns with follow.
 - **Posibles clientes**, Control potential customers may have.
 - **Presupuestos**, Make budgets quickly and easily.
 - **Actas de reuniones** Save a record when making meetings more control.
 - **Clientes**, Manage customers of your company.
 - **Contactos**, Go to the contacts of a client.
- Project management
 - **Proyectos** Follow your projects with this application.
 - **Seguimiento de tareas**, Monitor project tasks with follow-ups.
 - **Partes de trabajo** Of high all work performed using parts of an hour.
 - **Actas de reuniones** Save a record when making meetings more control.
 - **Incidencias**, Managed from here incidences customers
- Accounting
 - **Facturas**, Manage all invoices (invoices, fees, etc ...)
 - **Facturas periódicas**, Schedule recurring bills with maturity dates.
 - **Proveedores**, Manage your company's suppliers.
 - **Gastos**, Control costs and know if they are liquidated.

To manage the configuration of SaltOS itself there are several applications:

- Administration
 - **Productos**, Set here to sell their products
 - **Empleados** Of high, low or modify employees.
 - **Usuarios** Of high, low or modify users.
 - **Grupos** Create working groups to users.
- Type
 - **Cuentas**
 - **Epígrafes**, Define sections for bills and expenses.
 - **Estados**, Define the possible states of an event, project, etc ...
 - **Formas de pago**, Define payment methods to manage expenses.
 - **Prioridades**, Define priorities for phonebook entries.
 - **Tipos de eventos**, Define the event types you need.
- System
 - **Importaciones**
 - **Configuración**, Change global application preferences
 - **Base de datos** Perform backups and restore them easily.

Interface

The graph SaltOS interface is divided into 3 sections:

- **Central Area:** it will find the selected application with the help tab.



- **Top bar:** in it you will find the button to hide the menu, the link about and the current version of SaltOS, control voice reader (if enabled) and the speed buttons to access different applications.



- **Left side menu:** from here you can access different applications SaltOS. You can hide this menu to expand the available space on the screen.



Central Area

In **central space** lists and forms for various applications are displayed. For easier viewing, the information is grouped in **flaps** or **tabs**. Eg 'Client List', 'Filter options', 'Graphs and Statistics', right flap is helpful. You can access different tabs by clicking on the name of each one on top of the central space.

Listings

Listado de clientes

Opciones de filtro

Nuevo cliente

Buscar

Buscar

Reset

<input type="checkbox"/>	Cód.	C.I.F.	Nombre	Fijo	Móvil	Email	WC	HF						
<input type="checkbox"/>	00100	52194421-G	a felis ullamcorper viverra. Maecenas iaculis aliquet	90 839 49 91	669 443 578	ac.mattis@Phaselluslibero.com	1	1						
<input type="checkbox"/>	00099	20119401-Z	orci tincidunt adipiscing. Mauris molestie	90 966 32 33	667 850 963	id@lectusrutrum.ca	0	0						
<input type="checkbox"/>	00098	52424359-Z	placerat velit. Quisque varius. Nam porttitor	92 030 99 39	615 352 537	mi.Duis@Quisque.ca	0	0						
<input type="checkbox"/>	00097	41041718-E	interdum enim non nisi. Aenean	96 944 71 92	655 125 417	amet@consecteturadipiscing.ca	0	0						
<input type="checkbox"/>	00096	24792585-E	Nunc ac sem ut dolor dapibus gravida. Aliquam tincidunt,	93 437 90 67	664 800 279	lorem.eget.mollis@temporerat.edu	0	0						
<input type="checkbox"/>	00095	21427526-C	Etiam liqua tortor. dictum eu,	90 497 67 78	626 267 504	a.dui.Cras@neque.edu	0	0						
<input type="checkbox"/>	00094	14906715-S	turpis vitae purus gravida sagittis. Duis gravida. Praesent eu	97 627 95 09	685 420 422	dignissim@sed.org	0	0						
<input type="checkbox"/>	00093	95371913-H	rutrum magna. Cras convallis convallis dolor. Quisque	96 355 81 71	680 318 357	sagittis lobortis mauris@Nullaeggetmetus.com	0	0						
<input type="checkbox"/>	00092	15815471-P	tellus. Aenean egestas hendrerit neque. In ornare sagittis felis.	94 391 86 64	623 178 520	nec@egetmollis.ca	0	0						
<input type="checkbox"/>	00091	63876899-W	erat. Etiam vestibulum massa rutrum magna. Cras convallis	98 568 90 65	651 389 872	Integer.vitae@ascelerisquesed.com	0	0						
<input type="checkbox"/>	00090	43207883-X	aliquam adipiscing lacus. Ut nec	99 717 13 02	639 857 187	sit@elitfermentum.com	0	0						
<input type="checkbox"/>	00089	43053918-W	Nulla dignissim. Maecenas ornare egestas liqua. Nullam feugiat	94 990 64 58	650 732 789	ornare.sagittis.felis@arcuacorci.com	0	0						
<input type="checkbox"/>	00088	30895624-X	malesuada vel. convallis in. cursus et. eros. Proin ultrices. Duis	96 693 00 86	659 412 381	ipsum.Phasellus.vitae@velitegestasiacinia.ca	0	0						
<input type="checkbox"/>	00087	16188119-A	Lorem ipsum dolor sit amet. consectetur adipiscing elit.	97 206 55 72	692 706 825	elit.pellentesque.a@sed.com	0	0						
<input type="checkbox"/>	00086	84704018-D	facilisis. magna tellus faucibus leo. in lobortis tellus justo	92 714 62 03	608 532 073	netus@tellus.edu	0	0						
<input type="checkbox"/>	00085	04839626-G	magna. Phasellus dolor elit. pellentesque a. facilisis non. bibendum	94 882 29 20	631 405 259	Duis.elementum@nec.edu	0	0						
<input type="checkbox"/>	00084	53805372-E	lorem. sit amet ultrices sem magna	94 861 25 79	676 005 929	sem.semper@magnaNam.com	0	0						
<input type="checkbox"/>	00083	19412349-V	magna. Phasellus dolor elit. pellentesque a.	92 271 42 57	668 993 435	Vivamus@tincidunt.org	0	0						
<input type="checkbox"/>	00082	78791841-O	massa. Quisque porttitor eros nec tellus.	97 576 02 83	674 708 463	molestie.arcu@lectus.edu	0	0						
<input type="checkbox"/>	00081	73206405-L	in. cursus et. eros. Proin ultrices. Duis volutpat nunc sit	95 246 12 15	696 322 492	nonummy@erat.ca	0	0						
<input type="checkbox"/>	00080	80274925-V	morbi tristique senectus et netus et malesuada fames ac	97 930 22 19	690 266 772	egestas.liqua@eget.edu	0	0						
<input type="checkbox"/>	00079	00589239-Y	sed pede. Cum sociis natoque	92 308 93 64	618 496 158	sit@justoPraesent.org	0	0						
<input type="checkbox"/>	00078	25175905-N	accumsan sed. facilisis vitae. orci. Phasellus dapibus	96 132 79 75	696 472 144	liqua@iaculis.org	0	0						
<input type="checkbox"/>	00077	51153926-N	tempus eu. liqua. Aenean euismod mauris eu	92 190 40 72	605 326 233	blandit.Nam@parturientmontes.edu	0	0						
<input type="checkbox"/>	00076	28729287-R	Duis elementum. dui quis accumsan convallis.	91 868 92 86	625 203 791	purus.Nullam.scelerisque@Donec.ca	0	0						

Página 1 de 4 (registros del 1 al 25 de 100). Registros por página:

25

</

Página 1 de 4 (registros del 1 al 25 de 100). Registros por página: 25

In the first list with data from each application is displayed. At the top of the list find the meaning of each column and the possibility of computer listing according to its value. Sorting can be done in ascending or descending order by clicking the arrows available in each column.

In the first column of each listing find an element of type *checkbox* in order to select all records in a single click. You will also find this item in each record listed to select them individually. These controls will apply functions to massively in or selected records, deleting records or liquidate working parts.

In the last column of each record are buttons to perform actions on the recording in question:

- View or consult
- Edit.
- Copy.
- Export in PDF format. [más info sobre PDF](#)
- Show record in the internal viewer.
- Clear.





Depending on each application provides additional functionality such as:

- Export in vCard format. [más info sobre VCARD](#)
- Display QRCode with log data. [más info sobre QRCode](#)
- Send registration email.

In certain applications will find **additional information** at the bottom of the list, for example, in the application of invoices will find a summary of the amount of the invoice displayed.

On top of the list is the **Quick search** shaped box. Please enter search term and click the 'Search' button to start the search. After filtering the content of the current list you can regain all records by clicking the 'Reset' button.

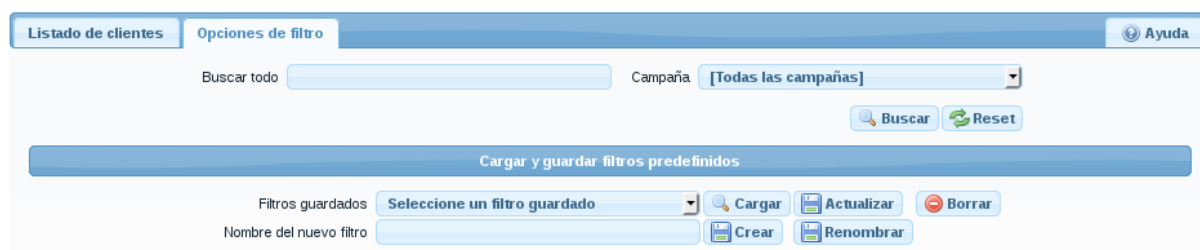
Depending on the application you will find other buttons:

-  Export to Excel
-  Export as PDF
-  Send PDF
-  Settle
- etc.

To **create a new record** in the current application, for example an invoice, a customer, etc; you must click on the button located to the left of the listing.

At bottom right is a selector to set the number of records displayed on the same screen (50, 100, 150, etc.). On the right side are the controls for **navigate** to the next page of listing as a selector for **direct access to a page**.

Filter Options



The screenshot shows a web application interface with a blue header bar. On the left, there are two tabs: 'Listado de clientes' and 'Opciones de filtro', with the latter being active. On the right of the header is an 'Ayuda' button. Below the header, there is a search section with a text input labeled 'Buscar todo', a dropdown menu labeled 'Campana' with the selected option '[Todas las campañas]', and two buttons: 'Buscar' and 'Reset'. Below this is a blue bar with the text 'Cargar y guardar filtros predefinidos'. Underneath, there is a section for 'Filtros guardados' with a dropdown menu labeled 'Seleccione un filtro guardado'. To the right of this dropdown are three buttons: 'Cargar', 'Actualizar', and 'Borrar'. Below the dropdown menu is a text input labeled 'Nombre del nuevo filtro'. To the right of this input are two buttons: 'Crear' and 'Renombrar'.

Most applications have a search engine to filter the list of registration under the criteria of the user. Find a simple search on the application list, as described in the previous section. In the 'Filter options' tab you will find a **advanced search** it will allow you refine your search based on the information fields of application.

At the bottom of the flange of the possibility of searching **save your search parameters** to recover comfortably future searches.

To **create a filter** Select and enter the search criteria in the paragraph above, give it a name in the box 'Name the new filter' and click the 'Create' button.

To **removing a filter** defined, select it from the drop-down and click on 'Upload'. You will see the search form will retrieve the options defined, to search click 'Search'. If you want **updating a filter**, Charge it and modify the parameters defined. When finished click 'Update'. If you want **delete** a defined filter click 'Delete'.