

## Introduction

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

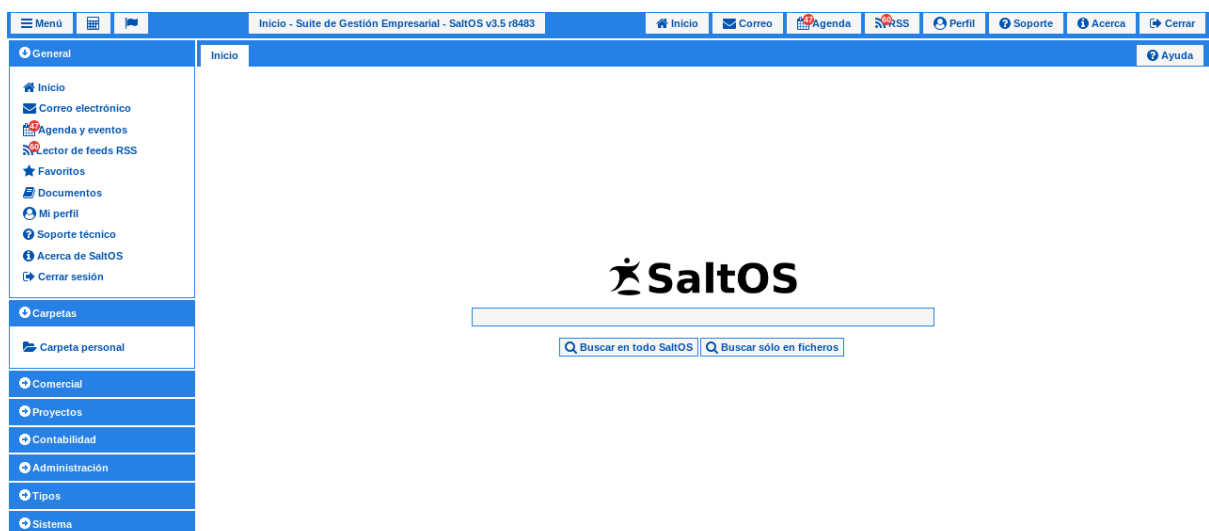
SaltOS will allow you to organize and keep all information concerning the management of your company, as customers, contacts, projects, budgets, invoices and more. It also offers the ability to manage your email, contacts and favorite RSS Feeds.

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.
  - **Configuración**, Change global application preferences
- 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.

## Interface

The graph SaltOS interface is divided into 3 sections:

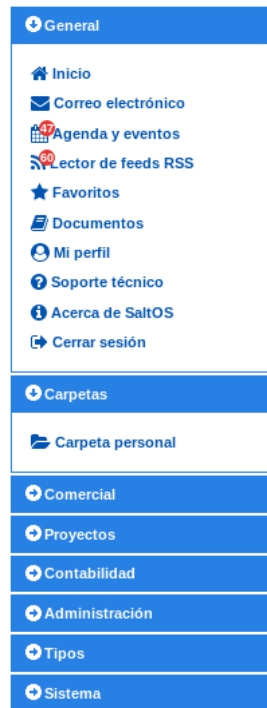
- **Central Area:** it will find the selected application with the help tab.



- **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.



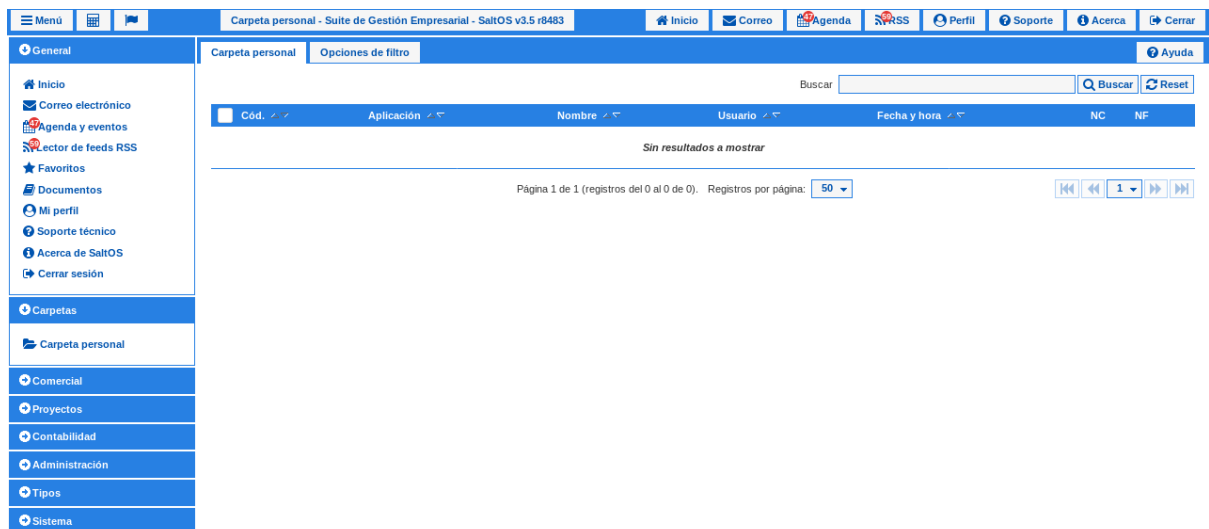
- **Left side menu:** from here you can access different applications SaltOS. You can hide this menu to expand the available space on the screen.



## 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



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.

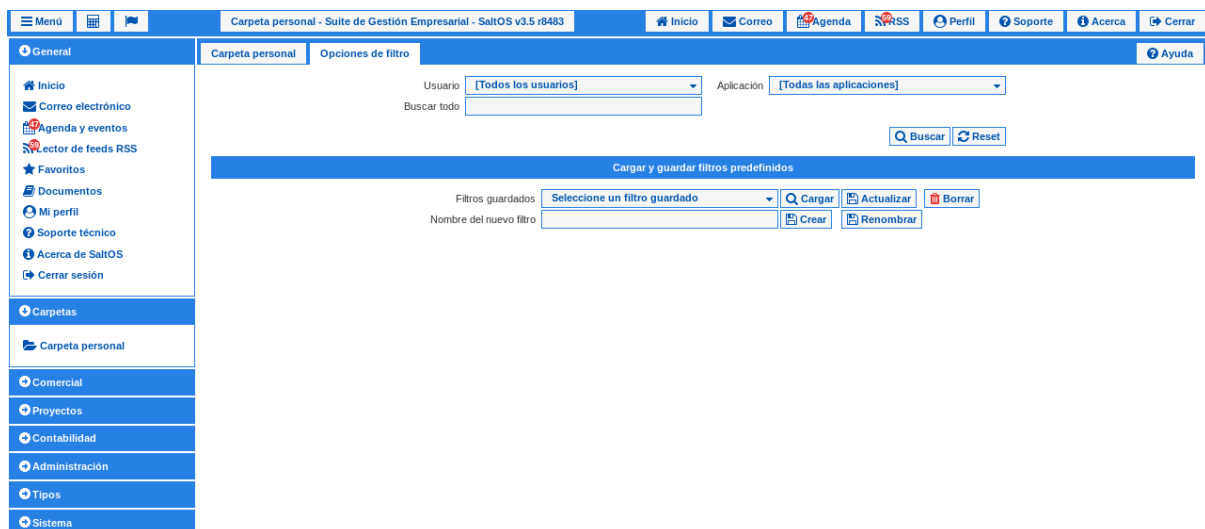
Depending on the application you will find other buttons:

-  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



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'.