

User Manual (en_US)

SaltOS 4.0 r1995

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1 Certificates

1.1 Description

The Certificates application is used to manage and track SSL/TLS certificates stored or monitored by the system.

This module allows administrators to register certificates, store metadata, monitor expiration dates, and ensure that security infrastructure remains up-to-date.

It is especially useful for managing certificates for custom domains, internal services, or external integrations.

1.2 List view

Certificate nicknames available:
Juan Pérez - Tech Solutions S.A.
Maria López - López Consultores Ltda.
Carlos Gómez - Innovatech Inc.
Ana Rodríguez - Rodríguez & Asociados
Pedro Martínez - Martínez Global LLC
Sofía Ramírez - Ramírez Consulting Group
Luis Fernández - Fernández & Hijos S.L.
Carmen Torres - Torres Digital Services
Diego Castro - Castro Ingeniería S.A.
Elena Moreno - Moreno & Partners
Andrés Vargas - Vargas Technology
Patricia Ríos - Ríos Financial Consulting
Gabriel Soto - Soto & Co.
Fernando Álvarez - Álvarez Construcciones
Rosa Medina - Medina Asesores
Héctor Herrera - Herrera Group LLC
Laura Ortiz - Ortiz IT Solutions
Javier Guzmán - Guzmán & Asociados
Beatriz Mendoza - Mendoza Design Studio
Manuel Navarro - Navarro Tech Solutions
Clara Espinoza - Espinoza Marketing
Alberto Vega - Vega Industrial S.A.

The following fields are displayed in the list view:

- Certificate nicknames available:: List of certificate aliases already stored and available in the system. It is not a database-driven table, but a visual display of loaded certificates.

1.3 Form view

This view is used to add, review, or update certificate information.

In **create** mode, the form is empty and ready to enter new data.

SaltOS Dashboard Applications ▾

Admin ▾

Certificate nicknames available:

Juan Pérez - Tech Solutions S.A.	<input type="button" value="View"/> <input type="button" value="Edit"/>
Maria López - López Consultores Ltda.	<input type="button" value="View"/> <input type="button" value="Edit"/>
Carlos Gómez - Innovatech Inc.	<input type="button" value="View"/> <input type="button" value="Edit"/>
Ana Rodríguez - Rodríguez & Asociados	<input type="button" value="View"/> <input type="button" value="Edit"/>
Pedro Martínez - Martínez Global LLC	<input type="button" value="View"/> <input type="button" value="Edit"/>
Sofía Ramírez - Ramírez Consulting Group	<input type="button" value="View"/> <input type="button" value="Edit"/>
Luis Fernández - Fernández & Hijos S.L.	<input type="button" value="View"/> <input type="button" value="Edit"/>
Carmen Torres - Torres Digital Services	<input type="button" value="View"/> <input type="button" value="Edit"/>
Diego Castro - Castro Ingeniería S.A.	<input type="button" value="View"/> <input type="button" value="Edit"/>
Elena Moreno - Moreno & Partners	<input type="button" value="View"/> <input type="button" value="Edit"/>
Andrés Vargas - Vargas Technology	<input type="button" value="View"/> <input type="button" value="Edit"/>
Patricia Ríos - Ríos Financial Consulting	<input type="button" value="View"/> <input type="button" value="Edit"/>
Gabriel Soto - Soto & Co.	<input type="button" value="View"/> <input type="button" value="Edit"/>
Fernando Álvarez - Álvarez Construcciones	<input type="button" value="View"/> <input type="button" value="Edit"/>
Rosa Medina - Medina Asesores	<input type="button" value="View"/> <input type="button" value="Edit"/>
Héctor Herrera - Herrera Group LLC	<input type="button" value="View"/> <input type="button" value="Edit"/>
Laura Ortiz - Ortiz IT Solutions	<input type="button" value="View"/> <input type="button" value="Edit"/>
Javier Guzmán - Guzmán & Asociados	<input type="button" value="View"/> <input type="button" value="Edit"/>
Beatriz Mendoza - Mendoza Design Studio	<input type="button" value="View"/> <input type="button" value="Edit"/>
Manuel Navarro - Navarro Tech Solutions	<input type="button" value="View"/> <input type="button" value="Edit"/>
Clara Espinoza - Espinoza Marketing	<input type="button" value="View"/> <input type="button" value="Edit"/>
Alberto Vega - Vega Industrial S.A.	<input type="button" value="View"/> <input type="button" value="Edit"/>

Certificate file (.p12, .pfx)

Choose Files No file chosen

Password file

The form includes the following fields:

- Certificate file (.p12, .pfx): File input used to upload one or more certificates in PKCS#12 format. Required to import certificates into the system.
- Password file: Password used to decrypt the uploaded certificate file. This field is required and not autofilled for security reasons.

In **view** mode, the fields are filled with the selected record and cannot be edited.

SaltOS Dashboard Applications ▾

Admin ▾

Certificate nicknames available:

Juan Pérez - Tech Solutions S.A.	<input type="button" value="View"/> <input type="button" value="Edit"/>
Maria López - López Consultores Ltda.	<input type="button" value="View"/> <input type="button" value="Edit"/>
Carlos Gómez - Innovatech Inc.	<input type="button" value="View"/> <input type="button" value="Edit"/>
Ana Rodríguez - Rodríguez & Asociados	<input type="button" value="View"/> <input type="button" value="Edit"/>
Pedro Martínez - Martínez Global LLC	<input type="button" value="View"/> <input type="button" value="Edit"/>
Sofía Ramírez - Ramírez Consulting Group	<input type="button" value="View"/> <input type="button" value="Edit"/>
Luis Fernández - Fernández & Hijos S.L.	<input type="button" value="View"/> <input type="button" value="Edit"/>
Carmen Torres - Torres Digital Services	<input type="button" value="View"/> <input type="button" value="Edit"/>
Diego Castro - Castro Ingeniería S.A.	<input type="button" value="View"/> <input type="button" value="Edit"/>
Elena Moreno - Moreno & Partners	<input type="button" value="View"/> <input type="button" value="Edit"/>
Andrés Vargas - Vargas Technology	<input type="button" value="View"/> <input type="button" value="Edit"/>
Patricia Ríos - Ríos Financial Consulting	<input type="button" value="View"/> <input type="button" value="Edit"/>
Gabriel Soto - Soto & Co.	<input type="button" value="View"/> <input type="button" value="Edit"/>
Fernando Álvarez - Álvarez Construcciones	<input type="button" value="View"/> <input type="button" value="Edit"/>
Rosa Medina - Medina Asesores	<input type="button" value="View"/> <input type="button" value="Edit"/>
Héctor Herrera - Herrera Group LLC	<input type="button" value="View"/> <input type="button" value="Edit"/>
Laura Ortiz - Ortiz IT Solutions	<input type="button" value="View"/> <input type="button" value="Edit"/>
Javier Guzmán - Guzmán & Asociados	<input type="button" value="View"/> <input type="button" value="Edit"/>
Beatriz Mendoza - Mendoza Design Studio	<input type="button" value="View"/> <input type="button" value="Edit"/>
Manuel Navarro - Navarro Tech Solutions	<input type="button" value="View"/> <input type="button" value="Edit"/>
Clara Espinoza - Espinoza Marketing	<input type="button" value="View"/> <input type="button" value="Edit"/>
Alberto Vega - Vega Industrial S.A.	<input type="button" value="View"/> <input type="button" value="Edit"/>

Name

Info

```
[subject]
countryName: ES
stateOrProvinceName: Spain
localityName: Barcelona
organizationName: Tech Solutions S.A.
commonName: Juan Pérez
emailAddress: juan.perez@example.com

[info]
serialNumber: 74:01:37:EB:47:48:F9:AD:49:F8:81:A9:2C:CE:5D:30:74:6C:94:E7
validFrom: 2025-02-09 10:35:09
validTo: 2026-02-09 10:35:09
signatureType: RSA-SHA256
md5: 67:8E:15:A6:9C:55:03:0B:2A:25:56:4C:C0:4C:66:2D
sha1: 29:A4:72:8E:63:61:A9:E2:E8:AF:B8:06:2D:CF:17:A:9F:8F:CF:5D
sha256: FB:6D:BC:C9:53:91:E7:3F:66:9C:4E:43:8F:D6:D0:4C:0E:9E:95:C5:BE:AA:E1:F6:CB:1B:AA:12:84:82:A8:9A
```

The form includes the following fields:

- Name: Display name or alias of the certificate.
- Info: Technical details of the certificate, including issuer, expiration, and subject. Displayed in a read-only text area.

1.4 Delete

Certificates can be deleted if no longer relevant.

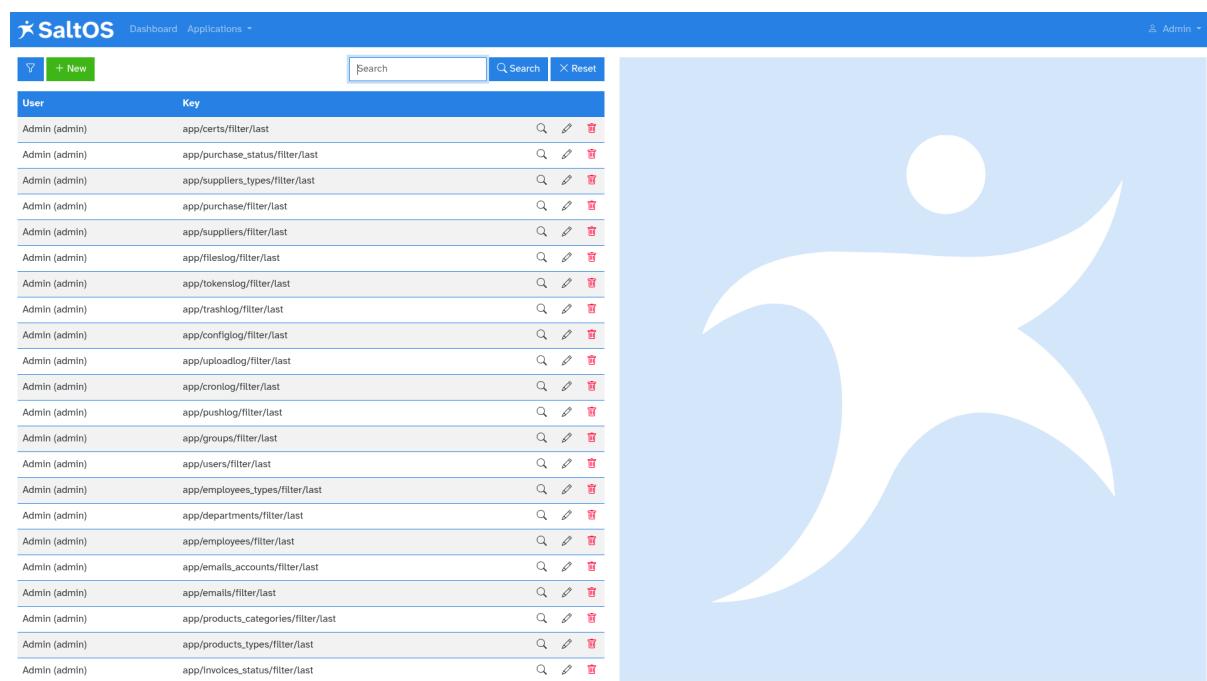
However, it is recommended to retain expired entries for audit purposes.

2 Config Log

2.1 Description

The Config Log application provides a trace of all configuration changes made within SaltOS4. It is used to monitor modifications to system parameters, app settings, or internal preferences. This module is essential for administrators who want to audit changes and ensure consistent system behavior over time.

2.2 List view



User	Key
Admin (admin)	app/certs/filter/last
Admin (admin)	app/purchase_status/filter/last
Admin (admin)	app/suppliers_types/filter/last
Admin (admin)	app/purchase/filter/last
Admin (admin)	app/suppliers/filter/last
Admin (admin)	app/fileslog/filter/last
Admin (admin)	app/tokenslog/filter/last
Admin (admin)	app/trashlog/filter/last
Admin (admin)	app/configlog/filter/last
Admin (admin)	app/uploadlog/filter/last
Admin (admin)	app/cronlog/filter/last
Admin (admin)	app/pushlog/filter/last
Admin (admin)	app/groups/filter/last
Admin (admin)	app/users/filter/last
Admin (admin)	app/employees_types/filter/last
Admin (admin)	app/departments/filter/last
Admin (admin)	app/employees/filter/last
Admin (admin)	app/emails_accounts/filter/last
Admin (admin)	app/emails/filter/last
Admin (admin)	app/products_categories/filter/last
Admin (admin)	app/products_types/filter/last
Admin (admin)	app/invoices_status/filter/last

The following fields are displayed in the list view:

- User: User who made the configuration change.
- Key: Configuration key that was modified.

2.3 View entry

This view displays the full details of a single configuration change record.

In **create** mode, the form is empty and ready to enter new data.

The screenshot shows the SaltOS configuration change entry creation screen. On the left, there is a list of configuration keys with their corresponding values. On the right, there is a form for creating a new entry. The form includes fields for User (Admin (admin)), Key (app/company/filter/last), and Value (1). There are also buttons for Create and Cancel.

User	Key
Admin (admin)	app/certs/filter/last
Admin (admin)	app/purchase_status/filter/last
Admin (admin)	app/suppliers_types/filter/last
Admin (admin)	app/purchase/filter/last
Admin (admin)	app/suppliers/filter/last
Admin (admin)	app/fileslog/filter/last
Admin (admin)	app/tokenslog/filter/last
Admin (admin)	app/trashlog/filter/last
Admin (admin)	app/configlog/filter/last
Admin (admin)	app/uploadlog/filter/last
Admin (admin)	app/cronlog/filter/last
Admin (admin)	app/pushlog/filter/last
Admin (admin)	app/groups/filter/last
Admin (admin)	app/users/filter/last
Admin (admin)	app/employees_types/filter/last
Admin (admin)	app/departments/filter/last
Admin (admin)	app/employees/filter/last
Admin (admin)	app/emails_accounts/filter/last
Admin (admin)	app/emails/filter/last
Admin (admin)	app/products_categories/filter/last
Admin (admin)	app/products_types/filter/last
Admin (admin)	app/invoices_status/filter/last

In **view** mode, the fields are filled with the selected record and cannot be edited.

The screenshot shows the SaltOS configuration change entry view screen. On the left, there is a list of configuration keys with their corresponding values. On the right, there is a form for viewing a specific entry. The form includes fields for User (Admin (admin)), Key (app/company/filter/last), and Value (1 { "page": "0", "search": "", "search_extra": ""}). There are also buttons for Edit, Delete, and Close.

User	Key
Admin (admin)	app/certs/filter/last
Admin (admin)	app/purchase_status/filter/last
Admin (admin)	app/suppliers_types/filter/last
Admin (admin)	app/purchase/filter/last
Admin (admin)	app/suppliers/filter/last
Admin (admin)	app/fileslog/filter/last
Admin (admin)	app/tokenslog/filter/last
Admin (admin)	app/trashlog/filter/last
Admin (admin)	app/configlog/filter/last
Admin (admin)	app/uploadlog/filter/last
Admin (admin)	app/cronlog/filter/last
Admin (admin)	app/pushlog/filter/last
Admin (admin)	app/groups/filter/last
Admin (admin)	app/users/filter/last
Admin (admin)	app/employees_types/filter/last
Admin (admin)	app/departments/filter/last
Admin (admin)	app/employees/filter/last
Admin (admin)	app/emails_accounts/filter/last
Admin (admin)	app/emails/filter/last
Admin (admin)	app/products_categories/filter/last
Admin (admin)	app/products_types/filter/last
Admin (admin)	app/invoices_status/filter/last

In **edit** mode, the form is pre-filled and allows modifications.

User	Key
Admin (admin)	app/certs/filter/last
Admin (admin)	app/purchase_status/filter/last
Admin (admin)	app/suppliers_types/filter/last
Admin (admin)	app/purchase/filter/last
Admin (admin)	app/suppliers/filter/last
Admin (admin)	app/fileslog/filter/last
Admin (admin)	app/tokenslog/filter/last
Admin (admin)	app/trashlog/filter/last
Admin (admin)	app/configlog/filter/last
Admin (admin)	app/uploadlog/filter/last
Admin (admin)	app/cronlog/filter/last
Admin (admin)	app/pushlog/filter/last
Admin (admin)	app/groups/filter/last
Admin (admin)	app/users/filter/last
Admin (admin)	app/employees_types/filter/last
Admin (admin)	app/departments/filter/last
Admin (admin)	app/employees/filter/last
Admin (admin)	app/emails_accounts/filter/last
Admin (admin)	app/emails/filter/last
Admin (admin)	app/products_categories/filter/last
Admin (admin)	app/products_types/filter/last
Admin (admin)	app/invoices_status/filter/last

It includes:

- User: User who made the configuration change.
- Key: Configuration key that was modified.
- Value: New value assigned to the configuration key.

2.4 Delete

Entries in the config log cannot be deleted under normal circumstances.

This log is designed to ensure full traceability and auditability of administrative actions.

3 Cron Log

3.1 Description

The Cron Log application stores the execution history of scheduled tasks (cron jobs) within SaltOS4. It allows administrators to monitor background processes such as email retrieval, data imports, backups, or custom jobs. This module is essential for troubleshooting and verifying that scheduled operations are running correctly.

3.2 List view

The screenshot shows the SaltOS dashboard with a "List view" section. At the top, there's a navigation bar with the SaltOS logo, "Dashboard", "Applications", and "Admin". Below the navigation is a search bar with fields for "Search", "Search", and "Reset". A table follows, with columns titled "Command", "Start time", "Out", and "Err". A message "Data not found" is displayed below the table. At the bottom right of the table area is a blue button labeled "+ Load more". To the right of the table, there's a large, light blue placeholder image of a person in a dynamic pose.

The following fields are displayed in the list view:

- Command: Command or script executed by the cron system.
- Start: Start time of the scheduled task execution.
- Out: Short version or preview of the standard output.
- Err: Short version or preview of the error output.

3.3 View entry

This view displays the full result of a single cron job execution.

It includes:

- Command: Command or script executed by the cron system.
- PID: Process ID assigned to the running cron task.
- Start: Start time of the scheduled task execution.
- Stop: Time when the task finished running.
- STDOUT: Standard output generated by the task during execution.
- STDERR: Standard error output generated by the task.

3.4 Delete

Cron log entries are not meant to be deleted regularly.

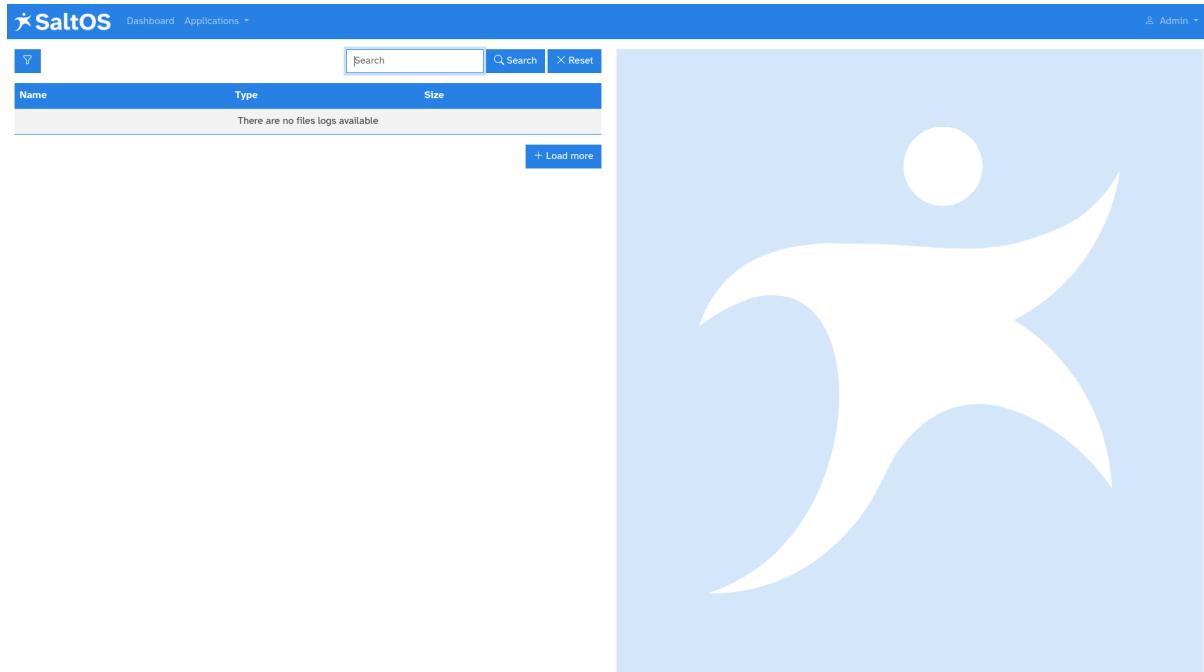
Automatic cleanup or manual purge may be configured to remove older entries.

4 Files Log

4.1 Description

The Files Log application records all file access events within SaltOS4. It tracks when files are viewed, downloaded, or otherwise accessed by users, including associated metadata. This module provides a complete audit trail for document activity, supporting traceability and data governance policies.

4.2 List view



The screenshot shows the SaltOS4 application interface with a blue header bar containing the SaltOS logo, 'Dashboard', 'Applications', and 'Admin' dropdown. The main area has a light blue background featuring a large white stylized 'S' logo. On the left, there is a search bar with 'Search' and 'Reset' buttons. Below the search bar is a table with three columns: 'Name', 'Type', and 'Size'. A message 'There are no files logs available' is displayed. At the bottom right of the table is a blue button labeled '+ Load more'.

The following fields are displayed in the list view:

- Name: Name of the accessed or managed file within the system.
- Type: File format or classification (e.g., PDF, image, text).
- Size: Size of the file in bytes.

4.3 View entry

This view shows detailed information about a file access event.

It includes:

- Name: Name of the accessed or managed file within the system.
- Type: File format or classification (e.g., PDF, image, text).
- Size: Size of the file in bytes.
- Data: Internal content, metadata or serialized structure representing the file access or action.

4.4 Delete

File log entries are usually not deleted manually.

They are retained for accountability and security monitoring, and may be purged automatically based on system settings.

5 Push Log

5.1 Description

The Push Log application records all push notifications triggered by the system. These notifications are typically sent to users to alert them about actions, updates, or system events in real time. This module allows administrators to monitor the flow of notifications and diagnose potential issues in the delivery process.

5.2 List view

User	Datetime	Type
Data not found		

+ Load more

The following fields are displayed in the list view:

- User: User who triggered or received the push notification.
- Datetime: Date and time when the push notification was recorded.
- Type: Category of the push message (e.g., info, warning, error).

5.3 View entry

This view shows full details of a single push notification.

It includes:

- User: User who triggered or received the push notification.
- Datetime: Date and time when the push notification was recorded.
- Type: Category of the push message (e.g., info, warning, error).
- Message: Content or summary of the push message sent.
- Timestamp: Internal system timestamp when the event was logged.

5.4 Delete

Push log entries are generally not deleted and are kept for audit purposes.

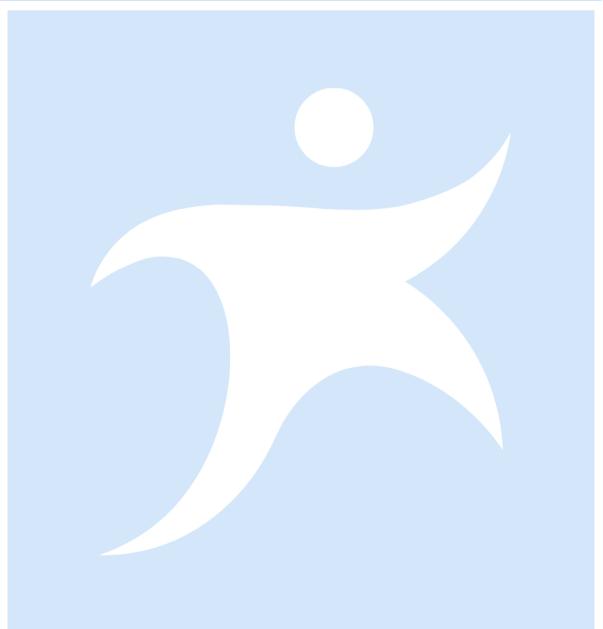
In specific maintenance scenarios, old records may be purged, but this requires explicit permissions.

6 Tokens Log

6.1 Description

The Tokens Log application tracks the usage of authentication tokens across the system. These tokens are typically used in API calls, automated scripts, or temporary login sessions. This module allows administrators to monitor access to the system and detect potential misuse or unauthorized attempts.

6.2 List view



User	Created	Token	Active
Admin (admin)	2025-04-21 00:48:10	1de4a385-a5c6-d8e3-f230-6ef84db3254	✓
Admin (admin)	2025-04-21 00:41:23	8c1530f5-edc0-eec0-18a9-f8e412400d4d	✗
Admin (admin)	2025-04-21 00:39:25	0fa912c3-b75d-6002-3833-3645b021df7a	✗
Admin (admin)	2025-04-21 00:35:33	84cc8ff-7837-1a30-0892-0bf1675ac5c1	✗
Admin (admin)	2025-04-21 00:34:27	94199c55-fefb-0b88-8332-2a37195c2305	✗
Admin (admin)	2025-04-21 00:32:37	e9458f12-7e11-c54-d45-516aa119a2328	✗
Admin (admin)	2025-04-21 00:31:48	7d751457-08b7-b96e-c5ee-5ba5c2e5d7c0	✗
Admin (admin)	2025-04-20 20:47:09	4adf6ff6-e7b-8591-dd5d-17caa31466ab	✗
Admin (admin)	2025-04-20 20:29:58	2deb08ed-d4c5-fdsc-0b67-4069ea86e131	✗
Admin (admin)	2025-04-20 20:15:52	32fbe63-1ef2-bcaf-81c4-489ccb423ea0	✗
Admin (admin)	2025-04-20 20:11:21	4821bf11-3eb3-72d9-0b8d-81b032386ffb	✗
Admin (admin)	2025-04-20 20:00:12	3cf6d146-a702-b2dd-12ba-74ce92d93b31	✗
Admin (admin)	2025-04-20 18:23:35	afdf0640-b16b-beaf-4a57-1ffc610c21ab	✗
Admin (admin)	2025-04-20 18:22:18	13c7d9cb-a18e-8753-d103-c3532e86d8cc	✗
Admin (admin)	2025-04-20 18:13:43	9316f056-49f6-50a6-f74b-5836aa63f699	✗
Admin (admin)	2025-04-20 18:13:25	1970ab96-9b13-1c0e-9b3f-1a7cff36b9f	✗
Admin (admin)	2025-04-20 17:51:27	6445ee2b-edbf-dd5a-f991-76dc9b94f507	✗
Admin (admin)	2025-04-20 17:42:11	76912b39-e722-0909-061b-9b06c9c39a82	✗
Admin (admin)	2025-04-20 17:42:07	4dc52b67-7c89-62d9-d156-d87a84778ab6	✗
Admin (admin)	2025-04-19 21:43:49	97706de2-1f56-4bfc-1ada-d166ab841ec8	✗

The following fields are displayed in the list view:

- User: User associated with the token.
- Created: Date and time when the token was created.
- Token: The token string used for authentication or access.
- Active: Indicates whether the token is currently valid and usable.

6.3 View entry

This view displays all information related to a specific token access.

The screenshot shows the SaltOS interface for viewing token access entries. At the top, there's a search bar and a 'Reset' button. Below that is a table with columns: User, Created, Token, and Active. The 'Active' column contains green checkmarks for most rows. To the right of the table, a detailed view panel is open, showing fields for User (Admin (admin)), Created (04/19/2025, 09:43:49 PM), Updated (04/20/2025, 05:38:18 PM), Remote Address (127.0.0.1), User Agent (Mozilla/5.0 (X11; Linux x86_64; rv:137.0) Gecko/20190101 Firefox/137.0), Token (97706de2-1f56-4bfc-1ada-d166ab841ec8), and Expires (04/21/2025, 05:38:18 PM). A 'Close' button is at the bottom right of the detail panel.

User	Created	Token	Active
Admin (admin)	2025-04-21 00:48:10	1de4a385-a5c6-d8e3-f230-6efd84db3254	✓
Admin (admin)	2025-04-21 00:41:23	8cf530f5-edef-0-eee9-18a9-8e4f2490d4d	✗
Admin (admin)	2025-04-21 00:39:25	0fa9f2c3-b75d-6002-3833-3645b2dd7a	✗
Admin (admin)	2025-04-21 00:35:33	8c4ccbf7-7837-1a39-0-892-0bf1675ac51	✗
Admin (admin)	2025-04-21 00:34:27	94199c55-feb-0-8322-2a37195c2395	✗
Admin (admin)	2025-04-21 00:32:37	e9458f12-7ea-1c54-da54-516a110a2328	✗
Admin (admin)	2025-04-21 00:31:48	7d751457-0-88b7-b96-e-c5ee-5ba5c2e5d7c0	✗
Admin (admin)	2025-04-20 28:47:99	4adff6f6-47fb-8591-dd5d-17caa3146 gab	✗
Admin (admin)	2025-04-20 28:29:58	2debf08ed-d4c5-fdac-0-6b67-4069ea86e131	✗
Admin (admin)	2025-04-20 20:15:52	32efbe63-1ef2-bcaf-81c4-489ccb423ea0	✗
Admin (admin)	2025-04-20 20:11:21	4821b8f1-3eb3-72d9-808d-818032386ff	✗
Admin (admin)	2025-04-20 20:06:12	3cf6d146-a702-b2dd-12b4-74ce92d03b31	✗
Admin (admin)	2025-04-20 18:23:35	afdf0640-b18b-8ea1-4a57-1ffc610c21ab	✗
Admin (admin)	2025-04-20 18:22:18	13c7d9ccb-a18e-8753-d1f3-c3532e86d8cc	✗
Admin (admin)	2025-04-20 18:13:43	931f0f56-49f6-50a6-f74b-5830aa63f699	✗
Admin (admin)	2025-04-20 18:13:25	19708b96-9b13-1c0e-9b3f-1a77cff36b9f	✗
Admin (admin)	2025-04-20 17:51:27	6445ee2b-edbf-dd5a-1991-76dc9b941567	✗
Admin (admin)	2025-04-20 17:42:11	70912b30-e722-0-000-061b-9b06c939a82	✗
Admin (admin)	2025-04-20 17:42:07	4dc52b07-7c89-02d9-d156-d87a84778ab6	✗
Admin (admin)	2025-04-19 21:43:49	97706de2-1f56-4bfc-1ada-d166ab841ec8	✗

Total: 20

+ Load more

It includes:

- Active: Indicates whether the token is currently valid and usable.
- User: User associated with the token.
- Created: Date and time when the token was created.
- Updated: Date and time of the last update to the token's state.
- Remote Address: IP address from which the token was used or created.
- User Agent: Browser or client used when the token was generated or accessed.
- Token: The token string used for authentication or access.
- Expires: Expiration date and time of the token, after which it is no longer valid.

6.4 Delete

Token log entries are not meant to be deleted manually.

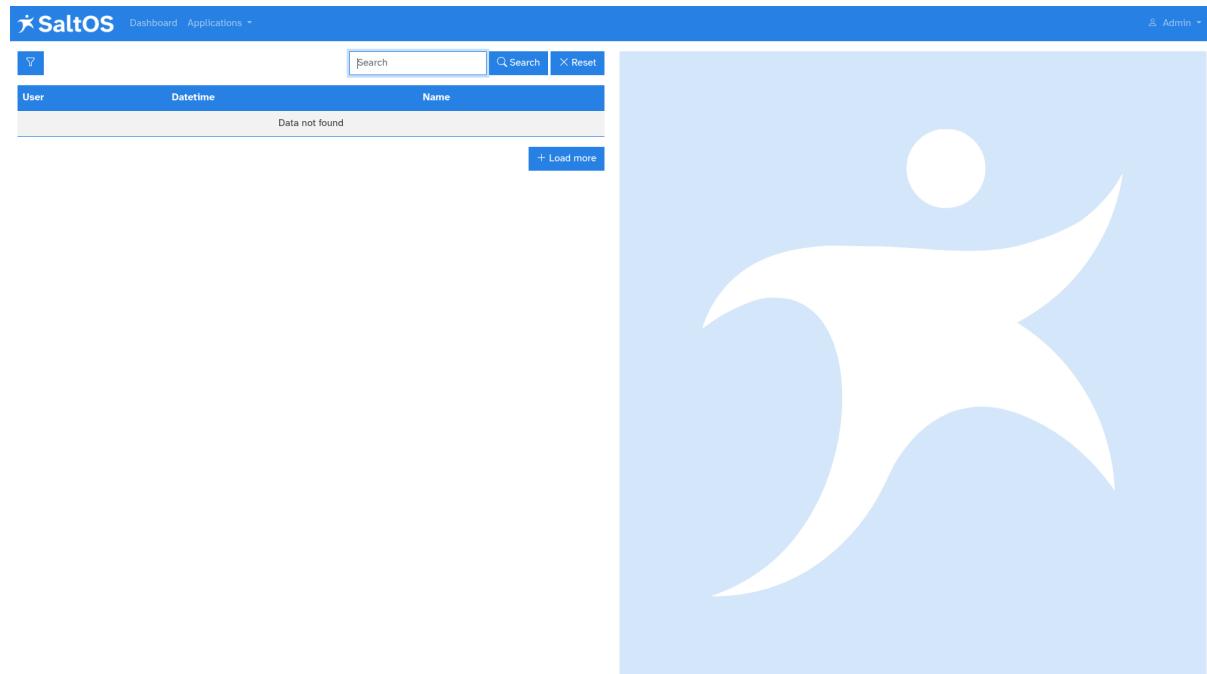
They form part of the system's audit and access control history, and are subject to automatic cleanup if configured.

7 Trash Log

7.1 Description

The Trash Log application records all deletions performed in the system, acting as a recycle bin for SaltOS4. It allows administrators and advanced users to inspect what data has been removed, when, by whom, and from where. This module is key for auditability and helps identify accidental deletions or unauthorized actions.

7.2 List view

A screenshot of the SaltOS4 web interface. The top navigation bar shows the SaltOS logo, a dashboard icon, and application links. On the right, there is an "Admin" dropdown. The main content area has a blue header bar with columns for "User", "Datetime", and "Name". Below this, a message says "Data not found". At the bottom right of the content area is a blue button labeled "+ Load more". The background of the page features a large, stylized white graphic of a person in a dynamic pose, set against a light blue gradient.

The following fields are displayed in the list view:

- User: User who performed the deletion.
- Datetime: Exact date and time when the record was deleted.
- Name: Descriptive name of the deleted record or file.

7.3 View entry

This view displays all recorded information about a deleted item.

It includes:

- Old ID: Original identifier of the record before deletion.
- User: User who performed the deletion.

- Datetime: Exact date and time when the record was deleted.
- Reg ID: Internal registry ID assigned to the deleted record.
- App: Application or module from which the record was removed.
- Uniq ID: System-wide unique identifier for the deleted item.
- Name: Descriptive name of the deleted record or file.
- Size: File size in bytes, if the deleted item was a file.
- Type: MIME type or classification of the deleted file or record.
- File: Original filename or path of the deleted file.
- Hash: Checksum used to verify the content of the deleted item.

7.4 Delete

Trash log entries cannot be deleted directly from the interface.

SaltOS4 retains them for accountability and legal traceability unless automatic pruning is configured.

8 Upload Log

8.1 Description

The Upload Log application registers all file uploads made through SaltOS4, whether manual or automated. It helps track the origin, user, and context of each uploaded file, and is useful for auditing, debugging, and verifying that uploads are being processed correctly.

8.2 List view

The screenshot shows the SaltOS dashboard with a list view. At the top, there's a navigation bar with the SaltOS logo, 'Dashboard', 'Applications', and an 'Admin' dropdown. Below the navigation is a search bar with fields for 'Search', 'Q Search', and 'Reset'. The main area has a header with columns: 'User', 'Datetime', 'App', and 'Name'. A message 'Data not found' is displayed below the header. At the bottom right of the list area is a blue button labeled '+ Load more'. To the right of the list area is a large, light blue background image featuring a white, stylized graphic of a person in motion.

The following fields are displayed in the list view:

- User: User who uploaded the file.
- Datetime: Timestamp when the file was uploaded to the system.
- App: Module or application from which the upload was triggered.
- Name: Original filename as provided by the user.

8.3 View entry

This view shows full details of a single uploaded file log entry.

It includes:

- User: User who uploaded the file.
- Datetime: Timestamp when the file was uploaded to the system.
- Uniq ID: Unique identifier internally assigned to the upload entry.
- App: Module or application from which the upload was triggered.
- Name: Original filename as provided by the user.
- Size: Size of the uploaded file in bytes.
- Type: MIME type or format of the uploaded file.
- File: Stored filename used by the system to manage the file internally.
- Hash: Checksum (e.g., MD5 or SHA) to verify file integrity or detect duplicates.

8.4 Delete

Upload log entries are normally preserved for historical traceability.

If needed, old entries may be deleted manually or through automatic maintenance routines.

9 Company

9.1 Description

The Company application stores the identification and contact details of the organization using SaltOS4. This data is used across the system to personalize documents (quotes, invoices, emails, etc.) and define the legal and fiscal identity of the company.

It typically includes the company's name, tax code, address, logo, and preferred language.

9.2 List view

Name	CIF	City	Country	Active
SaltOS Solutions SL	B12345678	Barcelona	Spain	✓

Total: 1

+ Load more

The following fields are displayed in the list view:

- Name: Official name of the company or organization.
- CIF: Tax identification number (NIF, CIF, VAT, etc.) of the company.
- City: City where the company is located.
- Country: Country where the company is legally registered or operates.
- Active: Indicates whether this company profile is active in the system.

9.3 Form view

This view is used to define or edit the company profile.

In **create** mode, the form is empty and ready to enter new data.

Name	CIF	City	Country	Active
SaltOS Solutions SL	B12345678	Barcelona	Spain	<input checked="" type="checkbox"/> Active

Total: 1

+ Load more

Name:

Code:

Address:

City:

Province / State:

Zip:

Country:

Phone:

Email:

Website:

IBAN:

SWIFT/BIC:

Fiscal Regime:

Activity Code:

Additional Notes:

New files: Choose Files No file chosen

New note:

In **view** mode, the fields are filled with the selected record and cannot be edited.

Name	CIF	City	Country	Active
SaltOS Solutions SL	B12345678	Barcelona	Spain	<input checked="" type="checkbox"/> Active

Total: 1

+ Load more

Name: SaltOS Solutions SL

Code: B12345678

Address: Calle Ficticia 123, 3ºA

City: Barcelona

Province / State: Barcelona

Zip: 08001

Country: Spain

Phone: +34 933 123 456

Email: info@saltos.org

Website: https://www.saltos.org

IBAN: ES76 1234 5678 9101 2345 6789

SWIFT/BIC: BESMESMMXXX

Fiscal Regime: RE - Régimen General

Activity Code: 8299

Additional Notes: Entidad acogida al régimen general del IVA

In **edit** mode, the form is pre-filled and allows modifications.

The screenshot shows the SaltOS application interface for managing company profiles. On the left, there's a search bar and a table listing one company entry: SaltOS Solutions SL with CIF B12345678, located in Barcelona, Spain. A 'Load more' button is visible below the table. The main right panel is a detailed form for editing the selected company. It includes fields for Name (SaltOS Solutions SL), Code (B12345678), Address (Calle Ficticia 123, 3^A), City (Barcelona), Province / State (Barcelona), Zip (08001), Country (Spain), Phone (+34 933 123 456), Email (info@saltos.org), Website (https://www.saltos.org), IBAN (ES76 1234 5678 9101 2345 6789), SWIFT/BIC (BESMESMMXX), Fiscal Regime (RE - Régimen General), Activity Code (8299), and Additional Notes (Entidad acogida al régimen general del IVA). There are also sections for New files (Choose Files) and New note. At the bottom are 'Save' and 'Cancel' buttons.

The form includes the following fields:

- Active: Indicates whether this company profile is active in the system.
- Name: Official name of the company or organization.
- Code: Tax identification number (NIF, CIF, VAT, etc.) of the company.
- Address: Official street or mailing address of the company.
- City: City where the company is located.
- Province / State: Province, state, or region where the company is based.
- ZIP: Postal code of the company's registered address.
- Country: Country where the company is legally registered or operates.
- Phone: Main phone number for company inquiries.
- Email: Primary email address used for administrative or legal contact.
- Website: The public website or landing page of the company.
- IBAN: International Bank Account Number used for wire transfers.
- SWIFT/BIC: SWIFT/BIC code identifying the bank of the company for international transfers.
- Fiscal Regime: Tax regime under which the company operates (e.g., general, simplified, small business).
- Activity Code: Economic activity classification code (e.g., CNAE, NACE).
- Additional Notes: Internal remarks or additional information about the company.

9.4 Delete

The company profile cannot be deleted if it's the only active one in the system.

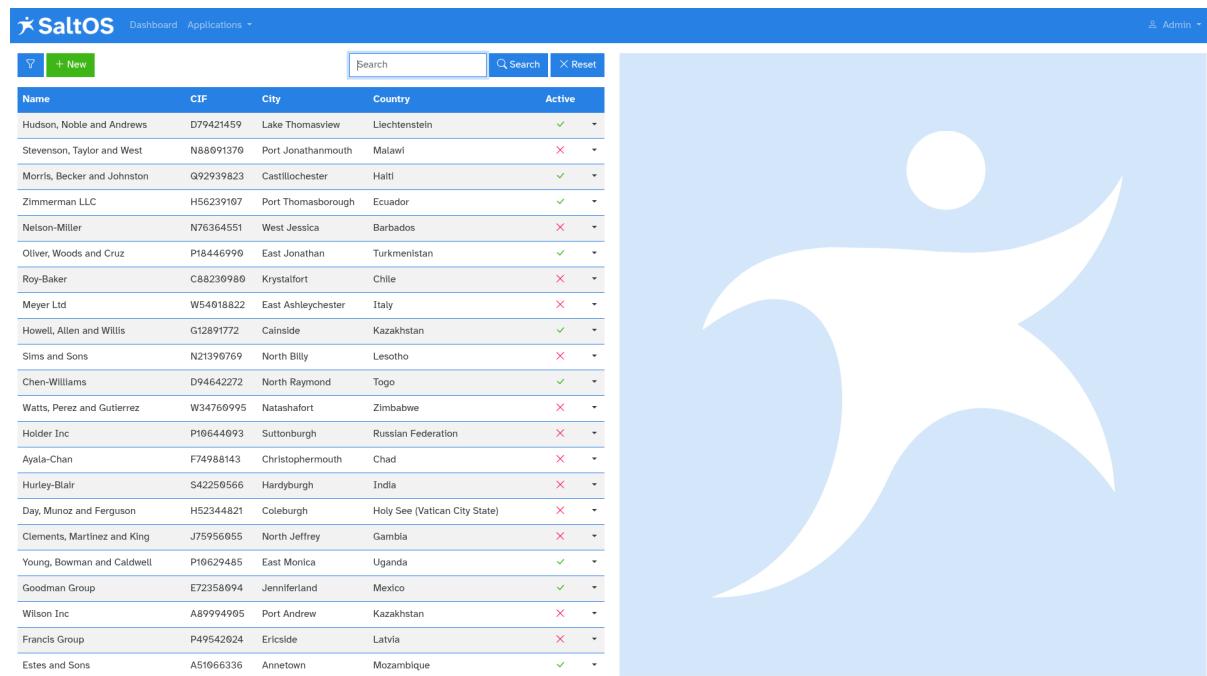
Only deactivation is allowed in most configurations.

10 Customers

10.1 Description

The Customers application allows you to manage your client base within SaltOS4. It centralizes all information related to customers, such as identification, contact details, tax code, address, and classification. It also serves as a hub to link customers with other modules like quotes, invoices, meetings, and emails.

10.2 List view



Name	CIF	City	Country	Active
Hudson, Noble and Andrews	D79421459	Lake Thomasview	Liechtenstein	✓ ▾
Stevenson, Taylor and West	N88691370	Port Jonathanmouth	Malawi	✗ ▾
Morris, Becker and Johnston	Q92939823	Castillochester	Haiti	✓ ▾
Zimmerman LLC	H56239107	Port Thomasborough	Ecuador	✓ ▾
Nelson-Miller	N76364551	West Jessica	Barbados	✗ ▾
Oliver, Woods and Cruz	P18446990	East Jonathan	Turkmenistan	✓ ▾
Roy-Baker	C88230980	Krystalfort	Chile	✗ ▾
Meyer Ltd	W54018822	East Ashleychester	Italy	✗ ▾
Howell, Allen and Willis	G12891772	Calnside	Kazakhstan	✓ ▾
Sims and Sons	N21990769	North Billy	Lesotho	✗ ▾
Chen-Williams	D94642272	North Raymond	Togo	✓ ▾
Watts, Perez and Gutierrez	W34760995	Natashafort	Zimbabwe	✗ ▾
Holder Inc	P10644693	Suttonburgh	Russian Federation	✗ ▾
Ayala-Chan	F74988143	Christophermouth	Chad	✗ ▾
Hurley-Blair	S42250566	Hardyburgh	India	✗ ▾
Day, Munoz and Ferguson	H52344821	Coleburgh	Holy See (Vatican City State)	✗ ▾
Clements, Martinez and King	J75956055	North Jeffrey	Gambia	✗ ▾
Young, Bowman and Caldwell	P10629485	East Monica	Uganda	✓ ▾
Goodman Group	E72358694	Jenniferland	Mexico	✓ ▾
Wilson Inc	A89994905	Port Andrew	Kazakhstan	✗ ▾
Francis Group	P49542024	Ericslide	Latvia	✗ ▾
Estes and Sons	A51066336	Annetown	Mozambique	✓ ▾

The following fields are displayed in the list view:

- Name: Full name or business name of the customer.
- CIF: Customer's tax identification code (NIF, CIF, VAT, etc.).
- City: City or locality of the customer.
- Country: Country where the customer is legally registered or operates.
- Active: Indicates if the customer is active in the system.

10.3 Form view

This view is used for creating, editing or viewing a customer record.

In **create** mode, the form is empty and ready to enter new data.

SaltOS Dashboard Applications ▾ Admin ▾

Name	CIF	City	Country	Active
Hudson, Noble and Andrews	D79421459	Lake Thomasview	Liechtenstein	✓ ▾
Stevenson, Taylor and West	N8&091370	Port Jonathanmouth	Malawi	✗ ▾
Morris, Becker and Johnston	Q92939823	Castillochester	Haiti	✓ ▾
Zimmerman LLC	H56239197	Port Thomasborough	Ecuador	✓ ▾
Nelson-Miller	N76364551	West Jessica	Barbados	✗ ▾
Oliver, Woods and Cruz	P18446990	East Jonathan	Turkmenistan	✓ ▾
Roy-Baker	C88230980	Krystalfort	Chile	✗ ▾
Meyer Ltd	W54018822	East Ashleychester	Italy	✗ ▾
Howell, Allen and Willis	G12891772	Cainside	Kazakhstan	✓ ▾
Sims and Sons	N21390769	North Billy	Lesotho	✗ ▾
Chen-Williams	D94642272	North Raymond	Togo	✓ ▾
Watts, Perez and Gutierrez	W34760995	Natashafort	Zimbabwe	✗ ▾
Holder Inc	P10644093	Suttonburgh	Russian Federation	✗ ▾
Ayala-Chan	F74988143	Christophermouth	Chad	✗ ▾
Hurley-Blair	S42250566	Hardyburgh	India	✗ ▾
Day, Munoz and Ferguson	H52344821	Coleburgh	Holy See (Vatican City State)	✗ ▾
Clements, Martinez and King	J75956055	North Jeffrey	Gambia	✗ ▾
Young, Bowman and Caldwell	P10629485	East Monica	Uganda	✓ ▾
Goodman Group	E72358994	Jenniferland	Mexico	✓ ▾
Wilson Inc	A89994905	Port Andrew	Kazakhstan	✗ ▾
Francis Group	P49542024	Ericside	Latvia	✗ ▾
Estes and Sons	A51066336	Annetown	Mozambique	✓ ▾

Active

Name:

CIF:

Address:

City:

Province / State:

Zip:

Country:

Email:

Phone:

Website:

Notes:

Type:

✓ Create ✗ Cancel

In **view** mode, the fields are filled with the selected record and cannot be edited.

SaltOS Dashboard Applications ▾ Admin ▾

Name	CIF	City	Country	Active
Hudson, Noble and Andrews	D79421459	Lake Thomasview	Liechtenstein	✓ ▾
Stevenson, Taylor and West	N8&091370	Port Jonathanmouth	Malawi	✗ ▾
Morris, Becker and Johnston	Q92939823	Castillochester	Haiti	✓ ▾
Zimmerman LLC	H56239197	Port Thomasborough	Ecuador	✓ ▾
Nelson-Miller	N76364551	West Jessica	Barbados	✗ ▾
Oliver, Woods and Cruz	P18446990	East Jonathan	Turkmenistan	✓ ▾
Roy-Baker	C88230980	Krystalfort	Chile	✗ ▾
Meyer Ltd	W54018822	East Ashleychester	Italy	✗ ▾
Howell, Allen and Willis	G12891772	Cainside	Kazakhstan	✓ ▾
Sims and Sons	N21390769	North Billy	Lesotho	✗ ▾
Chen-Williams	D94642272	North Raymond	Togo	✓ ▾
Watts, Perez and Gutierrez	W34760995	Natashafort	Zimbabwe	✗ ▾
Holder Inc	P10644093	Suttonburgh	Russian Federation	✗ ▾
Ayala-Chan	F74988143	Christophermouth	Chad	✗ ▾
Hurley-Blair	S42250566	Hardyburgh	India	✗ ▾
Day, Munoz and Ferguson	H52344821	Coleburgh	Holy See (Vatican City State)	✗ ▾
Clements, Martinez and King	J75956055	North Jeffrey	Gambia	✗ ▾
Young, Bowman and Caldwell	P10629485	East Monica	Uganda	✓ ▾
Goodman Group	E72358994	Jenniferland	Mexico	✓ ▾
Wilson Inc	A89994905	Port Andrew	Kazakhstan	✗ ▾
Francis Group	P49542024	Ericside	Latvia	✗ ▾
Estes and Sons	A51066336	Annetown	Mozambique	✓ ▾

✓ Edit ✗ Delete ✗ Close

In **edit** mode, the form is pre-filled and allows modifications.

The screenshot shows a two-panel interface. The left panel displays a table of customer records with columns: Name, CIF, City, Country, and Active. The right panel shows a detailed form for editing a specific customer record. The form fields include: Name (Hudson, Noble and Andrews), CIF (D79421459), Address (41964 David Mission), City (Lake Thomasview), Province / State (Florida), Zip (44644), Country (Liechtenstein), Email (latoya88@armstrong.com), Phone (627-803-9199), Website (https://scott.org), Notes (Enhanced background moderator), Type (Distributor), New files (Choose Files - No file chosen), and New note (empty). At the bottom are Save and Cancel buttons.

Name	CIF	City	Country	Active
Hudson, Noble and Andrews	D79421459	Lake Thomasview	Liechtenstein	✓ ▾
Stevenson, Taylor and West	N88691370	Port Jonathanmouth	Malawi	✗ ▾
Morris, Becker and Johnston	Q92939823	Castillochester	Haiti	✓ ▾
Zimmerman LLC	H56239197	Port Thomasborough	Ecuador	✓ ▾
Nelson-Miller	N76364551	West Jessica	Barbados	✗ ▾
Oliver, Woods and Cruz	P18446990	East Jonathan	Turkmenistan	✓ ▾
Roy-Baker	C88230980	Krystalfort	Chile	✗ ▾
Meyer Ltd	W54018822	East Ashleychester	Italy	✗ ▾
Howell, Allen and Willis	G12691772	Cainside	Kazakhstan	✓ ▾
Sims and Sons	N21390769	North Billy	Lesotho	✗ ▾
Chen-Williams	D94642272	North Raymond	Togo	✓ ▾
Watts, Perez and Gutierrez	W34760995	Natashafort	Zimbabwe	✗ ▾
Holder Inc	P10644093	Suttonburgh	Russian Federation	✗ ▾
Ayala-Chan	F74988143	Christophermouth	Chad	✗ ▾
Hurley-Blair	S42250566	Hardyburgh	India	✗ ▾
Day, Munoz and Ferguson	H52344821	Coleburgh	Holy See (Vatican City State)	✗ ▾
Clements, Martinez and King	J75956055	North Jeffrey	Gambia	✗ ▾
Young, Bowman and Caldwell	P10629485	East Monica	Uganda	✓ ▾
Goodman Group	E72358094	Jenniferland	Mexico	✓ ▾
Wilson Inc	A89994905	Port Andrew	Kazakhstan	✗ ▾
Francis Group	P49542624	Ericside	Latvia	✗ ▾
Estes and Sons	A51066336	Annetown	Mozambique	✓ ▾

The form includes the following fields:

- Active: Enables or disables the customer visibility.
- Name: Full name or business name of the customer.
- CIF: Customer's tax identification code.
- Address: Main physical or billing address.
- City: City or locality of the customer.
- Province / State: Province or state of the customer.
- ZIP: Postal code corresponding to the address.
- Country: Country of registration.
- Email: Email for notifications or invoices.
- Phone: Primary contact phone number.
- Website: Website of the customer
- Notes: Internal notes related to the customer.
- Type: Category the customer belongs to (e.g., regular, VIP).
- Files: Attachments such as documents or images related to the job.
- Notes: Internal observations or customer-specific instructions.

10.4 Delete

Records can be deleted from the list view via the delete action. A confirmation prompt will appear before the operation is executed.

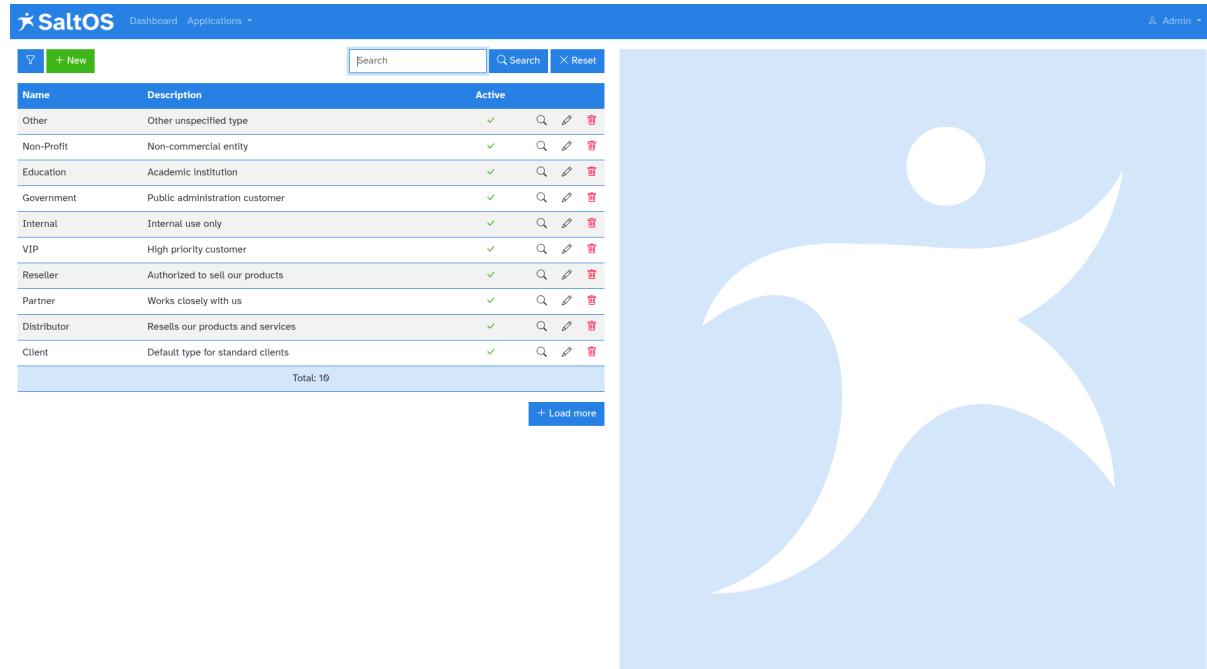
This action is irreversible and requires specific permissions.

11 Customer Types

11.1 Description

The Customer Types application allows you to define categories or segments for classifying customers. These types are used in the Customers module to group and organize clients according to their profile, purpose, or treatment. Examples may include "Individual", "Company", "VIP", or "Distributor".

11.2 List view



Name	Description	Active
Other	Other unspecified type	✓
Non-Profit	Non-commercial entity	✓
Education	Academic Institution	✓
Government	Public administration customer	✓
Internal	Internal use only	✓
VIP	High priority customer	✓
Reseller	Authorized to sell our products	✓
Partner	Works closely with us	✓
Distributor	Resells our products and services	✓
Client	Default type for standard clients	✓

Total: 10 [+ Load more](#)

The following fields are displayed in the list view:

- Name: The label of the customer type (e.g., Company, VIP).
- Description: Additional explanation of the type's purpose or scope.
- Active: Indicates whether the type is available for selection.

11.3 Form view

This view is used to create, view or edit customer type entries.

In **create** mode, the form is empty and ready to enter new data.

The screenshot shows the SaltOS application interface. On the left, there is a sidebar with a logo and navigation links: 'Dashboard', 'Applications', and 'Admin'. The main area has a title bar with the application name 'SaltOS' and a search bar. Below the search bar is a table with columns 'Name', 'Description', and 'Active'. The table lists ten entries: 'Other', 'Non-Profit', 'Education', 'Government', 'Internal', 'VIP', 'Reseller', 'Partner', 'Distributor', and 'Client'. Each entry has a green checkmark icon in the 'Active' column and edit/delete icons in the last column. A total count of '10' is shown at the bottom of the table. To the right of the table is a detailed view of the 'Other' record. It shows a radio button labeled 'Active', a 'Name' field containing 'Other', and a 'Description' field containing 'Other unspecified type'. At the bottom right are buttons for 'Create' (green) and 'Cancel' (red).

In **view** mode, the fields are filled with the selected record and cannot be edited.

This screenshot is similar to the previous one, showing the SaltOS application interface. The main difference is that the 'Info' button next to the 'Edit' and 'Delete' buttons is highlighted in blue, indicating that the record is in edit mode. The rest of the interface is identical to the view mode screenshot.

In **edit** mode, the form is pre-filled and allows modifications.

The screenshot shows the SaltOS Customer Types application interface. On the left, there is a list of customer types with columns for Name, Description, and Active status. The 'Active' column contains icons for enabling or disabling each type. The 'Name' column lists various categories like Other, Non-Profit, Education, etc. The 'Description' column provides a brief description for each type. A search bar at the top right allows filtering by name. On the right, a detailed view of the 'Other' customer type is shown. It includes fields for Name (set to 'Other'), Description ('Other unspecified type'), and an Active checkbox (which is checked). Below these fields are 'Save' and 'Cancel' buttons. At the bottom of the main list, there is a link to '+ Load more'.

The form includes the following fields:

- Active: Enables or disables the type for use in the Customers app.
- Name: Title of the customer type.
- Description: Optional note describing how or when to use this type.

11.4 Delete

Customer types can be deleted only if they are not assigned to any customer.

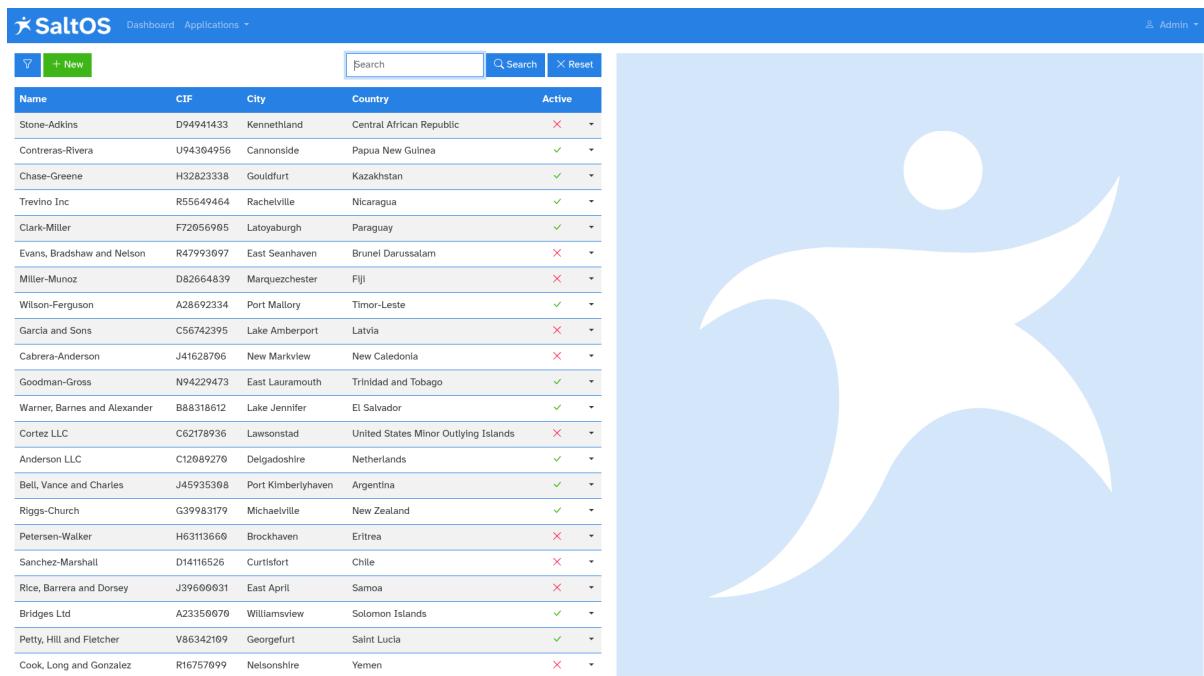
If in use, they should be deactivated instead to preserve consistency.

12 Leads

12.1 Description

The Leads application is used to register and track potential customers before they become actual clients. It allows you to collect key information about each lead, such as contact details, origin, and current status in the sales process. This module helps organize the pre-sales activity, enabling sales teams to follow up effectively, qualify opportunities, and convert leads into customers when appropriate.

12.2 List view



Name	CIF	City	Country	Active
Stone-Adkins	D9494133	Kennethland	Central African Republic	X ▾
Contreras-Rivera	U94364956	Cannonside	Papua New Guinea	✓ ▾
Chase-Greene	H32823338	Gouldfurt	Kazakhstan	✓ ▾
Trevino Inc	R55649464	Rachevilvill	Nicaragua	✓ ▾
Clark-Miller	F72056985	Latoyaburgh	Paraguay	✓ ▾
Evans, Bradshaw and Nelson	R47993097	East Seanhaven	Brunei Darussalam	X ▾
Miller-Munoz	D82664839	Marquezchester	Fiji	X ▾
Wilson-Ferguson	A28692334	Port Mallory	Timor-Leste	✓ ▾
Garcia and Sons	C56742395	Lake Amberport	Latvia	X ▾
Cabrera-Anderson	J41628766	New Markview	New Caledonia	X ▾
Goodman-Gross	N94229473	East Lauramouth	Trinidad and Tobago	✓ ▾
Warner, Barnes and Alexander	B88318612	Lake Jennifer	El Salvador	✓ ▾
Cortez LLC	C62178936	Lawsonstad	United States Minor Outlying Islands	X ▾
Anderson LLC	C12089270	Delgadoshire	Netherlands	✓ ▾
Bell, Vance and Charles	J45935368	Port Kimberlyhaven	Argentina	✓ ▾
Riggs-Church	G39983179	Michaelville	New Zealand	✓ ▾
Petersen-Walker	H63113660	Brockhaven	Eritrea	X ▾
Sanchez-Marshall	D14116526	Curtisfort	Chile	X ▾
Rice, Barrera and Dorsey	J39600031	East April	Samoa	X ▾
Bridges Ltd	A23356970	Williamsview	Solomon Islands	✓ ▾
Petty, Hill and Fletcher	V86342109	Georgefurt	Saint Lucia	✓ ▾
Cook, Long and Gonzalez	R16757699	Nelsonshire	Yemen	X ▾

The following fields are displayed in the list view:

- Title: The title or subject of the meeting, summarizing its purpose.
- Location: The place where the meeting is held, or the online platform link if virtual.
- Start Time: Scheduled starting date and time of the meeting.
- Customer: Customer associated with the meeting, if applicable.

12.3 Form view

This view is used for creating, editing or viewing a lead.

In **create** mode, the form is empty and ready to enter new data.

SaltOS Dashboard Applications Admin

Name	CIF	City	Country	Active
Stone-Adkins	D94941433	Kennethland	Central African Republic	<input checked="" type="checkbox"/> <input type="checkbox"/>
Contreras-Rivera	U94364956	Cannonside	Papua New Guinea	<input checked="" type="checkbox"/> <input type="checkbox"/>
Chase-Greene	H32823338	Gouldfurt	Kazakhstan	<input checked="" type="checkbox"/> <input type="checkbox"/>
Trevino Inc	R56494464	Rachelville	Nicaragua	<input checked="" type="checkbox"/> <input type="checkbox"/>
Clark-Miller	F72056995	Latoyaburgh	Paraguay	<input checked="" type="checkbox"/> <input type="checkbox"/>
Evans, Bradshaw and Nelson	R47993097	East Seanhaven	Brunei Darussalam	<input checked="" type="checkbox"/> <input type="checkbox"/>
Miller-Munoz	D82664839	Marquezchester	Fiji	<input checked="" type="checkbox"/> <input type="checkbox"/>
Wilson-Ferguson	A28692334	Port Mallory	Timor-Leste	<input checked="" type="checkbox"/> <input type="checkbox"/>
Garcia and Sons	C56742395	Lake Amberport	Latvia	<input checked="" type="checkbox"/> <input type="checkbox"/>
Cabrera-Anderson	J41628766	New Markview	New Caledonia	<input checked="" type="checkbox"/> <input type="checkbox"/>
Goodman-Gross	N94229473	East Lauramouth	Trinidad and Tobago	<input checked="" type="checkbox"/> <input type="checkbox"/>
Warner, Barnes and Alexander	B88318612	Lake Jennifer	El Salvador	<input checked="" type="checkbox"/> <input type="checkbox"/>
Cortez LLC	C62178936	Lawsonstad	United States Minor Outlying Islands	<input checked="" type="checkbox"/> <input type="checkbox"/>
Anderson LLC	C12089270	Delgadoshire	Netherlands	<input checked="" type="checkbox"/> <input type="checkbox"/>
Bell, Vance and Charles	J45935308	Port Kimberlyhaven	Argentina	<input checked="" type="checkbox"/> <input type="checkbox"/>
Riggs-Church	G39983179	Michaelville	New Zealand	<input checked="" type="checkbox"/> <input type="checkbox"/>
Petersen-Walker	H63113660	Brockhaven	Eritrea	<input checked="" type="checkbox"/> <input type="checkbox"/>
Sanchez-Marshall	D14116526	Curtisfort	Chile	<input checked="" type="checkbox"/> <input type="checkbox"/>
Rice, Barrera and Dorsey	J39600031	East April	Samoa	<input checked="" type="checkbox"/> <input type="checkbox"/>
Bridges Ltd	A23350670	Williamsview	Solomon Islands	<input checked="" type="checkbox"/> <input type="checkbox"/>
Petty, Hill and Fletcher	V86342109	Georgefurt	Saint Lucia	<input checked="" type="checkbox"/> <input type="checkbox"/>
Cook, Long and Gonzalez	R16757699	Nelsonshire	Yemen	<input checked="" type="checkbox"/> <input type="checkbox"/>

Active CIF
Name Address City Province / State
Zip Country
Email Phone Website
Notes
Contact Source Status Assigned To
New files
New note

In **view** mode, the fields are filled with the selected record and cannot be edited.

SaltOS Dashboard Applications Admin

Name	CIF	City	Country	Active
Stone-Adkins	D94941433	Kennethland	Central African Republic	<input checked="" type="checkbox"/> <input type="checkbox"/>
Contreras-Rivera	U94364956	Cannonside	Papua New Guinea	<input checked="" type="checkbox"/> <input type="checkbox"/>
Chase-Greene	H32823338	Gouldfurt	Kazakhstan	<input checked="" type="checkbox"/> <input type="checkbox"/>
Trevino Inc	R56494464	Rachelville	Nicaragua	<input checked="" type="checkbox"/> <input type="checkbox"/>
Clark-Miller	F72056995	Latoyaburgh	Paraguay	<input checked="" type="checkbox"/> <input type="checkbox"/>
Evans, Bradshaw and Nelson	R47993097	East Seanhaven	Brunei Darussalam	<input checked="" type="checkbox"/> <input type="checkbox"/>
Miller-Munoz	D82664839	Marquezchester	Fiji	<input checked="" type="checkbox"/> <input type="checkbox"/>
Wilson-Ferguson	A28692334	Port Mallory	Timor-Leste	<input checked="" type="checkbox"/> <input type="checkbox"/>
Garcia and Sons	C56742395	Lake Amberport	Latvia	<input checked="" type="checkbox"/> <input type="checkbox"/>
Cabrera-Anderson	J41628766	New Markview	New Caledonia	<input checked="" type="checkbox"/> <input type="checkbox"/>
Goodman-Gross	N94229473	East Lauramouth	Trinidad and Tobago	<input checked="" type="checkbox"/> <input type="checkbox"/>
Warner, Barnes and Alexander	B88318612	Lake Jennifer	El Salvador	<input checked="" type="checkbox"/> <input type="checkbox"/>
Cortez LLC	C62178936	Lawsonstad	United States Minor Outlying Islands	<input checked="" type="checkbox"/> <input type="checkbox"/>
Anderson LLC	C12089270	Delgadoshire	Netherlands	<input checked="" type="checkbox"/> <input type="checkbox"/>
Bell, Vance and Charles	J45935308	Port Kimberlyhaven	Argentina	<input checked="" type="checkbox"/> <input type="checkbox"/>
Riggs-Church	G39983179	Michaelville	New Zealand	<input checked="" type="checkbox"/> <input type="checkbox"/>
Petersen-Walker	H63113660	Brockhaven	Eritrea	<input checked="" type="checkbox"/> <input type="checkbox"/>
Sanchez-Marshall	D14116526	Curtisfort	Chile	<input checked="" type="checkbox"/> <input type="checkbox"/>
Rice, Barrera and Dorsey	J39600031	East April	Samoa	<input checked="" type="checkbox"/> <input type="checkbox"/>
Bridges Ltd	A23350670	Williamsview	Solomon Islands	<input checked="" type="checkbox"/> <input type="checkbox"/>
Petty, Hill and Fletcher	V86342109	Georgefurt	Saint Lucia	<input checked="" type="checkbox"/> <input type="checkbox"/>
Cook, Long and Gonzalez	R16757699	Nelsonshire	Yemen	<input checked="" type="checkbox"/> <input type="checkbox"/>

Active CIF
Name Address City Province / State
Zip Country
Email Phone Website
Notes
Contact Source Status Assigned To

In **edit** mode, the form is pre-filled and allows modifications.

The screenshot shows two main sections of the SaltOS application. On the left, there is a table listing various customers with columns for Name, CIF, City, Country, and Active status. On the right, there is a detailed view of a specific customer record for 'Stone-Adkins' with fields for Name, CIF, Address, City, Province / State, Zip, Country, Email, Phone, Website, Notes, Contact, Source, Status, Assigned To, New files, and New note. At the bottom right of the form, there are 'Save' and 'Cancel' buttons.

Name	CIF	City	Country	Active
Stone-Adkins	D94941433	Kennethland	Central African Republic	<input checked="" type="checkbox"/> <input type="checkbox"/>
Contreras-Rivera	U94364956	Cannonside	Papua New Guinea	<input checked="" type="checkbox"/> <input type="checkbox"/>
Chase-Greene	H32823338	Gouldfurt	Kazakhstan	<input checked="" type="checkbox"/> <input type="checkbox"/>
Trevino Inc	R56494464	Rachelville	Nicaragua	<input checked="" type="checkbox"/> <input type="checkbox"/>
Clark-Miller	F72056905	Latoyaburgh	Paraguay	<input checked="" type="checkbox"/> <input type="checkbox"/>
Evans, Bradshaw and Nelson	R47993697	East Seanhaven	Brunel Darussalam	<input checked="" type="checkbox"/> <input type="checkbox"/>
Miller-Munoz	D82664839	Marquezchester	Fiji	<input checked="" type="checkbox"/> <input type="checkbox"/>
Wilson-Ferguson	A28692334	Port Mallory	Timor-Leste	<input checked="" type="checkbox"/> <input type="checkbox"/>
Garcia and Sons	C56742395	Lake Amberport	Latvia	<input checked="" type="checkbox"/> <input type="checkbox"/>
Cabrera-Anderson	J41628766	New Markview	New Caledonia	<input checked="" type="checkbox"/> <input type="checkbox"/>
Goodman-Gross	N94229473	East Lauramouth	Trinidad and Tobago	<input checked="" type="checkbox"/> <input type="checkbox"/>
Warner, Barnes and Alexander	B88318612	Lake Jennifer	El Salvador	<input checked="" type="checkbox"/> <input type="checkbox"/>
Cortez LLC	C62178936	Lawsonstad	United States Minor Outlying Islands	<input checked="" type="checkbox"/> <input type="checkbox"/>
Anderson LLC	C12089279	Delgadoshire	Netherlands	<input checked="" type="checkbox"/> <input type="checkbox"/>
Bell, Vance and Charles	J45935308	Port Kimberlyhaven	Argentina	<input checked="" type="checkbox"/> <input type="checkbox"/>
Riggs-Church	G39983179	Michaelville	New Zealand	<input checked="" type="checkbox"/> <input type="checkbox"/>
Petersen-Walker	H63113660	Brockhaven	Eritrea	<input checked="" type="checkbox"/> <input type="checkbox"/>
Sanchez-Marshall	D14116526	Curtisfort	Chile	<input checked="" type="checkbox"/> <input type="checkbox"/>
Rice, Barrera and Dorsey	J39600031	East April	Samoa	<input checked="" type="checkbox"/> <input type="checkbox"/>
Bridges Ltd	A23350070	Williamsview	Solomon Islands	<input checked="" type="checkbox"/> <input type="checkbox"/>
Petty, Hill and Fletcher	V86342109	Georgefurt	Saint Lucia	<input checked="" type="checkbox"/> <input type="checkbox"/>
Cook, Long and Gonzalez	R16757099	Nelsonshire	Yemen	<input checked="" type="checkbox"/> <input type="checkbox"/>

The form includes the following fields:

- Title: The title or subject of the meeting, summarizing its purpose.
- Location: The place where the meeting is held, or the online platform link if virtual.
- Start Time: Scheduled starting date and time of the meeting.
- End Time: Planned ending date and time of the meeting.
- Related Customer: Customer associated with the meeting, if applicable.
- Participants: List of users or external contacts invited to the meeting.
- Agenda: The topics or plan intended to be covered during the meeting.
- Topics Approved: Items discussed in the meeting that were approved.
- Topics Rejected: Items discussed that were not approved or postponed.
- Topics Pending: Items discussed that require further action or decision.

12.4 Delete

Records can be deleted from the list view via the delete action. A confirmation prompt will appear before the operation is executed.

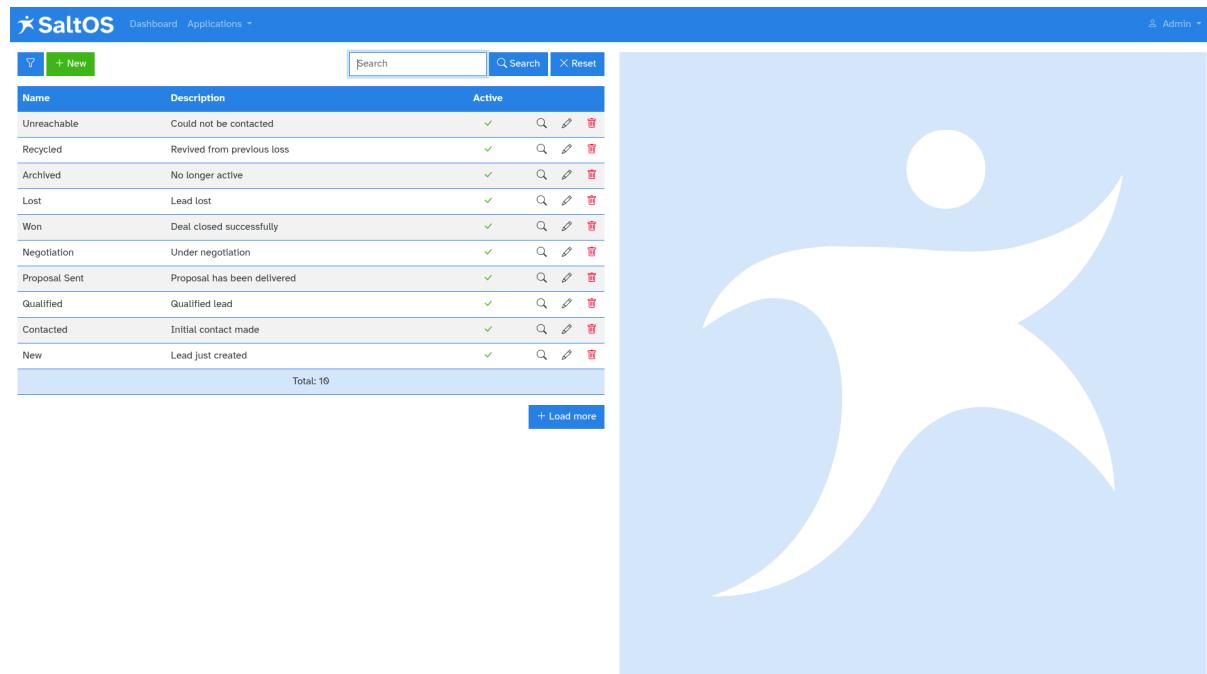
This action is irreversible and requires appropriate permissions.

13 Leads Status

13.1 Description

The Leads Status application defines the possible stages or states of a lead during the qualification process. These statuses are used in the Leads module to track the sales funnel and organize follow-up efforts. Typical statuses might include "New", "Contacted", "Qualified", or "Rejected".

13.2 List view



Name	Description	Active
Unreachable	Could not be contacted	✓
Recycled	Revived from previous loss	✓
Archived	No longer active	✓
Lost	Lead lost	✓
Won	Deal closed successfully	✓
Negotiation	Under negotiation	✓
Proposal Sent	Proposal has been delivered	✓
Qualified	Qualified lead	✓
Contacted	Initial contact made	✓
New	Lead just created	✓

Total: 10 [+ Load more](#)

The following fields are displayed in the list view:

- Name: The label of the lead status (e.g., Contacted, Qualified).
- Description: Explanation or criteria for using this status.
- Active: Indicates if the status is currently available for selection.

13.3 Form view

This view is used to create, view or edit lead status records.

In **create** mode, the form is empty and ready to enter new data.

The screenshot shows the SaltOS application interface. On the left, there is a sidebar with a logo and navigation links: Dashboard, Applications, and Admin. The main area has a blue header bar with the SaltOS logo, a search bar, and buttons for 'Search', 'Reset', and 'Active' status. Below the header is a table with columns: Name, Description, and Active. The table lists ten lead statuses: Unreachable, Recycled, Archived, Lost, Won, Negotiation, Proposal Sent, Qualified, Contacted, and New. Each row includes a green checkmark icon, a search icon, an edit icon, and a delete icon. A total count of 10 is displayed at the bottom of the table. To the right of the table is a detailed view form for 'Unreachable'. It has fields for 'Name' (containing 'Unreachable') and 'Description' (containing 'Could not be contacted'). There is also a 'Info' button with a dropdown arrow, and buttons for 'Edit', 'Delete', and 'Close'.

Name	Description	Active
Unreachable	Could not be contacted	✓
Recycled	Revived from previous loss	✓
Archived	No longer active	✓
Lost	Lead lost	✓
Won	Deal closed successfully	✓
Negotiation	Under negotiation	✓
Proposal Sent	Proposal has been delivered	✓
Qualified	Qualified lead	✓
Contacted	Initial contact made	✓
New	Lead just created	✓

Total: 10

+ Load more

In **view** mode, the fields are filled with the selected record and cannot be edited.

This screenshot is similar to the one above, showing the SaltOS application interface. The main difference is that the 'Edit' mode is active for the 'Unreachable' lead status. The 'Name' field contains 'Unreachable' and the 'Description' field contains 'Could not be contacted'. The 'Info' button is open, showing a dropdown menu. The 'Edit', 'Delete', and 'Close' buttons are visible at the bottom right of the form.

Name	Description	Active
Unreachable	Could not be contacted	✓
Recycled	Revived from previous loss	✓
Archived	No longer active	✓
Lost	Lead lost	✓
Won	Deal closed successfully	✓
Negotiation	Under negotiation	✓
Proposal Sent	Proposal has been delivered	✓
Qualified	Qualified lead	✓
Contacted	Initial contact made	✓
New	Lead just created	✓

Total: 10

+ Load more

In **edit** mode, the form is pre-filled and allows modifications.

Name	Description	Active
Unreachable	Could not be contacted	<input checked="" type="checkbox"/>
Recycled	Revived from previous loss	<input checked="" type="checkbox"/>
Archived	No longer active	<input checked="" type="checkbox"/>
Lost	Lead lost	<input checked="" type="checkbox"/>
Won	Deal closed successfully	<input checked="" type="checkbox"/>
Negotiation	Under negotiation	<input checked="" type="checkbox"/>
Proposal Sent	Proposal has been delivered	<input checked="" type="checkbox"/>
Qualified	Qualified lead	<input checked="" type="checkbox"/>
Contacted	Initial contact made	<input checked="" type="checkbox"/>
New	Lead just created	<input checked="" type="checkbox"/>

Total: 10 [+ Load more](#)

The form includes the following fields:

- Active: Controls whether the status appears in dropdowns.
- Name: Title of the status as shown in the Leads app.
- Description: Internal guidance for when to use this status.

13.4 Delete

Lead statuses can only be deleted if no leads are currently assigned to them.

Otherwise, the status should be marked as inactive.

14 Meetings

14.1 Description

The Meetings application allows you to schedule, organize, and track meetings with leads, customers, or internal staff. It supports planning both face-to-face and online meetings, storing relevant details such as date, time, participants, notes, and status. This module is essential for keeping a history of client interactions, improving follow-up, and maintaining team coordination.

14.2 List view

Title	Location	Start Time	Customer
Optimized bifurcated capability	Robertfurt	2024-06-16 10:10:12	Murphy, Glenn and Perez
Realigned incremental forecast	Lake Alexander	2024-05-07 12:03:54	Collins, Martinez and Chambers
Down-sized leadinglead edge algorithm	Port Erika	2024-04-22 11:57:23	Brown LLC
Open-source needs-based access	Codyville	2025-01-05 17:02:03	Summers Ltd
Customizable optimizing process Improvement	Richardsonmouth	2025-01-11 15:43:24	Brown Ltd
Decentralized fault-tolerant budgetary management	Julieview	2025-03-30 03:27:01	Sandoval, Kim and Shea
Digitized zero-defect neural-net	West David	2024-08-25 08:30:42	Day, Munoz and Ferguson
Intuitive dynamic encryption	East Garymouth	2024-10-23 18:29:51	Holder Inc
Diverse actuating support	Angelaberg	2024-05-03 00:56:33	Harrison-Medina
Stand-alone optimizing array	Kellermouth	2024-08-28 11:49:54	Scott Group
Re-engineered multi-state paradigm	Markland	2025-02-17 18:56:15	Dennis-Casey
Implemented Incremental ability	Lake Michael	2025-04-01 20:10:52	Wang-Miller
Cross-platform needs-based open system	Joshuaeville	2024-09-18 18:55:34	Estes and Sons
Optimized context-sensitive framework	Joelhaven	2024-12-04 14:04:41	Erickson-Rocha

The following fields are displayed in the list view:

- Title: The title or subject of the meeting, summarizing its purpose.
- Location: The place where the meeting is held, or the online platform link if virtual.
- Start Time: Scheduled starting date and time of the meeting.
- Customer: Customer associated with the meeting, if applicable.

14.3 Form view

This view is used for creating, editing or viewing a meeting entry.

In **create** mode, a new meeting is scheduled.

SaltOS Dashboard Applications ▾ Admin ▾

Title				Location	Start Time	Customer
<input type="checkbox"/>	Optimized bifurcated capability	Robertfurt	2024-06-16 10:16:12	Murphy, Glenn and Perez		
<input type="checkbox"/>	Realigned incremental forecast	Lake Alexander	2024-05-07 12:03:54	Collins, Martinez and Chambers		
<input type="checkbox"/>	Down-sized leadingedge algorithm	Port Erika	2024-04-22 11:57:23	Brown LLC		
<input type="checkbox"/>	Open-source needs-based access	Codyville	2025-01-05 17:02:03	Summers Ltd		
<input type="checkbox"/>	Customizable optimizing process improvement	Richardsonmouth	2025-01-11 15:43:24	Brown Ltd		
<input type="checkbox"/>	Decentralized fault-tolerant budgetary management	Julieview	2025-03-30 03:27:91	Sandoval, Kim and Shea		
<input type="checkbox"/>	Digitized zero-defect neural-net	West David	2024-08-25 08:36:42	Day, Munoz and Ferguson		
<input type="checkbox"/>	Intuitive dynamic encryption	East Garymouth	2024-10-23 18:29:51	Holder Inc		
<input type="checkbox"/>	Diverse actuating support	Angelaberg	2024-05-03 09:56:33	Harrison-Medina		
<input type="checkbox"/>	Stand-alone optimizing array	Kellermouth	2024-08-28 11:49:54	Scott Group		
<input type="checkbox"/>	Re-engineered multi-state paradigm	Markland	2025-02-17 18:58:15	Dennis-Casey		
<input type="checkbox"/>	Implemented incremental ability	Lake Michael	2025-04-01 20:10:52	Wang-Miller		
<input type="checkbox"/>	Cross-platform needs-based open system	Joshuaville	2024-08-18 18:55:34	Estes and Sons		
<input type="checkbox"/>	Optimized context-sensitive framework	Joelhaven	2024-12-04 14:04:41	Erickson-Rocha		

Title: Optimized bifurcated capability
 Location: Robertfurt
 Start Time: 06/16/2024, 10:16:12 AM
 End Time: 06/16/2024, 12:10:12 PM
 Related Customer: Murphy, Glenn and Perez
 Participants: Brian Good, Rhonda Brown, Brittany Carter
 Agenda: Carry wall include child break. Kitchen number language standard culture production purpose. Prepare hot box class force office. Onto house note consumer question.
 Topics Approved: Himself out recent full. Religious history wrong require.
 Topics Rejected: Wonder dream me above work. Participant thank big trip example conference head. Around someone necessary evidence front. Order claim mind want artist.
 Topics Pending: Cup be by anyone bad executive bit. Book us even. Guy father chair analysis popular student decade three.
 New files: Choose Files (No file chosen)
 New note:
 ✓ Create ✖ Cancel

In **view** mode, details are shown read-only for reference or audit.

SaltOS Dashboard Applications ▾ Admin ▾

Title				Location	Start Time	Customer
<input type="checkbox"/>	Optimized bifurcated capability	Robertfurt	2024-06-16 10:16:12	Murphy, Glenn and Perez		
<input type="checkbox"/>	Realigned incremental forecast	Lake Alexander	2024-05-07 12:03:54	Collins, Martinez and Chambers		
<input type="checkbox"/>	Down-sized leadingedge algorithm	Port Erika	2024-04-22 11:57:23	Brown LLC		
<input type="checkbox"/>	Open-source needs-based access	Codyville	2025-01-05 17:02:03	Summers Ltd		
<input type="checkbox"/>	Customizable optimizing process improvement	Richardsonmouth	2025-01-11 15:43:24	Brown Ltd		
<input type="checkbox"/>	Decentralized fault-tolerant budgetary management	Julieview	2025-03-30 03:27:91	Sandoval, Kim and Shea		
<input type="checkbox"/>	Digitized zero-defect neural-net	West David	2024-08-25 08:36:42	Day, Munoz and Ferguson		
<input type="checkbox"/>	Intuitive dynamic encryption	East Garymouth	2024-10-23 18:29:51	Holder Inc		
<input type="checkbox"/>	Diverse actuating support	Angelaberg	2024-05-03 09:56:33	Harrison-Medina		
<input type="checkbox"/>	Stand-alone optimizing array	Kellermouth	2024-08-28 11:49:54	Scott Group		
<input type="checkbox"/>	Re-engineered multi-state paradigm	Markland	2025-02-17 18:58:15	Dennis-Casey		
<input type="checkbox"/>	Implemented incremental ability	Lake Michael	2025-04-01 20:10:52	Wang-Miller		
<input type="checkbox"/>	Cross-platform needs-based open system	Joshuaville	2024-08-18 18:55:34	Estes and Sons		
<input type="checkbox"/>	Optimized context-sensitive framework	Joelhaven	2024-12-04 14:04:41	Erickson-Rocha		

Title: Optimized bifurcated capability
 Location: Robertfurt
 Start Time: 06/16/2024, 10:16:12 AM
 End Time: 06/16/2024, 12:10:12 PM
 Related Customer: Murphy, Glenn and Perez
 Participants: Brian Good, Rhonda Brown, Brittany Carter
 Agenda: Carry wall include child break. Kitchen number language standard culture production purpose. Prepare hot box class force office. Onto house note consumer question.
 Topics Approved: Himself out recent full. Religious history wrong require.
 Topics Rejected: Wonder dream me above work. Participant thank big trip example conference head. Around someone necessary evidence front. Order claim mind want artist.
 Topics Pending: Cup be by anyone bad executive bit. Book us even. Guy father chair analysis popular student decade three.
 New files: Info ▾ PDF ▾
 New note:
 ✓ Edit ✖ Delete ✖ Close

In **edit** mode, the meeting details can be modified if needed.

The form includes the following fields:

- Title: The title or subject of the meeting, summarizing its purpose.
- Location: The place where the meeting is held, or the online platform link if virtual.
- Start Time: Scheduled starting date and time of the meeting.
- End Time: Planned ending date and time of the meeting.
- Related Customer: Customer associated with the meeting, if applicable.
- Participants: List of users or external contacts invited to the meeting.
- Agenda: The topics or plan intended to be covered during the meeting.
- Topics Approved: Items discussed in the meeting that were approved.
- Topics Rejected: Items discussed that were not approved or postponed.
- Topics Pending: Items discussed that require further action or decision.

14.4 Delete

Meetings can be deleted from the list view if created in error or no longer relevant.

Records are usually kept for historical traceability unless explicit removal is needed.

15 Quotes

15.1 Description

The Quotes application is used to create and manage commercial proposals sent to customers. Each quote contains line items with products or services, pricing, taxes, and conditions. This module is tightly integrated

with Customers and Products, and allows for tracking the status of each quote (e.g., Draft, Sent, Accepted). When a quote is accepted, it can be converted into an invoice.

15.2 List view

Customer	CIF	Quote	Date	Total
□ SaltOS Solutions SL	B12345678	Q2025-0100	2025-03-01	713.36
□ SaltOS Solutions SL	B12345678	Q2025-0099	2025-03-06	6048.39
□ SaltOS Solutions SL	B12345678	Q2025-0098	2025-03-07	794.72
□ SaltOS Solutions SL	B12345678	Q2025-0097	2025-04-13	1545.49
□ SaltOS Solutions SL	B12345678	Q2025-0096	2025-04-05	241.76
□ SaltOS Solutions SL	B12345678	Q2025-0095	2025-03-12	23356.9
□ SaltOS Solutions SL	B12345678	Q2025-0094	2025-02-19	3372.8
□ SaltOS Solutions SL	B12345678	Q2025-0093	2025-04-13	13212.8
□ SaltOS Solutions SL	B12345678	Q2025-0092	2025-03-11	4714.34
□ SaltOS Solutions SL	B12345678	Q2025-0091	2025-02-18	2559.37
□ SaltOS Solutions SL	B12345678	Q2025-0090	2025-03-16	23097.4
□ SaltOS Solutions SL	B12345678	Q2025-0089	2025-03-26	21215.8
□ SaltOS Solutions SL	B12345678	Q2025-0088	2025-04-08	27171.4
□ SaltOS Solutions SL	B12345678	Q2025-0087	2025-03-28	19128.7
□ SaltOS Solutions SL	B12345678	Q2025-0086	2025-04-16	8918.35
□ SaltOS Solutions SL	B12345678	Q2025-0085	2025-03-03	10145.4
□ SaltOS Solutions SL	B12345678	Q2025-0084	2025-02-18	3666.7
□ SaltOS Solutions SL	B12345678	Q2025-0083	2025-03-18	5862.41
□ SaltOS Solutions SL	B12345678	Q2025-0082	2025-03-18	321.41
□ SaltOS Solutions SL	B12345678	Q2025-0081	2025-03-18	26614.7
□ SaltOS Solutions SL	B12345678	Q2025-0080	2025-03-14	5335.02
□ SaltOS Solutions SL	B12345678	Q2025-0079	2025-03-08	15277.3

The following fields are displayed in the list view:

- Customer: The client to whom the quote is addressed.
- CIF: The customer's tax identification code (e.g., VAT, CIF, NIF).
- Quote: The internal reference or code used to identify the quote.
- Date: The official date the quote was created or issued.
- Total: The total monetary value of the quote, including all taxes and discounts.

15.3 Form view

This view is used for creating, editing or viewing a quote.

In **create** mode, the form is empty and allows you to build a new quote.

SaltOS Dashboard Applications Admin

Customer		CIF	Quote	Date	Total
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0100	2025-03-01	713.36
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0099	2025-03-06	6048.39
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0098	2025-03-07	794.72
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0097	2025-04-13	1545.49
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0096	2025-04-05	241.76
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0095	2025-03-12	23356.9
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0094	2025-02-19	3372.8
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0093	2025-04-13	13212.8
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0092	2025-03-11	4714.34
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0091	2025-02-18	2550.37
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0090	2025-03-16	2397.4
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0089	2025-03-26	21215.8
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0088	2025-04-08	27171.4
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0087	2025-03-28	19128.7
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0086	2025-04-16	8918.35
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0085	2025-03-03	10145.4
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0084	2025-02-18	3666.7
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0083	2025-03-18	5062.41
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0082	2025-03-18	321.41
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0081	2025-03-18	26614.7
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0080	2025-03-14	5335.62
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0079	2025-03-08	15277.3

Quote: Q2025-0100 Date: 03/01/2025

Customer: SaltOS Solutions SL CIF: B12345678

Address: Calle Ficticia 123, 3rd City: Barcelona Province / State: Barcelona

Zip: 08001 Country: Spain

Notes: Leader treat contain notice hour watch. Those citizen think Mrs project. Recently reveal describe management. Building hard sense mean single Improve close.

Concepts:

Description	Quantity	Price	Discount	Tax	Total
architect revolutionary bandwidth	5.66	104.16	0	21	589.55

Taxes:

Tax	Base	Total	Subtotal	Tax	Total
IVA 21%	589.55	123.81	589.55	123.81	713.36

Payment method: Gift Card Valid until: 04/15/2025 Status: Draft

Buttons: Info PDF Edit Delete Close

In **view** mode, it displays a finalized quote without editing capabilities.

SaltOS Dashboard Applications Admin

Customer		CIF	Quote	Date	Total
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0100	2025-03-01	713.36
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0099	2025-03-06	6048.39
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0098	2025-03-07	794.72
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0097	2025-04-13	1545.49
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0096	2025-04-05	241.76
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0095	2025-03-12	23356.9
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0094	2025-02-19	3372.8
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0093	2025-04-13	13212.8
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0092	2025-03-11	4714.34
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0091	2025-02-18	2550.37
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0090	2025-03-16	2397.4
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0089	2025-03-26	21215.8
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0088	2025-04-08	27171.4
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0087	2025-03-28	19128.7
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0086	2025-04-16	8918.35
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0085	2025-03-03	10145.4
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0084	2025-02-18	3666.7
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0083	2025-03-18	5062.41
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0082	2025-03-18	321.41
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0081	2025-03-18	26614.7
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0080	2025-03-14	5335.62
<input type="checkbox"/>	SaltOS Solutions SL	B12345678	Q2025-0079	2025-03-08	15277.3

Quote: Q2025-0100 Date: 03/01/2025

Customer: SaltOS Solutions SL CIF: B12345678

Address: Calle Ficticia 123, 3rd City: Barcelona Province / State: Barcelona

Zip: 08001 Country: Spain

Notes: Leader treat contain notice hour watch. Those citizen think Mrs project. Recently reveal describe management. Building hard sense mean single Improve close.

Concepts:

Description	Quantity	Price	Discount	Tax	Total
architect revolutionary bandwidth	5.66	104.16	0	21	589.55

Taxes:

Tax	Base	Total	Subtotal	Tax	Total
IVA 21%	589.55	123.81	589.55	123.81	713.36

Payment method: Gift Card Valid until: 04/15/2025 Status: Draft

Buttons: Info PDF Edit Delete Close

In **edit** mode, it shows a draft quote ready for modification.

The screenshot shows a quote creation form in the SaltOS application. The form includes the following fields:

- Quote:** Q2025-6190
- Date:** 03/01/2025
- Customer:** SaltOS Solutions SL
- CIF:** B12345678
- Address:** Calle Ficticia 123, 3^A
- City:** Barcelona
- Province / State:** Barcelona
- Zip:** 08001
- Country:** Spain
- Notes:** Leader treat contain notice hour watch. Those citizen think Mrs project. Recently reveal describe management. Building hard sense mean single improve close.
- Concepts:** architect revolutionary bandwidth (Quantity: 5.66, Price: 104.16, Discount: 0, Tax: 21, Total: 589.55)
- Taxes:** IVA 21% (Base: 589.55, Total: 123.81)
- Totals:** Subtotal: 589.55, Tax: 123.81, Total: 713.36
- Payment method:** Gift Card
- Valid until:** 04/15/2025
- Status:** Draft
- New files:** Choose Files (No file chosen)
- New note:** (Empty text area)

At the bottom right, there are buttons for **✓ Save** and **✗ Cancel**.

The form includes the following fields:

- **Quote:** The internal reference or code used to identify the quote.
- **Date:** The official date the quote was created or issued.
- **Customer:** The client to whom the quote is addressed.
- **CIF:** The customer's tax identification code (e.g., VAT, CIF, NIF).
- **Address:** The customer's address at the time of issuing the quote.
- **City:** The city associated with the customer in the quote.
- **Province / State:** The region or state linked to the customer's location.
- **Zip:** The postal code of the customer's address.
- **Country:** The customer's country of residence or business.
- **Notes:** Additional internal notes or observations attached to the quote.
- **Concepts:** The list of products or services included in the quote.
- **Taxes:** Breakdown of applicable taxes for the quoted items.
- **Totals:** Subtotal, taxes, and final amount displayed in a structured summary.
- **Payment method:** The selected method for payment if the quote is accepted.
- **Valid until:** The expiration date until which the quote remains valid.
- **Status:** The current lifecycle state of the quote (e.g., draft, sent, accepted).

Quote lines are also included as a subtable, where each line contains product, quantity, price, tax, and discount.

15.4 Delete

Quotes can be deleted from the list view if they are not yet accepted. A confirmation prompt will appear before deletion.

This action is irreversible and subject to user permissions.

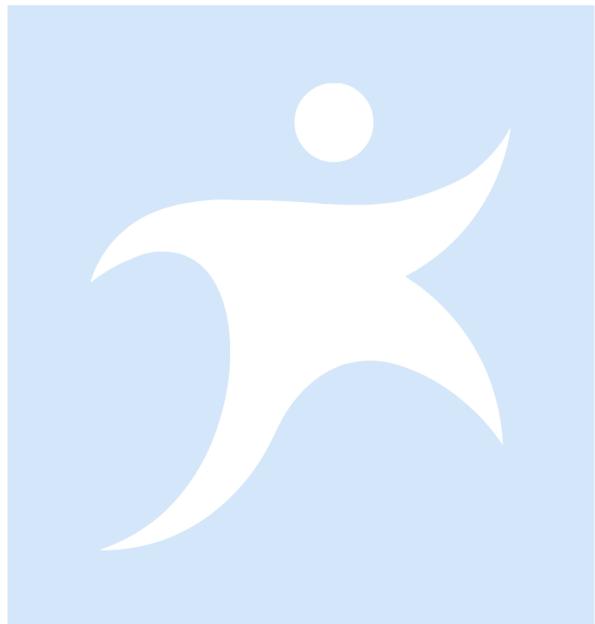
16 Quotes Status

16.1 Description

The Quotes Status application is used to define the different states that a sales quote can have during its lifecycle. These statuses help sales teams track progress, filter records, and identify which quotes are active, accepted, rejected, or archived.

Examples of common statuses include "Draft", "Sent", "Accepted", and "Declined".

16.2 List view



Name	Description	Active	Actions
Closed	Closed without result	✓	🔍 🔍 🗑
Converted	Converted to invoice	✓	🔍 🔍 🗑
Reviewed	Reviewed by manager	✓	🔍 🔍 🗑
Pending	Awaiting response	✓	🔍 🔍 🗑
Cancelled	Manually cancelled	✓	🔍 🔍 🗑
Expired	Quote validity expired	✓	🔍 🔍 🗑
Rejected	Customer rejected the quote	✓	🔍 🔍 🗑
Accepted	Customer accepted the quote	✓	🔍 🔍 🗑
Sent	Quote sent to customer	✓	🔍 🔍 🗑
Draft	Quote in preparation	✓	🔍 🔍 🗑

The following fields are displayed in the list view:

- Name: Label of the status (e.g., Draft, Accepted).
- Description: Explanation of when this status is applied.
- Active: Indicates whether the status is selectable in the Quotes module.

16.3 Form view

This view is used to create, view or edit quote status entries.

In **create** mode, the form is empty and allows you to build a new quote.

The screenshot shows the SaltOS application interface. At the top, there is a blue header bar with the SaltOS logo, a navigation menu with 'Dashboard' and 'Applications', and a user dropdown. Below the header is a search bar with 'Search', 'Q Search', and 'Reset' buttons. To the right of the search bar is a 'Active' toggle switch. On the left, there is a table with columns 'Name' and 'Description'. The table lists various quote statuses: Closed, Converted, Reviewed, Pending, Cancelled, Expired, Rejected, Accepted, Sent, and Draft. Each row has a green checkmark icon, a search icon, an edit icon, and a delete icon. A 'Total: 10' message is at the bottom of the table. To the right of the table is a form for creating a new quote. It has fields for 'Name' (with a placeholder 'Closed') and 'Description' (with a placeholder 'Closed without result'). Below the form are 'Create' and 'Cancel' buttons. At the bottom right of the page are 'Load more' and 'Info' buttons.

In **view** mode, it displays a finalized quote without editing capabilities.

The screenshot shows the SaltOS application interface. The layout is identical to the create mode screenshot above, with the same header, search bar, and table of quote statuses. However, the 'Name' field in the form on the right is now populated with 'Closed', and the 'Description' field is also populated with 'Closed without result'. The 'Edit' and 'Delete' buttons are visible at the bottom right of the form area.

In **edit** mode, it shows a draft quote ready for modification.

The screenshot shows the SaltOS application interface. On the left, there is a list of quote statuses with columns for Name, Description, and Active. The 'Active' column contains a toggle switch, a checkmark, a search icon, and edit/cancel icons. The 'Name' column lists various status types like Closed, Converted, Reviewed, Pending, etc. The 'Description' column provides a brief explanation for each status. A search bar at the top right allows filtering by name. On the right, a detailed view of the 'Closed' status is shown. It includes a 'Name' field with 'Closed' typed in, a 'Description' field with 'Closed without result', and two buttons at the bottom right: a green 'Save' button and a red 'Cancel' button.

Name	Description	Active
Closed	Closed without result	<input checked="" type="checkbox"/>
Converted	Converted to invoice	<input checked="" type="checkbox"/>
Reviewed	Reviewed by manager	<input checked="" type="checkbox"/>
Pending	Awaiting response	<input checked="" type="checkbox"/>
Cancelled	Manually cancelled	<input checked="" type="checkbox"/>
Expired	Quote validity expired	<input checked="" type="checkbox"/>
Rejected	Customer rejected the quote	<input checked="" type="checkbox"/>
Accepted	Customer accepted the quote	<input checked="" type="checkbox"/>
Sent	Quote sent to customer	<input checked="" type="checkbox"/>
Draft	Quote in preparation	<input checked="" type="checkbox"/>

Total: 10 [+ Load more](#)

The form includes the following fields:

- Active: Toggles the visibility of this status in dropdowns.
- Name: Name of the status as it appears in the interface.
- Description: Optional explanation for internal reference.

16.4 Delete

Quote statuses can be deleted only if they are not currently in use.

Deactivation is preferred to preserve consistency in historical records.

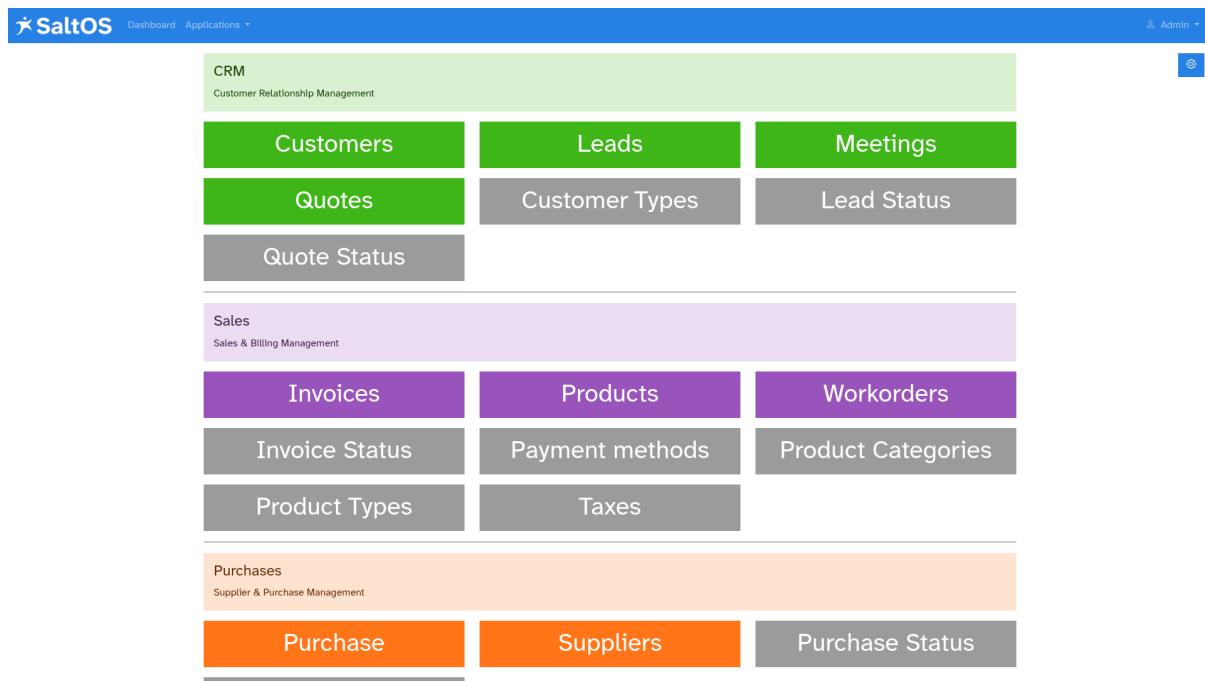
17 Dashboard

17.1 Description

The **dashboard** is the main landing screen in SaltOS4, where users can display quick access buttons, separators, widgets, charts, and other visual elements. It is not a traditional app with forms or records, but rather a dynamic, customizable view designed to provide an overview and fast access to frequent actions.

This screen centralizes commonly used tools and relevant system information.

17.2 Main view



The dashboard can include:

- Quick access **buttons** to apps or actions
- **Titles** grouping sections of content
- **Separators** to visually organize the layout
- **Widgets** displaying live content (e.g., calendar, email, statistics)

17.3 Dashboard configuration

In the **top right corner**, there is a gear icon that opens the **dashboard configuration app**.

From there, users can customize their dashboard:

- Select the active dashboard
- Add or remove **buttons**
- Create **titles** and **visual separators**
- Group elements together in logical blocks
- Include any available **widgets** (e.g., mail, analytics, alerts)

This configuration is user-specific and saved automatically.

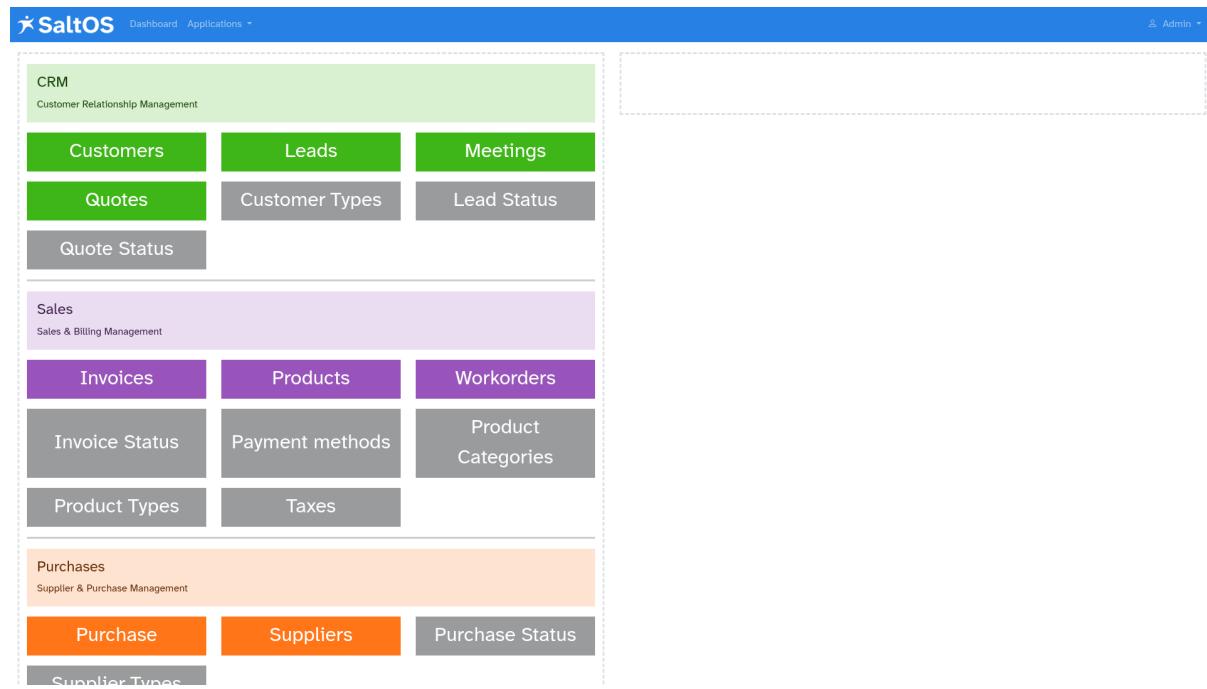
18 Dashboard configuration

18.1 Description

This application allows users to configure the content shown on the **SaltOS4 dashboard**. It is not a traditional app with records, but a visual, user-focused interface for customizing quick access buttons, sections, and widgets that appear on the home dashboard.

Each user can have their own personalized dashboard, and this tool is its visual editor.

18.2 Configuration view



The screen displays a canvas-style layout where dashboard elements can be added, arranged, and grouped visually.

Available elements include:

- **Buttons:** Quick access links to apps or features.
- **Separators:** Visual lines or spaces to structure the layout.
- **Titles:** Headers to organize sections of the dashboard.
- **Widgets:** Dynamic components such as calendar, email, charts, stats, etc.

Elements can be grouped, reordered via drag and drop, and arranged into multiple blocks or columns.

18.3 Features

- Add or remove dashboard elements
- Reorder using drag and drop
- Edit section titles and labels
- Choose which widgets to display

- Organize layout in multiple columns or groups

Changes are saved automatically and apply only to the active user's dashboard.

18.4 Advanced usage

This module is ideal for:

- Creating role-specific dashboards (e.g., sales, tech, admin)
- Displaying only frequently used tools and information
- Improving clarity and efficiency on the SaltOS4 start screen

19 Emails

19.1 Description

The Emails application is used to receive, view, and reply to emails from configured accounts within SaltOS4. It acts as a simplified integrated email client that supports reading messages from POP3 or IMAP, viewing metadata and content, and replying using internal or external SMTP servers.

Each message is presented as a visual card in the list view, showing key fields such as sender, subject, date, and a preview of the body. Emails can be viewed in detail, replied to, or deleted. This app is closely integrated with the Emails Accounts module and is essential for managing inbound communication.

19.2 List view

Recipient	Date	Subject	Preview
alice@example.com	02/01/24	Catching Up	Read Let me know if you're free for a coffee this weekend. I'd love to catch up properly. I saw yo...
manager@business.com	02/01/24	Business Update	New Hey! Just checking in. Been a while since we last talked. Hope you're doing well! He...
bob@example.com	02/01/24	Catching Up	New Hey! Just checking in. Been a while since we last talked. Hope you're doing wel... 1 ↴
jane.doe@business.com	02/01/24	Business Update	New Hey! Just checking in. Been a while since we last talked. Hope you're doing well! 1 s...
bob@example.com	02/01/24	Catching Up	New Let me know your availability to schedule the next planning meeting. Attached is th...
jane.doe@business.com	02/01/24	Business Update	New Let me know if you're free for a coffee this weekend. I'd love to catch up properly. A...
alice@example.com	02/01/24	Catching Up	New Let me know if you're free for a coffee this weekend. I'd love to catch up properly. I ...
manager@business.com	02/01/24	Business Update	New Please find the attached report with all the project updates from this week. Att... 1 ↴
alice@example.com	02/01/24	Catching Up	New Attached is the revised proposal for the client. Please review before our call. Attach...
manager@business.com	02/01/24	Business Update	New Let me know if you're free for a coffee this weekend. I'd love to catch up properly. L...

The list view shows incoming emails as clickable buttons or cards. Each entry typically displays:

- Header: The visual summary used in the interface to represent the email message.
 - Datetime: The date and time the message was received or sent.
 - Subject: The title or subject line of the email message.
 - Snippet: A short preview extracted from the beginning of the email body.
 - Attachments: List of files attached to the message, with download options.

The interface also includes filters and a search form to filter by sender, subject, account, and date.

19.3 View message

This view shows the full content of an email message, including header metadata and attachments.

The following information is typically displayed:

- From: Sender's email address displayed in the message header.
 - To: List of recipients who received the message.
 - CC: Additional recipients who received a visible copy of the email.
 - BCC: Recipients who received a hidden copy of the email.
 - Datetime: Timestamp indicating when the email was sent or received.
 - UIDL: Server-side unique identifier used for synchronization.
 - Priority: Importance level set by the sender (Low, Normal, or High).
 - Sensitivity: Indicates whether the message is Normal, Personal, Private, or Confidential.
 - Sent: Confirms that the email was successfully sent.
 - New: Marks whether the email is unread or newly received.

- Reply: Indicates if the message was replied to.
- Forward: Indicates if the message was forwarded to another recipient.
- Wait: Flag used to track follow-up or pending response.
- SPAM: Marks whether the email is classified as spam.
- Request confirmation of receipt: Shows whether a read receipt was requested for the message.
- Error: Displays an error message if the delivery failed.
- Subject: The subject line of the email.
- Body: The main content or body of the email, displayed in an embedded viewer.
- Adjunts: List of files attached to the email message.

19.4 Reply / Compose

Users can reply to an existing message or compose a new email using a simplified form.

The screenshot shows the SaltOS email application interface. On the left, there is a sidebar with a list of recent emails from various users like alice@example.com, manager@business.com, bob@example.com, jane.doe@business.com, bob@example.com, jane.doe@business.com, alice@example.com, manager@business.com, and alice@example.com. Each email entry includes the date, status (e.g., Read, New), subject, and a preview of the message content. On the right, the main window displays the 'Compose' or 'Reply' form. It has fields for 'From' (set to 'Admin user <admin@example.com>'), 'To', 'CC', 'BCC', 'Request confirmation of receipt' (checkbox), 'Priority' (set to 'Normal'), 'Sensitivity' (set to 'Normal'), 'Subject', 'Message' (an editor with rich text tools), and 'Attachments' (a file upload field). At the bottom right are 'Send' and 'Cancel' buttons.

The reply and compose form includes:

- From: Email account used as the sender for this message.
- To: Primary recipient(s) of the email message.
- CC: Recipients to receive a carbon copy (CC) of the message.
- BCC: Recipients to receive a blind carbon copy (BCC), not visible to others.
- Request confirmation of receipt: Option to request a read receipt confirmation from the recipient.
- Priority: Importance level assigned to the email: Low, Normal, or High.
- Sensitivity: Confidentiality level: Normal, Personal, Private, or Confidential.

- Subject: Subject line of the message, describing its purpose.
- Body: Rich-text content written in the email message.
- Attachments: Files selected to be included along with the message.

19.5 Delete

Emails can be deleted from the list view using the delete icon or action.

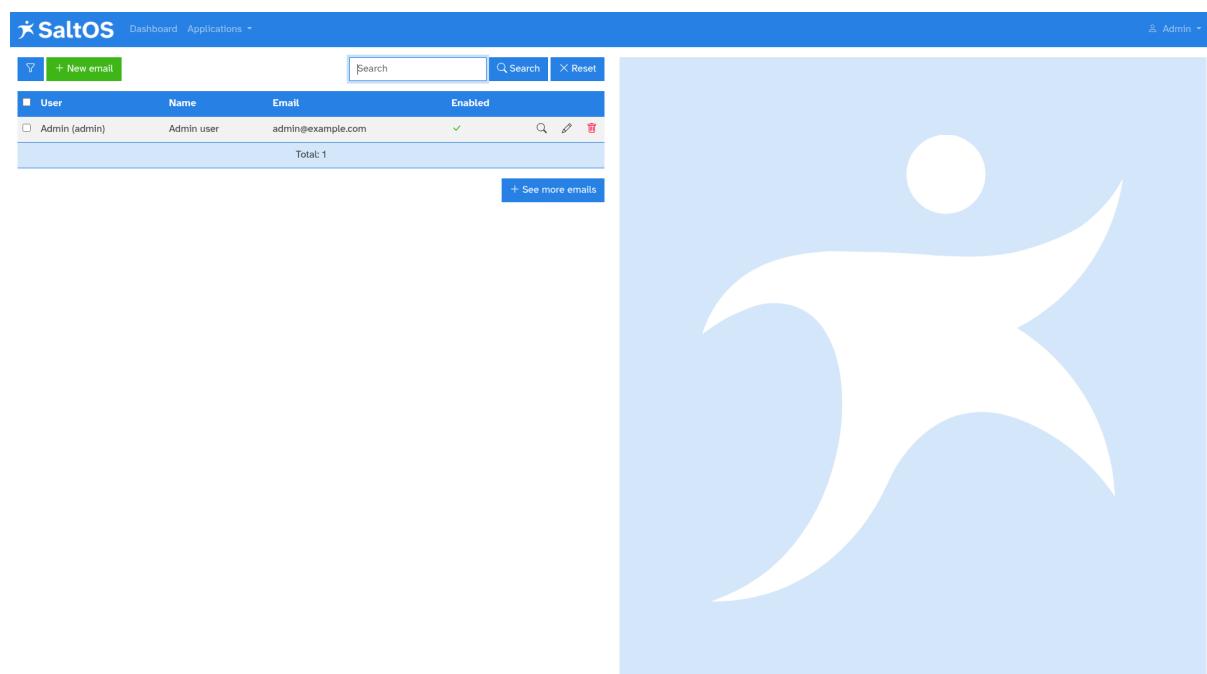
Messages are usually deleted locally or flagged for deletion, depending on the server configuration.

20 Emails Accounts

20.1 Description

The Emails Accounts application is used to configure and manage the email accounts connected to SaltOS4. Each account can be used to send and receive emails via SMTP, IMAP or POP3 protocols. This module allows integration with external email providers and supports authentication, folders, and synchronization options.

20.2 List view



The screenshot shows the 'Emails Accounts' application interface. At the top, there is a navigation bar with the SaltOS logo, 'Dashboard', 'Applications', and an 'Admin' dropdown. Below the navigation bar is a search bar with fields for 'Search', 'Q Search', and 'X Reset'. A large blue button labeled '+ New email' is visible. The main area contains a table with the following data:

User	Name	Email	Enabled
<input checked="" type="checkbox"/> Admin (admin)	Admin user	admin@example.com	

Below the table, it says 'Total: 1'. At the bottom right of the table area is a blue button labeled '+ See more emails'. To the right of the table is a large, light blue graphic of a stylized figure in a dynamic pose.

The following fields are displayed in the list view:

- User: User who owns or uses this email account.
- Name: Descriptive label used to identify the email account within the system.
- Email: The email address configured for this account.
- Enabled: Marks the account as active; synchronization will occur.

20.3 Form view

This view is used to create, view or edit an email account.

In **create** mode, a new account is configured from scratch.

The screenshot shows the SaltOS Email configuration interface. At the top left is a navigation bar with the SaltOS logo, Dashboard, Applications, and Admin dropdown. On the left, a sidebar lists users: Admin (admin) and Admin user. A search bar with 'Search' and 'Reset' buttons is above the main content area. The main area is divided into sections: 'Main configuration', 'Incoming server configuration', and 'Outgoing server configuration'. In 'Main configuration', fields include 'User' (Admin (admin)), 'Name' (Admin user), 'Email' (admin@example.com), and 'Enabled' (checked). Below these are 'Signature' and 'Incoming server configuration' sections. In 'Incoming server configuration', fields include 'Host' (example.com), 'Port' (995), 'Extra' (TLS), 'User' (admin), and 'Password' (*****). Below these are 'Delete' and 'Days' fields. In 'Outgoing server configuration', fields include 'Host' (example.com), 'Port' (587), 'Extra' (TLS), 'User' (admin), and 'Password' (*****).

In **view** mode, account settings are shown without allowing changes.

The screenshot shows the SaltOS Email configuration interface in View mode. The layout is identical to the Create mode screenshot, but the fields are read-only. The 'Main configuration' section shows 'User' (Admin (admin)), 'Name' (Admin user), 'Email' (admin@example.com), and 'Enabled' (checked). The 'Signature' field contains 'Email sent from my SaltOS'. The 'Incoming server configuration' section shows 'Host' (example.com), 'Port' (995), 'Extra' (TLS), 'User' (admin), and 'Password' (*****). The 'Outgoing server configuration' section shows 'Host' (example.com), 'Port' (587), 'Extra' (TLS), 'User' (admin), and 'Password' (*****).

In **edit** mode, the configuration can be updated or corrected.

The screenshot shows the SaltOS application interface with the following sections:

- Main configuration:** Includes fields for User (Admin user), Name (Admin user), Email (admin@example.com), and Enabled (checked). It also contains a Signature editor with the text "Email sent from my SaltOS".
- Incoming server configuration:** Includes fields for Host (example.com), Port (995), Extra (TLS), User (admin), Password (*****), Delete (Yes), and Days (90).
- Outgoing server configuration:** Includes fields for Host (example.com), Port (587), Extra (TLS), User (empty), and Password (empty).

The form includes the following fields:

- User: User who owns or uses this email account.
- Name: Display name or label used to identify the account.
- Email: Actual email address configured for this account.
- Signature: Text or HTML signature added automatically to outgoing messages.
- Host: POP3 server hostname used to receive emails.
- Port: Network port used to connect to the POP3 server (e.g., 110, 995).
- Extra: Additional POP3 connection settings, such as TLS.
- User: Username for POP3 authentication.
- Password: Password for the POP3 account.
- Delete: Whether messages are deleted from the server after download.
- Days: Number of days to keep messages on the server.
- Host: SMTP server hostname used to send emails.
- Port: Network port used for SMTP communication (e.g., 25, 465, 587).
- Extra: SMTP encryption method: none, SSL, or TLS.
- User: Username for SMTP authentication.
- Password: Password for the SMTP server account.
- Disabled: Marks the account as inactive; no synchronization will occur.
- Private: Restricts access to the account to its owner only.
- Default: Sets this account as the default for sending emails.
- Add me to CC: Automatically includes the sender in the CC field.

- Confirm reading to: Sends a read receipt request with each email.

20.4 Delete

Accounts can be deleted if they are not in use or connected to recent email activity.

Disabling is preferred when preserving configuration for future use or audit.

21 Departments

21.1 Description

The Departments application is used to define the organizational structure of the company by grouping employees into departments. It supports hierarchies, allowing a department to belong to a parent department, and helps organize users and permissions accordingly.

Examples of departments include "Sales", "IT", "HR", or "Logistics".

21.2 List view



Name	Code	Parent	Active
Dietitian	DPT-0100	Engineer, building services	X ▾
Designer, ceramics/pottery	DPT-0099	Psychiatric nurse	X ▾
Loss adjuster, chartered	DPT-0098	Editor, film/video	✓ ▾
Fitness centre manager	DPT-0097	Immunologist	X ▾
Multimedia specialist	DPT-0096	Local government officer	✓ ▾
Administrator	DPT-0095	Exhibition designer	✓ ▾
Equality and diversity officer	DPT-0094	Energy engineer	X ▾
Research officer, government	DPT-0093	Production assistant, television	X ▾
Civil Service fast streamer	DPT-0092	Careers adviser	✓ ▾
Museum/gallery curator	DPT-0091	Multimedia programmer	X ▾
Engineer, civil (consulting)	DPT-0090	Dealer	✓ ▾
Network engineer	DPT-0089	Editor, film/video	✓ ▾
Product manager	DPT-0088	Accounting technician	✓ ▾
TEFL teacher	DPT-0087	Photographer	X ▾
Neurosurgeon	DPT-0086	Housing manager/officer	X ▾
Advice worker	DPT-0085	Commercial horticulturist	X ▾
Operational researcher	DPT-0084	Chief Marketing Officer	✓ ▾
Dance movement psychotherapist	DPT-0083	Editor, film/video	X ▾
Multimedia programmer	DPT-0082	Engineer, chemical	✓ ▾
Call centre manager	DPT-0081	Planning and development surveyor	✓ ▾
Producer, television/film/video	DPT-0080	Pilot, airline	X ▾
Air broker	DPT-0079	Hospital pharmacist	X ▾

The following fields are displayed in the list view:

- Name: Name of the department or organizational unit.
- Code: Unique identifier or reference code for the department.
- Parent: Parent department, if this one is part of a hierarchy.
- Active: Indicates whether this department is currently in use.

21.3 Form view

This view is used to create, view or edit departments.

In **create** mode, a new tax rule can be defined.

Name	Code	Parent	Active
Dietitian	DPT-0109	Engineer, building services	<input checked="" type="checkbox"/>
Designer, ceramics/pottery	DPT-0099	Psychiatric nurse	<input checked="" type="checkbox"/>
Loss adjuster, chartered	DPT-0098	Editor, film/video	<input checked="" type="checkbox"/>
Fitness centre manager	DPT-0097	Immunologist	<input checked="" type="checkbox"/>
Multimedia specialist	DPT-0096	Local government officer	<input checked="" type="checkbox"/>
Administrator	DPT-0095	Exhibition designer	<input checked="" type="checkbox"/>
Equality and diversity officer	DPT-0094	Energy engineer	<input checked="" type="checkbox"/>
Research officer, government	DPT-0093	Production assistant, television	<input checked="" type="checkbox"/>
Civil Service fast streamer	DPT-0092	Careers adviser	<input checked="" type="checkbox"/>
Museum/gallery curator	DPT-0091	Multimedia programmer	<input checked="" type="checkbox"/>
Engineer, civil (consulting)	DPT-0090	Dealer	<input checked="" type="checkbox"/>
Network engineer	DPT-0089	Editor, film/video	<input checked="" type="checkbox"/>
Product manager	DPT-0088	Accounting technician	<input checked="" type="checkbox"/>
TEFL teacher	DPT-0087	Photographer	<input checked="" type="checkbox"/>
Neurosurgeon	DPT-0086	Housing manager/officer	<input checked="" type="checkbox"/>
Advice worker	DPT-0085	Commercial horticulturist	<input checked="" type="checkbox"/>
Operational researcher	DPT-0084	Chief Marketing Officer	<input checked="" type="checkbox"/>
Dance movement psychotherapist	DPT-0083	Editor, film/video	<input checked="" type="checkbox"/>
Multimedia programmer	DPT-0082	Engineer, chemical	<input checked="" type="checkbox"/>
Call centre manager	DPT-0081	Planning and development surveyor	<input checked="" type="checkbox"/>
Producer, television/film/video	DPT-0080	Pilot, airline	<input checked="" type="checkbox"/>
Air broker	DPT-0079	Hospital pharmacist	<input checked="" type="checkbox"/>

Active
 Name:
 Code:
 Parent:
 Notes:

 New files:
 No file chosen
 New note:

In **view** mode, tax details are visible but not editable.

Name	Code	Parent	Active
Dietitian	DPT-0109	Engineer, building services	<input checked="" type="checkbox"/>
Designer, ceramics/pottery	DPT-0099	Psychiatric nurse	<input checked="" type="checkbox"/>
Loss adjuster, chartered	DPT-0098	Editor, film/video	<input checked="" type="checkbox"/>
Fitness centre manager	DPT-0097	Immunologist	<input checked="" type="checkbox"/>
Multimedia specialist	DPT-0096	Local government officer	<input checked="" type="checkbox"/>
Administrator	DPT-0095	Exhibition designer	<input checked="" type="checkbox"/>
Equality and diversity officer	DPT-0094	Energy engineer	<input checked="" type="checkbox"/>
Research officer, government	DPT-0093	Production assistant, television	<input checked="" type="checkbox"/>
Civil Service fast streamer	DPT-0092	Careers adviser	<input checked="" type="checkbox"/>
Museum/gallery curator	DPT-0091	Multimedia programmer	<input checked="" type="checkbox"/>
Engineer, civil (consulting)	DPT-0090	Dealer	<input checked="" type="checkbox"/>
Network engineer	DPT-0089	Editor, film/video	<input checked="" type="checkbox"/>
Product manager	DPT-0088	Accounting technician	<input checked="" type="checkbox"/>
TEFL teacher	DPT-0087	Photographer	<input checked="" type="checkbox"/>
Neurosurgeon	DPT-0086	Housing manager/officer	<input checked="" type="checkbox"/>
Advice worker	DPT-0085	Commercial horticulturist	<input checked="" type="checkbox"/>
Operational researcher	DPT-0084	Chief Marketing Officer	<input checked="" type="checkbox"/>
Dance movement psychotherapist	DPT-0083	Editor, film/video	<input checked="" type="checkbox"/>
Multimedia programmer	DPT-0082	Engineer, chemical	<input checked="" type="checkbox"/>
Call centre manager	DPT-0081	Planning and development surveyor	<input checked="" type="checkbox"/>
Producer, television/film/video	DPT-0080	Pilot, airline	<input checked="" type="checkbox"/>
Air broker	DPT-0079	Hospital pharmacist	<input checked="" type="checkbox"/>

Dietitian DPT-0109 Engineer, building services
 Notes:
 Must gun business young too indicate bit.

In **edit** mode, existing values can be updated.

Name	Code	Parent	Active
Dietitian	DPT-0100	Engineer, building services	<input checked="" type="checkbox"/>
Designer, ceramics/pottery	DPT-0099	Psychiatric nurse	<input checked="" type="checkbox"/>
Loss adjuster, chartered	DPT-0098	Editor, film/video	<input checked="" type="checkbox"/>
Fitness centre manager	DPT-0097	Immunologist	<input checked="" type="checkbox"/>
Multimedia specialist	DPT-0096	Local government officer	<input checked="" type="checkbox"/>
Administrator	DPT-0095	Exhibition designer	<input checked="" type="checkbox"/>
Equality and diversity officer	DPT-0094	Energy engineer	<input checked="" type="checkbox"/>
Research officer, government	DPT-0093	Production assistant, television	<input checked="" type="checkbox"/>
Civil Service fast streamer	DPT-0092	Careers adviser	<input checked="" type="checkbox"/>
Museum/gallery curator	DPT-0091	Multimedia programmer	<input checked="" type="checkbox"/>
Engineer, civil (consulting)	DPT-0090	Dealer	<input checked="" type="checkbox"/>
Network engineer	DPT-0089	Editor, film/video	<input checked="" type="checkbox"/>
Product manager	DPT-0088	Accounting technician	<input checked="" type="checkbox"/>
TEFL teacher	DPT-0097	Photographer	<input checked="" type="checkbox"/>
Neurosurgeon	DPT-0086	Housing manager/officer	<input checked="" type="checkbox"/>
Advice worker	DPT-0085	Commercial horticulturist	<input checked="" type="checkbox"/>
Operational researcher	DPT-0084	Chief Marketing Officer	<input checked="" type="checkbox"/>
Dance movement psychotherapist	DPT-0083	Editor, film/video	<input checked="" type="checkbox"/>
Multimedia programmer	DPT-0082	Engineer, chemical	<input checked="" type="checkbox"/>
Call centre manager	DPT-0081	Planning and development surveyor	<input checked="" type="checkbox"/>
Producer, television/film/video	DPT-0080	Pilot, airline	<input checked="" type="checkbox"/>
Air broker	DPT-0079	Hospital pharmacist	<input checked="" type="checkbox"/>

The form includes the following fields:

- Active: Indicates whether this department is currently in use.
- Name: Name of the department or organizational unit.
- Code: Unique identifier or reference code for the department.
- Parent: Parent department, if this one is part of a hierarchy.
- Notes: Additional details about the department's structure, responsibility or purpose.

21.4 Delete

Departments can only be deleted if no employees are currently assigned to them.

If in use, deactivation is recommended instead.

22 Employees

22.1 Description

The Employees application is used to register and manage the personnel working in the organization. It stores personal and professional data including name, contact information, position, department, and system user link. This module is typically used in HR workflows to organize staff and optionally associate them with users of the system.

22.2 List view

Name	Department	Job Title	Active
Morgan Price	Meteorologist	Physicist, medical	X ▾
Robert Harris	Police officer	Minerals surveyor	X ▾
David Morris	Product manager	Engineer, agricultural	X ▾
George Miller	Legal executive	Engineer, electrical	✓ ▾
Nathaniel Williams	Buyer, retail	Water engineer	X ▾
Sean Miller	Police officer	Engineer, maintenance (IT)	✓ ▾
Edward Alexander	Amenity horticulturist	Database administrator	✓ ▾
Vickie Meza	Buyer, retail	Therapist, art	X ▾
Gary Russo	Heritage manager	Drilling engineer	X ▾
Andrea Horton	Police officer	Editor, commissioning	✓ ▾
Tiffany Brennan	Engineer, chemical	Haematologist	X ▾
James Drake DDS	Editor, film/video	Exhibitions officer, museum/gallery	X ▾
Emily Miles	Teacher, early years/pre	Fast food restaurant manager	X ▾
Kimberly Rich	Engineer, chemical	Pharmacologist	✓ ▾
Raymond Rice	Engineer, building services	Contracting civil engineer	✓ ▾
Amy Gilbert	Engineer, building services	Psychotherapist, child	X ▾
Cheryl Martinez	Engineer, building services	Holiday representative	X ▾
Michael Rodriguez	Legal executive	Insurance underwriter	✓ ▾
Desiree Marquez	Manufacturing engineer	Radio producer	✓ ▾
Daniel Jones	Hospital pharmacist	Civil engineer, contracting	X ▾
Elizabeth Miller	Drilling engineer	Intelligence analyst	X ▾
Jennifer Bailey	Product manager	Geochemist	X ▾

The following fields are displayed in the list view:

- Name: Full name of the employee.
- Department: Department the employee belongs to.
- Job Title: Official job title or position held by the employee.
- Active: Indicates whether the employee is currently active.

22.3 Form view

This view is used to create, view or edit employee records.

In **create** mode, a new employee profile is added.

SaltOS Dashboard Applications Admin

Name	Department	Job Title	Active
Morgan Price	Meteorologist	Physicist, medical	<input checked="" type="checkbox"/>
Robert Harris	Police officer	Minerals surveyor	<input checked="" type="checkbox"/>
David Morris	Product manager	Engineer, agricultural	<input checked="" type="checkbox"/>
George Miller	Legal executive	Engineer, electrical	<input checked="" type="checkbox"/>
Nathaniel Williams	Buyer, retail	Water engineer	<input checked="" type="checkbox"/>
Sean Miller	Police officer	Engineer, maintenance (IT)	<input checked="" type="checkbox"/>
Edward Alexander	Amenity horticulturist	Database administrator	<input checked="" type="checkbox"/>
Vickie Meza	Buyer, retail	Therapist, art	<input checked="" type="checkbox"/>
Gary Russo	Heritage manager	Drilling engineer	<input checked="" type="checkbox"/>
Andrea Horton	Police officer	Editor, commissioning	<input checked="" type="checkbox"/>
Tiffany Brennan	Engineer, chemical	Haematologist	<input checked="" type="checkbox"/>
James Drake DDS	Editor, film/video	Exhibitions officer, museum/gallery	<input checked="" type="checkbox"/>
Emily Miles	Teacher, early years/pre	Fast food restaurant manager	<input checked="" type="checkbox"/>
Kimberly Rich	Engineer, chemical	Pharmacologist	<input checked="" type="checkbox"/>
Raymond Rice	Engineer, building services	Contracting civil engineer	<input checked="" type="checkbox"/>
Amy Gilbert	Engineer, building services	Psychotherapist, child	<input checked="" type="checkbox"/>
Cheryl Martinez	Engineer, building services	Holiday representative	<input checked="" type="checkbox"/>
Michael Rodriguez	Legal executive	Insurance underwriter	<input checked="" type="checkbox"/>
Desiree Marquez	Manufacturing engineer	Radio producer	<input checked="" type="checkbox"/>
Daniel Jones	Hospital pharmacist	Civil engineer, contracting	<input checked="" type="checkbox"/>
Elizabeth Miller	Drilling engineer	Intelligence analyst	<input checked="" type="checkbox"/>
Jennifer Bailey	Product manager	Geochemist	<input checked="" type="checkbox"/>

Active
 Name NIF
 Department Job Title Start time End time
 Address City Province / State
 Zip Country
 Email Phone
 Notes
 Type User
 No file chosen
 New note

✓ Create ✗ Cancel

In **view** mode, the profile is shown in read-only format.

SaltOS Dashboard Applications Admin

Name	Department	Job Title	Active
Morgan Price	Meteorologist	Physicist, medical	<input checked="" type="checkbox"/>
Robert Harris	Police officer	Minerals surveyor	<input checked="" type="checkbox"/>
David Morris	Product manager	Engineer, agricultural	<input checked="" type="checkbox"/>
George Miller	Legal executive	Engineer, electrical	<input checked="" type="checkbox"/>
Nathaniel Williams	Buyer, retail	Water engineer	<input checked="" type="checkbox"/>
Sean Miller	Police officer	Engineer, maintenance (IT)	<input checked="" type="checkbox"/>
Edward Alexander	Amenity horticulturist	Database administrator	<input checked="" type="checkbox"/>
Vickie Meza	Buyer, retail	Therapist, art	<input checked="" type="checkbox"/>
Gary Russo	Heritage manager	Drilling engineer	<input checked="" type="checkbox"/>
Andrea Horton	Police officer	Editor, commissioning	<input checked="" type="checkbox"/>
Tiffany Brennan	Engineer, chemical	Haematologist	<input checked="" type="checkbox"/>
James Drake DDS	Editor, film/video	Exhibitions officer, museum/gallery	<input checked="" type="checkbox"/>
Emily Miles	Teacher, early years/pre	Fast food restaurant manager	<input checked="" type="checkbox"/>
Kimberly Rich	Engineer, chemical	Pharmacologist	<input checked="" type="checkbox"/>
Raymond Rice	Engineer, building services	Contracting civil engineer	<input checked="" type="checkbox"/>
Amy Gilbert	Engineer, building services	Psychotherapist, child	<input checked="" type="checkbox"/>
Cheryl Martinez	Engineer, building services	Holiday representative	<input checked="" type="checkbox"/>
Michael Rodriguez	Legal executive	Insurance underwriter	<input checked="" type="checkbox"/>
Desiree Marquez	Manufacturing engineer	Radio producer	<input checked="" type="checkbox"/>
Daniel Jones	Hospital pharmacist	Civil engineer, contracting	<input checked="" type="checkbox"/>
Elizabeth Miller	Drilling engineer	Intelligence analyst	<input checked="" type="checkbox"/>
Jennifer Bailey	Product manager	Geochemist	<input checked="" type="checkbox"/>

Active
 Name NIF
 Department Job Title Start time End time
 Address City Province / State
 Zip Country
 Email Phone
 Notes
 Type User
Info Edit Delete Close

In **edit** mode, the profile can be updated.

The screenshot shows a web-based application interface for managing employees. On the left, there is a grid of employee records with columns for Name, Department, Job Title, and Active status. An 'Active' column contains red 'X' icons. On the right, a detailed view of an employee record is displayed. The employee's name is Morgan Price, with a National Identification Number (NIF) of 87085964Y. The department is Meteorologist, and the job title is Physicist, medical. The start date is 04/30/2022, and the end date is mm/dd/yyyy. The address is 8984 Schultz Motorway Apt. 045, located in Kempfurt, Ohio. The zip code is 98242, and the country is North Macedonia. The email is nicolas57@example.com, and the phone number is 935.678.1850x678. The notes section contains the text: 'News leg style and military decide.' The type is Internal, and the user is Admin (admin). There are fields for New files (Choose Files) and New note. At the bottom right are 'Save' and 'Cancel' buttons.

Name	Department	Job Title	Active
Morgan Price	Meteorologist	Physicist, medical	X
Robert Harris	Police officer	Minerals surveyor	X
David Morris	Product manager	Engineer, agricultural	X
George Miller	Legal executive	Engineer, electrical	✓
Nathaniel Williams	Buyer, retail	Water engineer	X
Sean Miller	Police officer	Engineer, maintenance (IT)	✓
Edward Alexander	Amenity horticulturist	Database administrator	✓
Vickie Meza	Buyer, retail	Therapist, art	X
Gary Russo	Heritage manager	Drilling engineer	X
Andrea Horton	Police officer	Editor, commissioning	✓
Tiffany Brennan	Engineer, chemical	Haematologist	X
James Drake DDS	Editor, film/video	Exhibitions officer, museum/gallery	X
Emily Miles	Teacher, early years/pre	Fast food restaurant manager	X
Kimberly Rich	Engineer, chemical	Pharmacologist	✓
Raymond Rice	Engineer, building services	Contracting civil engineer	✓
Amy Gilbert	Engineer, building services	Psychotherapist, child	X
Cheryl Martinez	Engineer, building services	Holiday representative	X
Michael Rodriguez	Legal executive	Insurance underwriter	✓
Desiree Marquez	Manufacturing engineer	Radio producer	✓
Daniel Jones	Hospital pharmacist	Civil engineer, contracting	X
Elizabeth Miller	Drilling engineer	Intelligence analyst	X
Jennifer Bailey	Product manager	Geochemist	X

The form includes the following fields:

- Active: Indicates whether the employee is currently active.
- Name: Full name of the employee.
- NIF: Employee's national identification number used for legal or fiscal purposes.
- Department: Department the employee belongs to.
- Job Title: Official job title or position held by the employee.
- Start: Start date of employment or contract.
- End: End date of employment or contract (if applicable).
- Address: Postal address of the employee.
- City: City of residence.
- Province / State: Province or administrative region of residence.
- ZIP: Postal code.
- Country: Country of residence.
- Email: Primary contact email of the employee.
- Phone: Main contact phone number.
- Notes: Additional remarks or HR-related observations about the employee.
- Type: Type or category of employee (e.g., full-time, contractor).
- User: System user account linked to the employee.

22.4 Delete

Employees can be deleted if not linked to system users or historical records.

If in use, the profile must be deactivated instead of deleted.

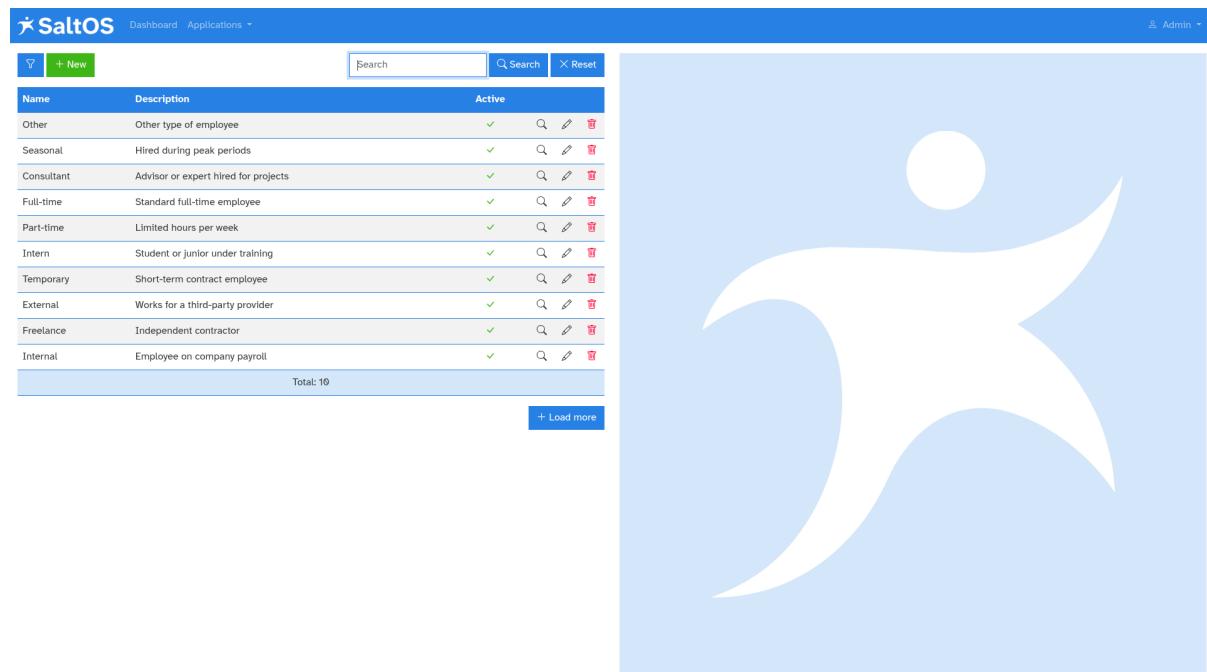
23 Employee Types

23.1 Description

The Employee Types application allows you to classify employees according to their role, contract, or internal categorization. This helps structure the HR database and supports filtering, reporting, or access control.

Common types include "Full-time", "Part-time", "Contractor", "Intern", etc.

23.2 List view



Name	Description	Active
Other	Other type of employee	✓
Seasonal	Hired during peak periods	✓
Consultant	Advisor or expert hired for projects	✓
Full-time	Standard full-time employee	✓
Part-time	Limited hours per week	✓
Intern	Student or junior under training	✓
Temporary	Short-term contract employee	✓
External	Works for a third-party provider	✓
Freelance	Independent contractor	✓
Internal	Employee on company payroll	✓

Total: 10 [+ Load more](#)

The following fields are displayed in the list view:

- Name: Title of the employee type.
- Description: Explanation of the type's purpose.
- Active: Indicates whether the type is currently usable.

23.3 Form view

This view is used to create, view or edit employee type entries.

In **create** mode, a new tax rule can be defined.

The screenshot shows a list of employee types on the left and a detailed view for 'Other' on the right.

List View (Left):

Name	Description	Active
Other	Other type of employee	✓
Seasonal	Hired during peak periods	✓
Consultant	Advisor or expert hired for projects	✓
Full-time	Standard full-time employee	✓
Part-time	Limited hours per week	✓
Intern	Student or junior under training	✓
Temporary	Short-term contract employee	✓
External	Works for a third-party provider	✓
Freelance	Independent contractor	✓
Internal	Employee on company payroll	✓

Total: 10 [+ Load more](#)

Detailed View (Right):

- Active status: Active
- Name: Other
- Description: Other type of employee
- Action buttons: ✓ Create, ✖ Cancel

In **view** mode, tax details are visible but not editable.

The screenshot shows a list of employee types on the left and a detailed view for 'Other' on the right, with the 'Info' button expanded.

List View (Left):

Name	Description	Active
Other	Other type of employee	✓
Seasonal	Hired during peak periods	✓
Consultant	Advisor or expert hired for projects	✓
Full-time	Standard full-time employee	✓
Part-time	Limited hours per week	✓
Intern	Student or junior under training	✓
Temporary	Short-term contract employee	✓
External	Works for a third-party provider	✓
Freelance	Independent contractor	✓
Internal	Employee on company payroll	✓

Total: 10 [+ Load more](#)

Detailed View (Right):

- Active status: Active
- Name: Other
- Description: Other type of employee
- Action buttons: ⚙ Edit, ✖ Delete, ✖ Close

In **edit** mode, existing values can be updated.

The screenshot shows the SaltOS Employee Types application. On the left, there is a list of employee types with columns for Name, Description, and Active status. The 'Active' column contains icons for edit and delete. The 'Description' column contains a link icon. The 'Name' column lists various types like Other, Seasonal, Consultant, etc. A search bar at the top right allows filtering by name or description. On the right, a detailed view of the 'Other' type is shown. It has an 'Active' checkbox (which is checked), a 'Name' field containing 'Other', and a 'Description' field containing 'Other type of employee'. At the bottom right of this view are 'Save' and 'Cancel' buttons.

Name	Description	Active
Other	Other type of employee	
Seasonal	Hired during peak periods	
Consultant	Advisor or expert hired for projects	
Full-time	Standard full-time employee	
Part-time	Limited hours per week	
Intern	Student or junior under training	
Temporary	Short-term contract employee	
External	Works for a third-party provider	
Freelance	Independent contractor	
Internal	Employee on company payroll	

Total: 10

+ Load more

The form includes the following fields:

- Active: Controls if the type is selectable.
- Name: Name shown in the type dropdown in employee forms.
- Description: Notes about the type's intended usage.

23.4 Delete

Employee types can only be deleted if they are not assigned to any employee.

Otherwise, it is recommended to disable them.

24 Purchase

24.1 Description

The Purchase application is used to register and track purchases made from suppliers. Each purchase record includes invoice details, total amount, purchase date, and associated notes or attachments. This module ensures traceability of expenses and is linked to the Suppliers module to maintain consistency.

24.2 List view



SaltOS Dashboard Applications Admin

Order date	Supplier	Invoice	Paid
2025-04-03	Yates-Thompson	PO-0100	✓ ▾
2025-02-10	Lin, Stevens and Wall	PO-0099	✗ ▾
2025-02-02	Davies, Rodgers and Zavala	PO-0098	✓ ▾
2024-12-24	Davenport Inc	PO-0097	✓ ▾
2025-03-20	Olson Group	PO-0096	✗ ▾
2025-02-27	Simmons-Moreno	PO-0095	✗ ▾
2025-01-23	Herrera, Floyd and Williams	PO-0094	✗ ▾
2025-03-25	Rogers-Campbell	PO-0093	✓ ▾
2024-12-16	Johnson-Jones	PO-0092	✓ ▾
2025-03-31	Williams LLC	PO-0091	✓ ▾
2025-01-31	Mccoy, Martin and Nelson	PO-0090	✓ ▾
2024-11-04	Rice LLC	PO-0089	✗ ▾
2025-01-02	Flores and Sons	PO-0088	✓ ▾
2025-01-14	Hood-Browning	PO-0087	✓ ▾
2025-01-19	Davis Ltd	PO-0086	✗ ▾
2025-03-15	Allen LLC	PO-0085	✗ ▾
2025-02-15	White-Williams	PO-0084	✓ ▾
2025-03-19	Marquez LLC	PO-0083	✗ ▾
2024-11-15	Cooper Inc	PO-0082	✓ ▾
2025-02-18	Aguilar PLC	PO-0081	✗ ▾
2024-11-24	Rice LLC	PO-0080	✓ ▾
2024-11-09	Waiker LLC	PO-0079	✗ ▾

The following fields are displayed in the list view:

- Order date: The date when the purchase order was registered in the system.
- Supplier: The vendor or provider from whom goods or services were acquired.
- Invoice: The invoice number or reference issued by the supplier.
- Paid: Indicates whether the purchase has been fully paid.

24.3 Form view

This view is used for creating, editing or viewing a purchase record.

In **create** mode, the form is used to enter a new purchase linked to a supplier.

SaltOS Dashboard Applications Admin

Order date	Supplier	Invoice	Paid
2025-04-03	Yates-Thompson	PO-0100	✓ ▾
2025-02-10	Lin, Stevens and Wall	PO-0099	✗ ▾
2025-02-02	Davies, Rodgers and Zavala	PO-0098	✓ ▾
2024-12-24	Davenport Inc	PO-0097	✓ ▾
2025-03-26	Olson Group	PO-0096	✗ ▾
2025-02-27	Simmons-Moreno	PO-0095	✗ ▾
2025-01-23	Herrera, Floyd and Williams	PO-0094	✗ ▾
2025-03-25	Rogers-Campbell	PO-0093	✓ ▾
2024-12-16	Johnson-Jones	PO-0092	✓ ▾
2025-03-31	Williams LLC	PO-0091	✓ ▾
2025-01-31	Mccoy, Martin and Nelson	PO-0090	✓ ▾
2024-11-04	Rice LLC	PO-0089	✗ ▾
2025-01-02	Flores and Sons	PO-0088	✓ ▾
2025-01-14	Hood-Browning	PO-0087	✓ ▾
2025-01-19	Davis Ltd	PO-0086	✗ ▾
2025-03-15	Allen LLC	PO-0085	✗ ▾
2025-02-15	White-Williams	PO-0084	✓ ▾
2025-03-19	Marquez LLC	PO-0083	✗ ▾
2024-11-15	Cooper Inc	PO-0082	✓ ▾
2025-02-18	Aguilar PLC	PO-0081	✗ ▾
2024-11-24	Rice LLC	PO-0080	✓ ▾
2024-11-09	Walker LLC	PO-0079	✗ ▾

Order date: mm/dd/yyyy Supplier:

 Description:

 Subtotal: Tax: Total: Status:

 Invoice Code: Invoice Date: Paid: Paid date: mm/dd/yyyy

 Notes:

 New files: Choose Files No file chosen

 New note:

In **view** mode, it shows the details of the recorded purchase, in read-only mode.

SaltOS Dashboard Applications Admin

Order date	Supplier	Invoice	Paid
2025-04-03	Yates-Thompson	PO-0100	✓ ▾
2025-02-10	Lin, Stevens and Wall	PO-0099	✗ ▾
2025-02-02	Davies, Rodgers and Zavala	PO-0098	✓ ▾
2024-12-24	Davenport Inc	PO-0097	✓ ▾
2025-03-26	Olson Group	PO-0096	✗ ▾
2025-02-27	Simmons-Moreno	PO-0095	✗ ▾
2025-01-23	Herrera, Floyd and Williams	PO-0094	✗ ▾
2025-03-25	Rogers-Campbell	PO-0093	✓ ▾
2024-12-16	Johnson-Jones	PO-0092	✓ ▾
2025-03-31	Williams LLC	PO-0091	✓ ▾
2025-01-31	Mccoy, Martin and Nelson	PO-0090	✓ ▾
2024-11-04	Rice LLC	PO-0089	✗ ▾
2025-01-02	Flores and Sons	PO-0088	✓ ▾
2025-01-14	Hood-Browning	PO-0087	✓ ▾
2025-01-19	Davis Ltd	PO-0086	✗ ▾
2025-03-15	Allen LLC	PO-0085	✗ ▾
2025-02-15	White-Williams	PO-0084	✓ ▾
2025-03-19	Marquez LLC	PO-0083	✗ ▾
2024-11-15	Cooper Inc	PO-0082	✓ ▾
2025-02-18	Aguilar PLC	PO-0081	✗ ▾
2024-11-24	Rice LLC	PO-0080	✓ ▾
2024-11-09	Walker LLC	PO-0079	✗ ▾

Order date: 04/03/2025 Supplier: Yates-Thompson

 Description: Husband size fly.

 Subtotal: 1031.73 Tax: 216.66 Total: 1248.39 Status: Ordered

 Invoice Code: PO-0100 Invoice Date: 04/07/2025 Paid: 469.06 Paid date: 05/15/2025

 Notes: Particular impact study feel side debate.

In **edit** mode, the information can be updated if necessary.

The screenshot shows a two-panel interface. The left panel displays a grid of purchase orders with columns for Order date, Supplier, Invoice, and Paid status. The right panel shows a detailed view of a specific purchase order for 'Yates-Thompson' on '04/03/2025'. It includes fields for Description ('Husband size fly.'), Subtotal (1031.73), Tax (216.66), Total (1248.39), Status (Ordered), Invoice Code (PO-0109), Invoice Date (04/07/2025), Paid (469.06), Paid date (05/15/2025), Notes ('Particular impact study feel side debate.'), New files ('Choose Files'), and a footer with Save and Cancel buttons.

Order date	Supplier	Invoice	Paid
2025-04-03	Yates-Thompson	PO-0109	✓
2025-02-19	Lin, Stevens and Wall	PO-0099	✗
2025-02-02	Davies, Rodgers and Zavala	PO-0098	✓
2024-12-24	Davenport Inc	PO-0097	✓
2025-03-26	Olson Group	PO-0096	✗
2025-02-27	Simmons-Moreno	PO-0095	✗
2025-01-23	Herrera, Floyd and Williams	PO-0094	✗
2025-03-25	Rogers-Campbell	PO-0093	✓
2024-12-16	Johnson-Jones	PO-0092	✓
2025-03-31	Williams LLC	PO-0091	✓
2025-01-31	Mccoy, Martin and Nelson	PO-0090	✓
2024-11-04	Rice LLC	PO-0089	✗
2025-01-02	Flores and Sons	PO-0088	✓
2025-01-14	Hood-Brownling	PO-0087	✓
2025-01-19	Davis Ltd	PO-0086	✗
2025-03-15	Allen LLC	PO-0085	✗
2025-02-15	White-Williams	PO-0084	✓
2025-03-19	Marquez LLC	PO-0083	✗
2024-11-15	Cooper Inc	PO-0082	✓
2025-02-18	Aguilar PLC	PO-0081	✗
2024-11-24	Rice LLC	PO-0080	✓
2024-11-09	Walker LLC	PO-0079	✗

The form includes the following fields:

- Order date: The date when the purchase order was registered in the system.
- Supplier: The vendor or provider from whom goods or services were acquired.
- Description: A short explanation or summary of the purchase content.
- Subtotal: The total amount before taxes and discounts.
- Tax: The total value of taxes applied to the purchase.
- Total: The final total of the purchase, including taxes and discounts.
- Status: The current status of the purchase (e.g., draft, ordered, received).
- Invoice Code: The invoice number or reference issued by the supplier.
- Invoice Date: The official date of the supplier's invoice.
- Paid: Indicates whether the purchase has been fully paid.
- Paid Date: The date when the payment was made to the supplier.
- Notes: Internal observations or relevant administrative information.

24.4 Delete

Purchase records can be deleted only if they are not linked to accounting records or processes. A confirmation dialog will appear before proceeding.

Once registered and finalized, deletion is restricted based on system permissions and traceability.

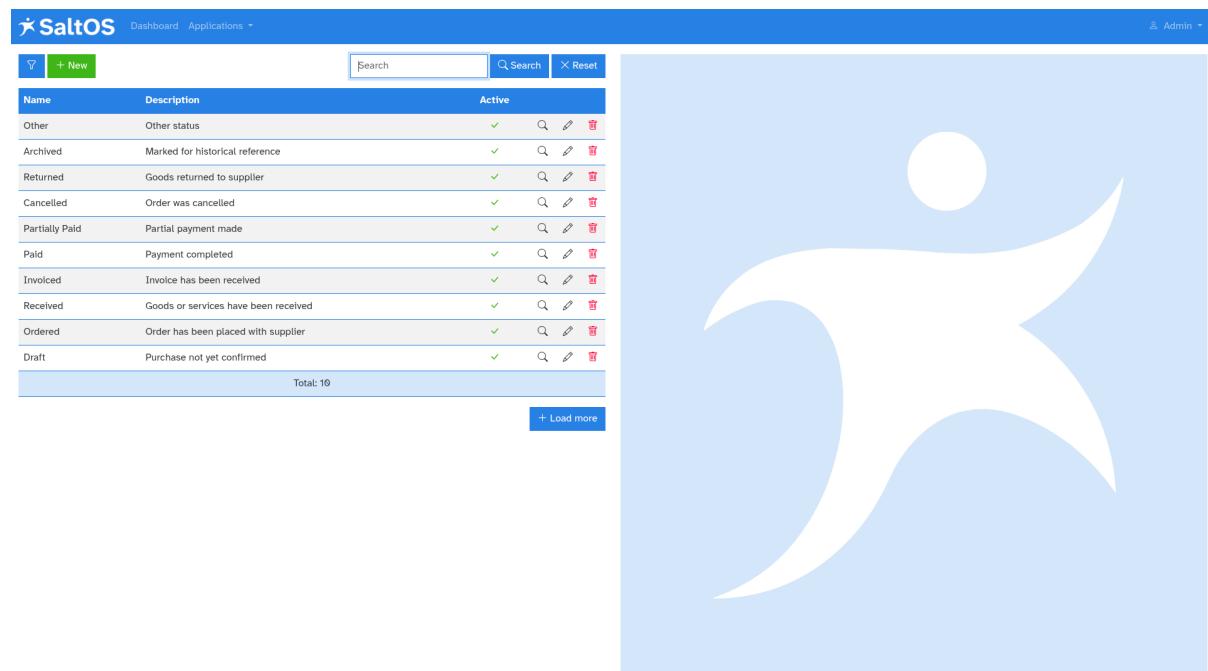
25 Purchase Status

25.1 Description

The Purchase Status application defines the stages a purchase record can go through. It allows categorizing purchases according to their state, such as "Draft", "Ordered", "Received", or "Cancelled".

These statuses help in tracking the progress of procurement processes and improve clarity in the Purchase module.

25.2 List view



Name	Description	Active
Other	Other status	✓
Archived	Marked for historical reference	✓
Returned	Goods returned to supplier	✓
Cancelled	Order was cancelled	✓
Partially Paid	Partial payment made	✓
Paid	Payment completed	✓
Invoiced	Invoice has been received	✓
Received	Goods or services have been received	✓
Ordered	Order has been placed with supplier	✓
Draft	Purchase not yet confirmed	✓

Total: 10 [+ Load more](#)

The following fields are displayed in the list view:

- Name: Name of the status (e.g., Received, Cancelled).
- Description: Clarifies how or when this status is used.
- Active: Indicates if the status is currently selectable.

25.3 Form view

This view is used to create, view or edit purchase status entries.

In **create** mode, the form is used to enter a new purchase linked to a supplier.

The screenshot shows a list of purchase statuses on the left and a detailed view of the 'Other' status on the right.

List View (Left):

Name	Description	Active
Other	Other status	✓
Archived	Marked for historical reference	✓
Returned	Goods returned to supplier	✓
Cancelled	Order was cancelled	✓
Partially Paid	Partial payment made	✓
Paid	Payment completed	✓
Invoiced	Invoice has been received	✓
Received	Goods or services have been received	✓
Ordered	Order has been placed with supplier	✓
Draft	Purchase not yet confirmed	✓

Total: 10 [+ Load more](#)

Detail View (Right):

Active
Name: Other
Description: Other status
[✓ Create](#) [✗ Cancel](#)

In **view** mode, it shows the details of the recorded purchase, in read-only mode.

The screenshot shows a list of purchase statuses on the left and a detailed view of the 'Other' status on the right, with edit buttons visible.

List View (Left):

Name	Description	Active
Other	Other status	✓
Archived	Marked for historical reference	✓
Returned	Goods returned to supplier	✓
Cancelled	Order was cancelled	✓
Partially Paid	Partial payment made	✓
Paid	Payment completed	✓
Invoiced	Invoice has been received	✓
Received	Goods or services have been received	✓
Ordered	Order has been placed with supplier	✓
Draft	Purchase not yet confirmed	✓

Total: 10 [+ Load more](#)

Detail View (Right):

Active
Name: Other
Description: Other status
[Info](#) [✗ Edit](#) [✗ Delete](#) [✗ Close](#)

In **edit** mode, the information can be updated if necessary.

The screenshot shows the SaltOS application interface. On the left, there is a list of purchase statuses with columns for Name, Description, and Active. The 'Active' column contains a green checkmark icon. The 'Name' column lists various statuses like Other, Archived, Returned, Cancelled, etc. The 'Description' column provides a brief explanation for each status. A search bar at the top right allows filtering by name or description. On the right, a detailed view of the 'Other' status is shown. It includes fields for Name (set to 'Other'), Description (set to 'Other status'), and an Active checkbox which is checked. At the bottom right of this view are 'Save' and 'Cancel' buttons.

Name	Description	Active
Other	Other status	✓
Archived	Marked for historical reference	✓
Returned	Goods returned to supplier	✓
Cancelled	Order was cancelled	✓
Partially Paid	Partial payment made	✓
Paid	Payment completed	✓
Invoiced	Invoice has been received	✓
Received	Goods or services have been received	✓
Ordered	Order has been placed with supplier	✓
Draft	Purchase not yet confirmed	✓

Total: 10

+ Load more

Active
Name
Description
✓ Save X Cancel

The form includes the following fields:

- Active: Controls availability in the status dropdown.
- Name: Status label as it appears in the purchase form.
- Description: Internal notes about its use case.

25.4 Delete

Statuses can only be deleted if no purchases are currently using them.

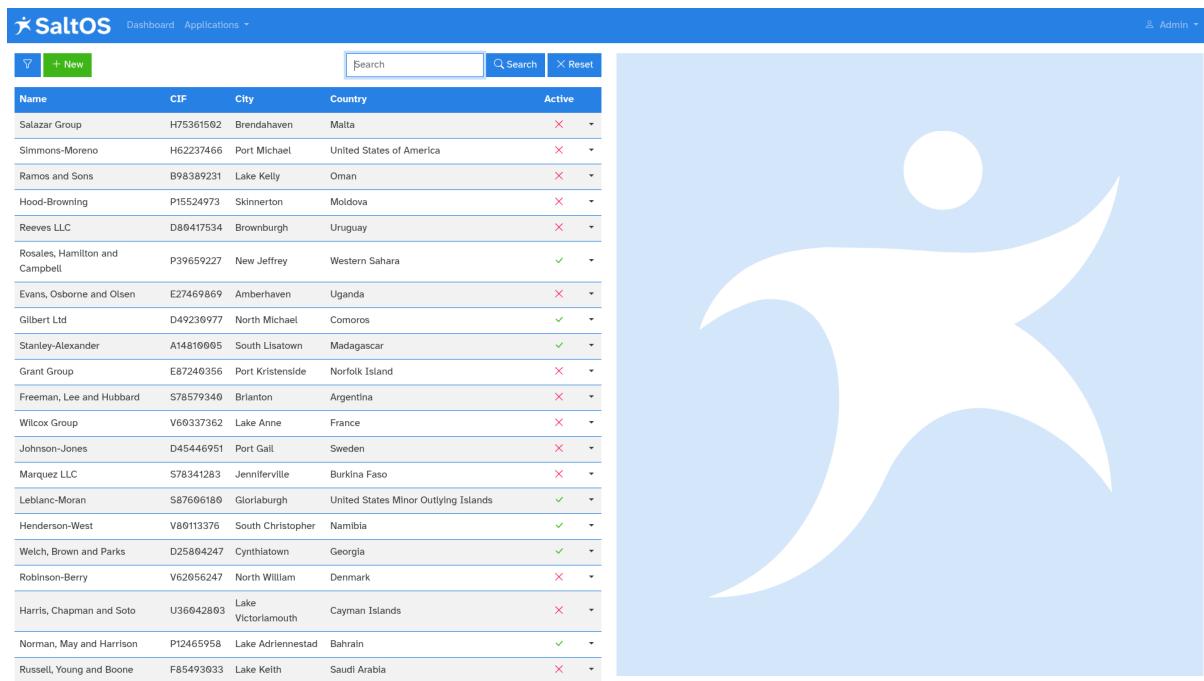
In most cases, deactivation is preferred.

26 Suppliers

26.1 Description

The Suppliers application is used to manage the list of vendors or external providers the organization works with. It stores essential information such as identification, contact details, tax code, and classification. This module is linked to purchase workflows, allowing you to associate suppliers with purchases and maintain full traceability.

26.2 List view



Name	CIF	City	Country	Active
Salazar Group	H75361502	Brendahaven	Malta	X ▾
Simmons-Moreno	H62237466	Port Michael	United States of America	X ▾
Ramos and Sons	B98389231	Lake Kelly	Oman	X ▾
Hood-Browning	P15524973	Skinnerton	Moldova	X ▾
Reeves LLC	D80417534	Brownburgh	Uruguay	X ▾
Rosales, Hamilton and Campbell	P39659227	New Jeffrey	Western Sahara	✓ ▾
Evans, Osborne and Olsen	E27469869	Amberhaven	Uganda	X ▾
Gilbert Ltd	D49230977	North Michael	Comoros	✓ ▾
Stanley-Alexander	A14810695	South Listatown	Madagascar	✓ ▾
Grant Group	E87249356	Port Kristenside	Norfolk Island	X ▾
Freeman, Lee and Hubbard	S78579349	Brianton	Argentina	X ▾
Wilcox Group	V69337362	Lake Anne	France	X ▾
Johnson-Jones	D45446951	Port Gail	Sweden	X ▾
Marquez LLC	S78341283	Jenniferville	Burkina Faso	X ▾
Leblanc-Moran	S87666180	Gloriaburgh	United States Minor Outlying Islands	✓ ▾
Henderson-West	V80113376	South Christopher	Namibia	✓ ▾
Welch, Brown and Parks	D25864247	Cynthiatown	Georgia	✓ ▾
Robinson-Berry	V62056247	North Willam	Denmark	X ▾
Harris, Chapman and Soto	U366042863	Lake Victorlemouth	Cayman Islands	X ▾
Norman, May and Harrison	P12465958	Lake Adriennestad	Bahrain	✓ ▾
Russell, Young and Boone	F85493033	Lake Keith	Saudi Arabia	X ▾

The following fields are displayed in the list view:

- Name: Name or legal entity of the supplier.
- CIF: Tax identification code of the supplier (e.g., VAT, NIF, CIF).
- City: City associated with the supplier's address.
- Country: Country where the supplier is located or registered.
- Active: Indicates whether the supplier is currently active in the system.

26.3 Form view

This view is used for creating, editing or viewing supplier records.

In **create** mode, the form is blank to add a new supplier.

SaltOS Dashboard Applications Admin

Name	CIF	City	Country	Active
Salazar Group	H75361502	Brendahaven	Malta	<input checked="" type="checkbox"/>
Simmons-Moreno	H62237466	Port Michael	United States of America	<input checked="" type="checkbox"/>
Ramos and Sons	B98389231	Lake Kelly	Oman	<input checked="" type="checkbox"/>
Hood-Browning	P15524973	Skinnerton	Moldova	<input checked="" type="checkbox"/>
Reeves LLC	D86417534	Brownburgh	Uruguay	<input checked="" type="checkbox"/>
Rosales, Hamilton and Campbell	P39659227	New Jeffrey	Western Sahara	<input checked="" type="checkbox"/>
Evans, Osborne and Olsen	E27469869	Amberhaven	Uganda	<input checked="" type="checkbox"/>
Gilbert Ltd	D49230977	North Michael	Comoros	<input checked="" type="checkbox"/>
Stanley-Alexander	A14810695	South Lisatown	Madagascar	<input checked="" type="checkbox"/>
Grant Group	E87246356	Port Kristenside	Norfolk Island	<input checked="" type="checkbox"/>
Freeman, Lee and Hubbard	S78579340	Brianton	Argentina	<input checked="" type="checkbox"/>
Wilcox Group	V660337362	Lake Anne	France	<input checked="" type="checkbox"/>
Johnson-Jones	D45446951	Port Gail	Sweden	<input checked="" type="checkbox"/>
Marquez LLC	S78341283	Jenniferville	Burkina Faso	<input checked="" type="checkbox"/>
Leblanc-Moran	S87606180	Gloriaburgh	United States Minor Outlying Islands	<input checked="" type="checkbox"/>
Henderson-West	V80113376	South Christopher	Namibia	<input checked="" type="checkbox"/>
Welch, Brown and Parks	D25864247	Cynthiatown	Georgia	<input checked="" type="checkbox"/>
Robinson-Berry	V62056247	North Willam	Denmark	<input checked="" type="checkbox"/>
Harris, Chapman and Soto	U36642863	Lake Victorlamouth	Cayman Islands	<input checked="" type="checkbox"/>
Norman, May and Harrison	P12465958	Lake Adriennestad	Bahrain	<input checked="" type="checkbox"/>
Russell, Young and Boone	F85493033	Lake Keith	Saudi Arabia	<input checked="" type="checkbox"/>

Active

Name: CIF:

Address: City: Province / State:

Zip: Country:

Email: Phone: Website:

Notes:

Type:

In **view** mode, the fields are shown in read-only mode.

SaltOS Dashboard Applications Admin

Name	CIF	City	Country	Active
Salazar Group	H75361502	Brendahaven	Malta	<input checked="" type="checkbox"/>
Simmons-Moreno	H62237466	Port Michael	United States of America	<input checked="" type="checkbox"/>
Ramos and Sons	B98389231	Lake Kelly	Oman	<input checked="" type="checkbox"/>
Hood-Browning	P15524973	Skinnerton	Moldova	<input checked="" type="checkbox"/>
Reeves LLC	D86417534	Brownburgh	Uruguay	<input checked="" type="checkbox"/>
Rosales, Hamilton and Campbell	P39659227	New Jeffrey	Western Sahara	<input checked="" type="checkbox"/>
Evans, Osborne and Olsen	E27469869	Amberhaven	Uganda	<input checked="" type="checkbox"/>
Gilbert Ltd	D49230977	North Michael	Comoros	<input checked="" type="checkbox"/>
Stanley-Alexander	A14810695	South Lisatown	Madagascar	<input checked="" type="checkbox"/>
Grant Group	E87246356	Port Kristenside	Norfolk Island	<input checked="" type="checkbox"/>
Freeman, Lee and Hubbard	S78579340	Brianton	Argentina	<input checked="" type="checkbox"/>
Wilcox Group	V660337362	Lake Anne	France	<input checked="" type="checkbox"/>
Johnson-Jones	D45446951	Port Gail	Sweden	<input checked="" type="checkbox"/>
Marquez LLC	S78341283	Jenniferville	Burkina Faso	<input checked="" type="checkbox"/>
Leblanc-Moran	S87606180	Gloriaburgh	United States Minor Outlying Islands	<input checked="" type="checkbox"/>
Henderson-West	V80113376	South Christopher	Namibia	<input checked="" type="checkbox"/>
Welch, Brown and Parks	D25864247	Cynthiatown	Georgia	<input checked="" type="checkbox"/>
Robinson-Berry	V62056247	North Willam	Denmark	<input checked="" type="checkbox"/>
Harris, Chapman and Soto	U36642863	Lake Victorlamouth	Cayman Islands	<input checked="" type="checkbox"/>
Norman, May and Harrison	P12465958	Lake Adriennestad	Bahrain	<input checked="" type="checkbox"/>
Russell, Young and Boone	F85493033	Lake Keith	Saudi Arabia	<input checked="" type="checkbox"/>

Active

Name: CIF:

Address: City: Province / State:

Zip: Country:

Email: Phone: Website:

Notes:

Type:

In **edit** mode, supplier data can be updated.

The screenshot shows a two-panel interface. The left panel displays a grid of supplier records with columns for Name, CIF, City, Country, and Active status. The right panel shows a detailed form for a selected supplier, with fields for Name, CIF, Address, City, Province / State, Zip, Country, Email, Phone, Website, Notes, and Type. A file upload section for new files is also present. At the bottom right are Save and Cancel buttons.

Name	CIF	City	Country	Active
Salazar Group	H75361502	Brendahaven	Malta	<input checked="" type="checkbox"/>
Simmons-Moreno	H62237466	Port Michael	United States of America	<input checked="" type="checkbox"/>
Ramos and Sons	B98389231	Lake Kelly	Oman	<input checked="" type="checkbox"/>
Hood-Browning	P15524973	Skinnerton	Moldova	<input checked="" type="checkbox"/>
Reeves LLC	D86417534	Brownburgh	Uruguay	<input checked="" type="checkbox"/>
Rosales, Hamilton and Campbell	P39659227	New Jeffrey	Western Sahara	<input checked="" type="checkbox"/>
Evans, Osborne and Olsen	E27469869	Amberhaven	Uganda	<input checked="" type="checkbox"/>
Gilbert Ltd	D49230977	North Michael	Comoros	<input checked="" type="checkbox"/>
Stanley-Alexander	A14810695	South Lisatown	Madagascar	<input checked="" type="checkbox"/>
Grant Group	E87249356	Port Kristenside	Norfolk Island	<input checked="" type="checkbox"/>
Freeman, Lee and Hubbard	S78579340	Brianton	Argentina	<input checked="" type="checkbox"/>
Wilcox Group	V660337362	Lake Anne	France	<input checked="" type="checkbox"/>
Johnson-Jones	D45446951	Port Gail	Sweden	<input checked="" type="checkbox"/>
Marquez LLC	S78341283	Jenniferville	Burkina Faso	<input checked="" type="checkbox"/>
Leblanc-Moran	S87606180	Gloriaburgh	United States Minor Outlying Islands	<input checked="" type="checkbox"/>
Henderson-West	V80113376	South Christopher	Namibia	<input checked="" type="checkbox"/>
Welch, Brown and Parks	D25864247	Cynthiatown	Georgia	<input checked="" type="checkbox"/>
Robinson-Berry	V62056247	North Willam	Denmark	<input checked="" type="checkbox"/>
Harris, Chapman and Soto	U36042863	Lake Victorlamouth	Cayman Islands	<input checked="" type="checkbox"/>
Norman, May and Harrison	P12465958	Lake Adriennestad	Bahrain	<input checked="" type="checkbox"/>
Russell, Young and Boone	F85493033	Lake Keith	Saudi Arabia	<input checked="" type="checkbox"/>

The form includes the following fields:

- Active: Indicates whether the supplier is currently active in the system.
- Name: Name or legal entity of the supplier.
- CIF: Tax identification code of the supplier (e.g., VAT, NIF, CIF).
- Address: Street or billing address of the supplier.
- City: City associated with the supplier's address.
- Province / State: Province or region linked to the supplier's address.
- ZIP: Postal code of the supplier's address.
- Country: Country where the supplier is located or registered.
- Email: Primary contact email address for the supplier.
- Phone: Main contact number for the supplier.
- Website: Website or external link associated with the supplier.
- Notes: Additional internal information or remarks about the supplier.
- Type: Category or classification of the supplier.

26.4 Delete

Supplier records can be deleted if not referenced in purchases or documents. A confirmation dialog appears before deletion.

Once linked to purchases or financial records, the supplier becomes protected from removal.

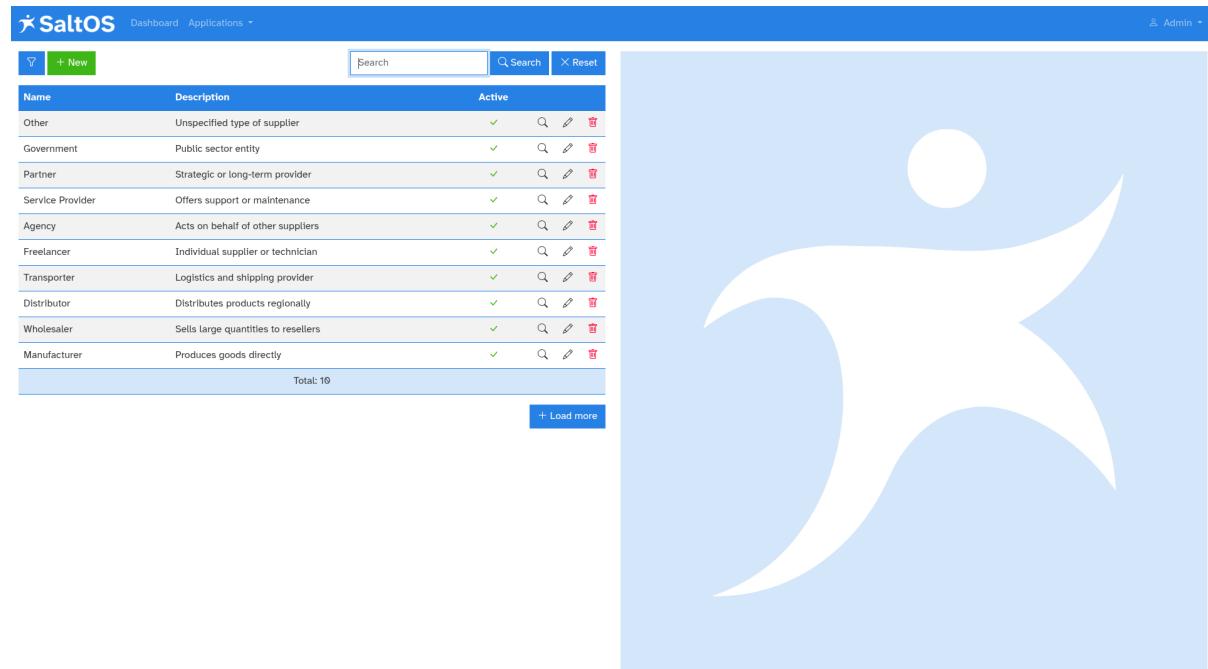
27 Supplier Types

27.1 Description

The Supplier Types application is used to classify suppliers by category, industry, or relationship. This classification helps filter and organize suppliers, and may be used for segmentation or reporting purposes.

Examples of types include "Distributor", "Manufacturer", "Service Provider", etc.

27.2 List view



Name	Description	Active
Other	Unspecified type of supplier	✓
Government	Public sector entity	✓
Partner	Strategic or long-term provider	✓
Service Provider	Offers support or maintenance	✓
Agency	Acts on behalf of other suppliers	✓
Freelancer	Individual supplier or technician	✓
Transporter	Logistics and shipping provider	✓
Distributor	Distributes products regionally	✓
Wholesaler	Sells large quantities to resellers	✓
Manufacturer	Produces goods directly	✓

Total: 10 [+ Load more](#)

The following fields are displayed in the list view:

- Name: Name of the supplier type.
- Description: Optional clarification or internal note.
- Active: Indicates whether the type can be assigned to suppliers.

27.3 Form view

This view is used to create, view or edit supplier type entries.

In **create** mode, a new tax rule can be defined.

The screenshot shows a list of supplier types on the left and a detailed view of the 'Other' type on the right.

List View (Left):

Name	Description	Active
Other	Unspecified type of supplier	✓
Government	Public sector entity	✓
Partner	Strategic or long-term provider	✓
Service Provider	Offers support or maintenance	✓
Agency	Acts on behalf of other suppliers	✓
Freelancer	Individual supplier or technician	✓
Transporter	Logistics and shipping provider	✓
Distributor	Distributes products regionally	✓
Wholesaler	Sells large quantities to resellers	✓
Manufacturer	Produces goods directly	✓

Total: 10 [+ Load more](#)

Detail View (Right):

- Active status:
- Name: Other
- Description: Unspecified type of supplier
- Action buttons:

In **view** mode, tax details are visible but not editable.

The screenshot shows a list of supplier types on the left and a detailed view of the 'Other' type on the right, with the 'Info' button expanded.

List View (Left):

Name	Description	Active
Other	Unspecified type of supplier	✓
Government	Public sector entity	✓
Partner	Strategic or long-term provider	✓
Service Provider	Offers support or maintenance	✓
Agency	Acts on behalf of other suppliers	✓
Freelancer	Individual supplier or technician	✓
Transporter	Logistics and shipping provider	✓
Distributor	Distributes products regionally	✓
Wholesaler	Sells large quantities to resellers	✓
Manufacturer	Produces goods directly	✓

Total: 10 [+ Load more](#)

Detail View (Right):

- Active status:
- Name: Other
- Description: Unspecified type of supplier
- Action buttons:
- Info button: Info

In **edit** mode, existing values can be updated.

Name	Description	Active
Other	Unspecified type of supplier	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Government	Public sector entity	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Partner	Strategic or long-term provider	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Service Provider	Offers support or maintenance	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Agency	Acts on behalf of other suppliers	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Freelancer	Individual supplier or technician	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Transporter	Logistics and shipping provider	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Distributor	Distributes products regionally	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Wholesaler	Sells large quantities to resellers	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Manufacturer	Produces goods directly	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Total: 10 [+ Load more](#)

Active

Name: Other

Description: Unspecified type of supplier

[✓ Save](#) [✗ Cancel](#)

The form includes the following fields:

- Active: Enables or disables the type for selection.
- Name: Descriptive label for the type.
- Description: Additional information or context.

27.4 Delete

Supplier types can only be deleted if not currently assigned to any supplier.

If in use, they should be disabled instead of removed.

28 Invoices

28.1 Description

The Invoices application is used to issue and manage customer billing records. Each invoice contains product or service lines, quantities, unit prices, taxes, and discounts. This module supports both pro forma and finalized invoices, tracks payment status, and integrates with the Customers, Products, and Taxes modules. It also provides traceability for due dates, payment dates, and links to related documents.

28.2 List view

Customer	CIF	Invoice	Date	Total	Closed	Paid
SaltOS Solutions SL	B12345678	P2025-0100	2025-03-28	16687.6	X	X
SaltOS Solutions SL	B12345678	F2025-0099	2025-04-04	12880.5	✓	✓
SaltOS Solutions SL	B12345678	P2025-0098	2025-04-16	5483.32	X	X
SaltOS Solutions SL	B12345678	F2025-0097	2025-04-15	9399.21	✓	X
SaltOS Solutions SL	B12345678	F2025-0096	2025-03-27	1662.88	✓	X
SaltOS Solutions SL	B12345678	F2025-0095	2025-04-14	3492.23	✓	X
SaltOS Solutions SL	B12345678	F2025-0094	2025-03-28	6859.89	✓	X
SaltOS Solutions SL	B12345678	P2025-0093	2025-04-08	615.18	X	X
SaltOS Solutions SL	B12345678	F2025-0092	2025-04-13	2656.47	✓	X
SaltOS Solutions SL	B12345678	P2025-0091	2025-03-25	4261.76	X	X
SaltOS Solutions SL	B12345678	P2025-0090	2025-04-14	5696.69	X	X
SaltOS Solutions SL	B12345678	F2025-0089	2025-04-13	1763.59	✓	✓
SaltOS Solutions SL	B12345678	F2025-0088	2025-04-11	12090.3	✓	X
SaltOS Solutions SL	B12345678	F2025-0087	2025-03-23	7564.76	✓	✓
SaltOS Solutions SL	B12345678	P2025-0086	2025-02-28	20366.2	X	X
SaltOS Solutions SL	B12345678	P2025-0085	2025-03-23	13391.1	X	X
SaltOS Solutions SL	B12345678	F2025-0084	2025-03-19	5749.18	✓	✓
SaltOS Solutions SL	B12345678	F2025-0083	2025-03-20	17851.4	✓	X
SaltOS Solutions SL	B12345678	P2025-0082	2025-02-25	10986.4	X	X
SaltOS Solutions SL	B12345678	F2025-0081	2025-03-13	38.1	✓	X
SaltOS Solutions SL	B12345678	F2025-0080	2025-04-03	21984.8	✓	✓
SaltOS Solutions SL	B12345678	P2025-0079	2025-03-27	15250	X	X

The following fields are displayed in the list view:

- **Customer:** The client who receives the invoice and is responsible for payment.
- **CIF:** The fiscal identification code of the customer at the time of invoicing.
- **Invoice:** The internal reference or invoice number assigned to the document.
- **Date:** The official issue date of the invoice.
- **Total:** The total amount due, including taxes and discounts.
- **Closed:** Indicates whether the invoice has been finalized and is no longer editable.
- **Paid:** Indicates whether the invoice has been marked as paid.

28.3 Form view

This view is used for creating, editing or viewing an invoice.

In **create** mode, the form is empty and allows the user to generate a new invoice, including pro forma invoices.

SaltOS Dashboard Applications Admin

Customer	CIF	Invoice	Date	Total	Closed	Paid
□ SaltOS Solutions SL	B12345678	P2025-0100	2025-03-28	16687.6	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0099	2025-04-04	12880.5	✓	✓
□ SaltOS Solutions SL	B12345678	P2025-0098	2025-04-16	5483.32	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0097	2025-04-15	9399.21	✓	✗
□ SaltOS Solutions SL	B12345678	F2025-0096	2025-03-27	1662.88	✓	✗
□ SaltOS Solutions SL	B12345678	F2025-0095	2025-04-14	3492.23	✓	✗
□ SaltOS Solutions SL	B12345678	F2025-0094	2025-03-28	6859.89	✓	✗
□ SaltOS Solutions SL	B12345678	P2025-0093	2025-04-08	615.18	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0092	2025-04-13	2056.47	✓	✗
□ SaltOS Solutions SL	B12345678	P2025-0091	2025-03-25	4261.76	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0090	2025-04-14	5696.69	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0089	2025-04-13	1763.59	✓	✓
□ SaltOS Solutions SL	B12345678	F2025-0088	2025-04-11	12090.3	✓	✗
□ SaltOS Solutions SL	B12345678	F2025-0087	2025-03-23	7504.76	✓	✓
□ SaltOS Solutions SL	B12345678	P2025-0086	2025-02-28	20366.2	✗	✗
□ SaltOS Solutions SL	B12345678	P2025-0085	2025-03-23	13391.1	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0084	2025-03-19	5749.18	✓	✓
□ SaltOS Solutions SL	B12345678	F2025-0083	2025-03-20	17851.4	✓	✗
□ SaltOS Solutions SL	B12345678	P2025-0082	2025-02-25	10986.4	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0081	2025-03-13	38.1	✓	✗
□ SaltOS Solutions SL	B12345678	F2025-0080	2025-04-03	21984.8	✓	✓
□ SaltOS Solutions SL	B12345678	P2025-0079	2025-03-27	15250	✗	✗

Closed
Paid

Proforma
Date
Invoice
Date

mm/dd/yyyy
mm/dd/yyyy
mm/dd/yyyy
mm/dd/yyyy

Customer
CIF

Address
City
Province / State

Zip
Country

Notes

Concepts

Description
Quantity
Price
Discount
Tax
Total

Taxes

Tax
Base
Total
Subtotal
Tax
Total

Payment method

Due date
mm/dd/yyyy
Paid
Paid date
mm/dd/yyyy

Status

New files

In **view** mode, it shows a finalized invoice in read-only mode.

SaltOS Dashboard Applications Admin

Customer	CIF	Invoice	Date	Total	Closed	Paid
□ SaltOS Solutions SL	B12345678	P2025-0100	2025-03-28	16687.6	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0099	2025-04-04	12880.5	✓	✓
□ SaltOS Solutions SL	B12345678	P2025-0098	2025-04-16	5483.32	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0097	2025-04-15	9399.21	✓	✗
□ SaltOS Solutions SL	B12345678	F2025-0096	2025-03-27	1662.88	✓	✗
□ SaltOS Solutions SL	B12345678	F2025-0095	2025-04-14	3492.23	✓	✗
□ SaltOS Solutions SL	B12345678	F2025-0094	2025-03-28	6859.89	✓	✗
□ SaltOS Solutions SL	B12345678	P2025-0093	2025-04-08	615.18	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0092	2025-04-13	2056.47	✓	✗
□ SaltOS Solutions SL	B12345678	P2025-0091	2025-03-25	4261.76	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0090	2025-04-14	5696.69	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0089	2025-04-13	1763.59	✓	✓
□ SaltOS Solutions SL	B12345678	F2025-0088	2025-04-11	12090.3	✓	✗
□ SaltOS Solutions SL	B12345678	F2025-0087	2025-03-23	7504.76	✓	✓
□ SaltOS Solutions SL	B12345678	P2025-0086	2025-02-28	20366.2	✗	✗
□ SaltOS Solutions SL	B12345678	P2025-0085	2025-03-23	13391.1	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0084	2025-03-19	5749.18	✓	✓
□ SaltOS Solutions SL	B12345678	F2025-0083	2025-03-20	17851.4	✓	✗
□ SaltOS Solutions SL	B12345678	P2025-0082	2025-02-25	10986.4	✗	✗
□ SaltOS Solutions SL	B12345678	F2025-0081	2025-03-13	38.1	✓	✗
□ SaltOS Solutions SL	B12345678	F2025-0080	2025-04-03	21984.8	✓	✓
□ SaltOS Solutions SL	B12345678	P2025-0079	2025-03-27	15250	✗	✗

Closed
Paid

Proforma
Date
Invoice
Date

mm/dd/yyyy
mm/dd/yyyy
mm/dd/yyyy
mm/dd/yyyy

Customer
CIF

Address
City
Province / State

Zip
Country

Notes

Concepts

Description
Quantity
Price
Discount
Tax
Total

Taxes

Tax
Base
Total
Subtotal
Tax
Total

Payment method

Due date
mm/dd/yyyy
Paid
Paid date
mm/dd/yyyy

Status

In **edit** mode, it allows modifying a draft invoice or correcting information before finalization.

The form includes the following fields:

Description	Quantity	Price	Discount	Tax	Total
strategize seamless web services	4.52	110.29	0	10	498.51
redefine granular web-readiness	7.31	114.12	0	4	834.22
engage impactful supply-chains	7.77	120.27	10	4	841.65
brand collaborative convergence	5.12	41.1	0	0	216.43
engineer impactful interfaces	3.62	37.52	0	10	135.82
optimize front-end technologies	7.62	11.74	5	21	84.99
scale dynamic schemas	7.1	197.81	0	0	1404.45
strategize mission-critical channels	7.12	41.96	0	4	298.76
harness scalable content	9.77	44.13	0	4	431.15
target granular networks	6.34	194.25	0	0	1231.55
enable visionary Info-mediarlies	3.21	32.57	0	4	104.55
envisioneer B2B e-tailers	7.19	191.37	0	0	1375.95
architect 24/365 experiences	7.98	198.32	0	21	1582.59
implement bricks-and-clicks networks	8	174.33	0	4	1394.64
transform B2B architectures	6.69	94.57	0	21	632.67
brand frictionless markets	1.74	102.95	0	10	179.13
transform synergistic Info-mediarlies	1.21	118.87	0	4	143.83
reinvent scalable initiatives	7.24	27.97	0	0	202.5
deliver cross-platform applications	5.36	132.47	0	10	710.04

The form includes the following fields:

- **Closed:** Indicates whether the invoice has been finalized and is no longer editable.
- **Paid:** Indicates whether the invoice has been marked as paid.
- **Proforma:** Reference or marker indicating the invoice originated from a pro forma.
- **Date:** The official issue date of the invoice.
- **Invoice:** The internal reference or invoice number assigned to the document.
- **Customer:** The client who receives the invoice and is responsible for payment.
- **CIF:** The fiscal identification code of the customer at the time of invoicing.
- **Address:** The customer's address used for invoicing purposes.
- **City:** City corresponding to the customer's invoicing address.
- **Province / State:** Province or state in the billing address.
- **Zip:** Postal code in the billing address.
- **Country:** Country included in the customer's billing information.
- **Notes:** Internal comments or conditions attached to the invoice.
- **Concepts:** List of items or services included in the invoice.
- **Taxes:** Breakdown of taxes applied to the invoice.
- **Totals:** Final financial summary: subtotal, tax, and grand total.
- **Payment method:** The method of payment selected for the invoice.
- **Due date:** The date by which the invoice should be paid.
- **Amount paid:** Amount received.
- **Paid date:** The date on which the payment was received.

- Status: Current status of the invoice (e.g., draft, closed, cancelled).

Invoices also include line items (product, quantity, price, discount, tax) and a breakdown of applied taxes.

28.4 Delete

Invoices can only be deleted if they are in draft status. A confirmation prompt is shown before the operation.

Once an invoice is finalized and/or linked to a payment, deletion is restricted.

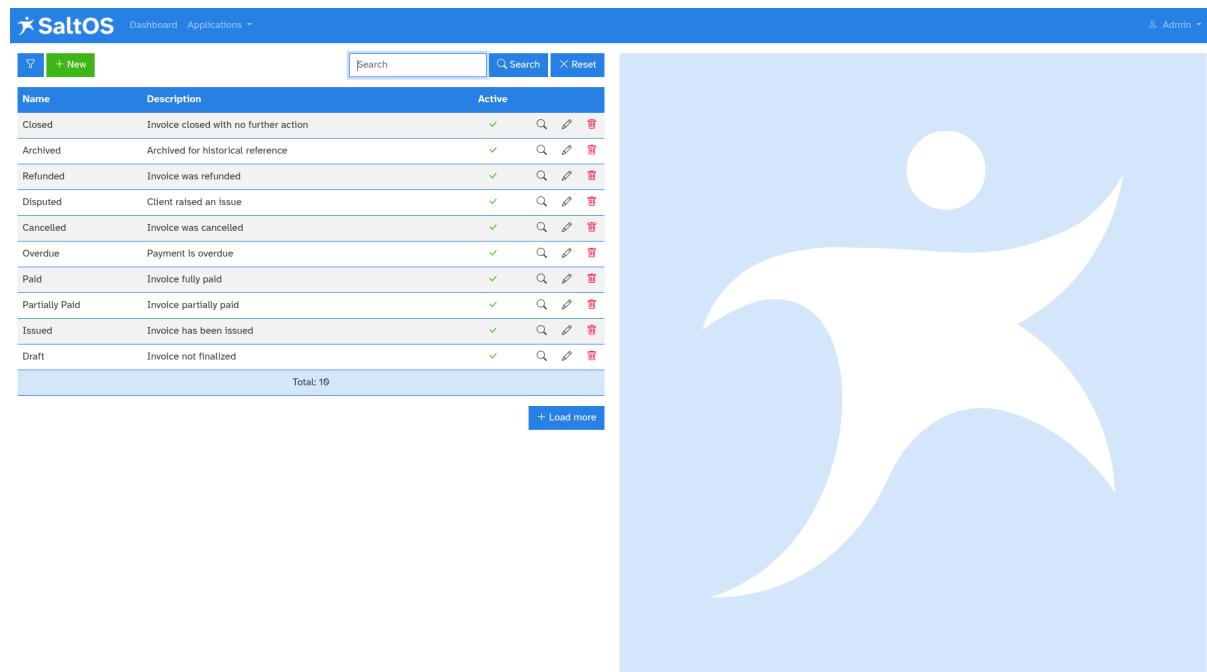
29 Invoices Status

29.1 Description

The Invoices Status application allows you to define the different states that an invoice can go through during its lifecycle. These statuses help distinguish between draft, issued, paid, or cancelled invoices, enabling better financial tracking and reporting.

Common statuses may include "Draft", "Pending", "Paid", or "Cancelled".

29.2 List view



Name	Description	Active
Closed	Invoice closed with no further action	✓
Archived	Archived for historical reference	✓
Refunded	Invoice was refunded	✓
Disputed	Client raised an issue	✓
Cancelled	Invoice was cancelled	✓
Overdue	Payment is overdue	✓
Paid	Invoice fully paid	✓
Partially Paid	Invoice partially paid	✓
Issued	Invoice has been issued	✓
Draft	Invoice not finalized	✓

Total: 10

+ Load more

The following fields are displayed in the list view:

- Name: The name of the invoice status (e.g., Paid, Cancelled).
- Description: Explanation of the status usage or meaning.
- Active: Indicates whether this status is currently in use.

29.3 Form view

This view is used to create, view or edit invoice status entries.

In **create** mode, a new tax rule can be defined.

The screenshot shows the SaltOS application interface for creating a new invoice status entry. The top navigation bar includes the SaltOS logo, Dashboard, Applications, and Admin. The main area has a blue header with 'Active' status and a search bar. On the left is a table listing ten invoice status types: Closed, Archived, Refunded, Disputed, Cancelled, Overdue, Paid, Partially Paid, Issued, and Draft. Each row has a 'Name' column, a 'Description' column, and a 'Active' column with a checked checkbox. To the right of the table is a form for entering new data. It has fields for 'Name' (containing 'Closed') and 'Description' (containing 'Invoice closed with no further action'). Below the form are 'Create' and 'Cancel' buttons. At the bottom of the page is a 'Load more' button.

Name	Description	Active
Closed	Invoice closed with no further action	✓
Archived	Archived for historical reference	✓
Refunded	Invoice was refunded	✓
Disputed	Client raised an issue	✓
Cancelled	Invoice was cancelled	✓
Overdue	Payment is overdue	✓
Paid	Invoice fully paid	✓
Partially Paid	Invoice partially paid	✓
Issued	Invoice has been issued	✓
Draft	Invoice not finalized	✓

In **view** mode, tax details are visible but not editable.

The screenshot shows the SaltOS application interface for viewing an invoice status entry. The top navigation bar includes the SaltOS logo, Dashboard, Applications, and Admin. The main area has a blue header with 'Active' status and a search bar. On the left is a table listing ten invoice status types. The 'Closed' row is selected, indicated by a blue background. To the right of the table is a form for viewing the selected entry. It has fields for 'Name' (containing 'Closed') and 'Description' (containing 'Invoice closed with no further action'). Below the form is an 'Info' button. To the right are 'Edit', 'Delete', and 'Close' buttons. At the bottom of the page is a 'Load more' button.

Name	Description	Active
Closed	Invoice closed with no further action	✓
Archived	Archived for historical reference	✓
Refunded	Invoice was refunded	✓
Disputed	Client raised an issue	✓
Cancelled	Invoice was cancelled	✓
Overdue	Payment is overdue	✓
Paid	Invoice fully paid	✓
Partially Paid	Invoice partially paid	✓
Issued	Invoice has been issued	✓
Draft	Invoice not finalized	✓

In **edit** mode, existing values can be updated.

The screenshot shows two views of the SaltOS application's 'Statuses' module. On the left, a list of statuses is displayed in a table with columns for Name, Description, and Active. The 'Active' column contains a toggle switch, and the other columns have search and edit icons. The 'Closed' status is selected, showing its details on the right. The details view includes fields for Name (set to 'Closed'), Description ('Invoice closed with no further action'), and Active (set to 'Active'). Below the form are 'Save' and 'Cancel' buttons.

Name	Description	Active
Closed	Invoice closed with no further action	<input checked="" type="checkbox"/>
Archived	Archived for historical reference	<input checked="" type="checkbox"/>
Refunded	Invoice was refunded	<input checked="" type="checkbox"/>
Disputed	Client raised an issue	<input checked="" type="checkbox"/>
Cancelled	Invoice was cancelled	<input checked="" type="checkbox"/>
Overdue	Payment is overdue	<input checked="" type="checkbox"/>
Paid	Invoice fully paid	<input checked="" type="checkbox"/>
Partially Paid	Invoice partially paid	<input checked="" type="checkbox"/>
Issued	Invoice has been issued	<input checked="" type="checkbox"/>
Draft	Invoice not finalized	<input checked="" type="checkbox"/>

Total: 10

+ Load more

The form includes the following fields:

- Active: Allows enabling or disabling the status.
- Name: Label of the status.
- Description: Optional clarification on when to use this status.

29.4 Delete

Statuses can only be deleted if no invoice is assigned to them.

Deactivation is preferred when in use, to preserve consistency across records.

30 Payment Methods

30.1 Description

The Payment Methods application is used to define and manage the types of payments accepted by the organization. These methods are later used in invoices to indicate how the customer will pay (e.g., bank transfer, credit card, cash). This module ensures consistency and traceability across the billing process.

30.2 List view



Name	Description	Active	Default	Actions
Other	Other form of payment not listed above.	✓	✗	
Gift Card	Payment using a store-issued gift card.	✓	✗	
Prepaid	Payment made using prepaid balance or voucher.	✓	✗	
Direct Debit	Payment directly withdrawn from a bank account.	✓	✗	
Cryptocurrency	Payment made using Bitcoin or other cryptocurrencies.	✓	✗	
Mobile Payment	Payment made using a mobile wallet or app.	✓	✗	
Cheque	Payment made using a paper cheque.	✓	✗	
PayPal	Payment made using a PayPal account.	✓	✗	
Bank Transfer	Payment made via wire transfer or electronic banking.	✓	✓	
Debit Card	Payment made using a debit card linked to a bank account.	✓	✗	
Credit Card	Payment made using a credit card.	✓	✗	
Cash	Payment made in physical currency.	✓	✗	

The following fields are displayed in the list view:

- Name: Name of the payment method (e.g., Cash, Bank Transfer, Credit Card).
- Description: Additional details or clarification about how the payment method is used.
- Active: Indicates whether this payment method is currently available.
- Default: Specifies if this is the default payment method when creating new records.

30.3 Form view

This view is used to create, view or edit payment method records.

In **create** mode, a new payment method is added.

The screenshot shows the SaltOS application interface. On the left, there is a sidebar with a search bar and a 'New' button. The main area displays a table of payment methods with columns for Name, Description, Active, and Default. The 'Prepaid' row is selected, highlighted in blue. On the right, a detailed view of the 'Prepaid' method is shown with fields for Name, Description, New files, and New note. Buttons for Create and Cancel are at the bottom.

Name	Description	Active	Default
Other	Other form of payment not listed above.	✓	✗
Gift Card	Payment using a store-issued gift card.	✓	✗
Prepaid	Payment made using prepaid balance or voucher.	✓	✗
Direct Debit	Payment directly withdrawn from a bank account.	✓	✗
Cryptocurrency	Payment made using Bitcoin or other cryptocurrencies.	✓	✗
Mobile Payment	Payment made using a mobile wallet or app.	✓	✗
Cheque	Payment made using a paper cheque.	✓	✗
PayPal	Payment made using a PayPal account.	✓	✗
Bank Transfer	Payment made via wire transfer or electronic banking.	✓	✓
Debit Card	Payment made using a debit card linked to a bank account.	✓	✗
Credit Card	Payment made using a credit card.	✓	✗
Cash	Payment made in physical currency.	✓	✗

Total: 12

+ Load more

Active Default

Name: Prepaid

Description: Payment made using prepaid balance or voucher.

New files: Choose Files No file chosen

New note:

Create Cancel

In **view** mode, fields are shown in read-only mode.

This screenshot is similar to the previous one, but the 'Prepaid' row is not selected. Instead, a modal dialog is open on the right side, showing the same details for the 'Prepaid' method. The 'Info' tab is selected in the dialog. Buttons for Edit, Delete, and Close are visible at the bottom of the dialog.

Name	Description	Active	Default
Other	Other form of payment not listed above.	✓	✗
Gift Card	Payment using a store-issued gift card.	✓	✗
Prepaid	Payment made using prepaid balance or voucher.	✓	✗
Direct Debit	Payment directly withdrawn from a bank account.	✓	✗
Cryptocurrency	Payment made using Bitcoin or other cryptocurrencies.	✓	✗
Mobile Payment	Payment made using a mobile wallet or app.	✓	✗
Cheque	Payment made using a paper cheque.	✓	✗
PayPal	Payment made using a PayPal account.	✓	✗
Bank Transfer	Payment made via wire transfer or electronic banking.	✓	✓
Debit Card	Payment made using a debit card linked to a bank account.	✓	✗
Credit Card	Payment made using a credit card.	✓	✗
Cash	Payment made in physical currency.	✓	✗

Total: 12

+ Load more

Active Default

Name: Prepaid

Description: Payment made using prepaid balance or voucher.

Info

Edit Delete Close

In **edit** mode, the details can be modified.

The screenshot shows the SaltOS application interface. On the left, there's a sidebar with 'SaltOS' logo, 'Dashboard', and 'Applications'. On the right, a top navigation bar has 'Admin' and a dropdown menu. Below the navigation is a search bar with 'Search', 'Reset', and icons for 'Active' and 'Default' status. A table lists various payment methods with columns for 'Name', 'Description', 'Active', and 'Default'. The 'Active' column contains green checkmarks and red X's. The 'Default' column contains icons for edit and delete. The table includes rows for 'Other', 'Gift Card', 'Prepaid', 'Direct Debit', 'Cryptocurrency', 'Mobile Payment', 'Cheque', 'PayPal', 'Bank Transfer', 'Debit Card', 'Credit Card', and 'Cash'. A note at the bottom says 'Total: 12' and a 'Load more' button is visible. On the right side, there's a detailed view for the 'Prepaid' method. It has fields for 'Name' (Prepaid), 'Description' (Payment made using prepaid balance or voucher), 'New files' (Choose Files, No file chosen), and 'New note' (empty). At the bottom are 'Save' and 'Cancel' buttons.

The form includes the following fields:

- Active: Indicates whether this payment method is currently available.
- Default: Specifies if this is the default payment method when creating new records.
- Name: Name of the payment method (e.g., Cash, Bank Transfer, Credit Card).
- Description: Additional details or clarification about how the payment method is used.

30.4 Delete

Payment methods can be deleted if not used in invoices.

If already referenced, they should be marked as inactive instead of deleted.

31 Products

31.1 Description

The Products application manages the catalog of goods and services offered by the organization. It stores essential details like reference code, price, stock levels, tax rates, and classification. Products can be linked to quotes, invoices, and purchases, making this module fundamental to sales and inventory workflows.

31.2 List view

Name	Code	Description
Compatible bifurcated website	PRD-0190	Season billion street.
Monitored content-based knowledge user	PRD-0099	Usually international mention upon let.
Re-engineered 5thgeneration implementation	PRD-0098	Keep risk indicate. Edge side mean thousand.
Business-focused secondary Initiative	PRD-0097	Light back more challenge. Drug actually continue.
Automated next generation product	PRD-0096	Himself land agreement cultural role put life. Authority while perform same.
Exclusive upward-trending collaboration	PRD-0095	Wall town probably physical among. Involve begin top require. Make personal address inside.
Future-proofed cohesive approach	PRD-0094	Agree could best summer. Many area development student while area move. Goal father wide voice.
Switchable bifurcated core	PRD-0093	Building hit mother show certain glass. Something bar world fly.
Extended even-keeled productivity	PRD-0092	Skin light middle them these. Like program interview discuss. Whole name religious field and room.
Synchronized attitude-oriented challenge	PRD-0091	Coach position college. Into result while season amount. Night defense your yourself with.
Ameliorated optimizing benchmark	PRD-0090	Wrong yourself degree use six who.
Open-architected interactive initiative	PRD-0089	Do character deal. Situation production majority break all.
Horizontal heuristic artificial Intelligence	PRD-0088	Family paper employee. Ground sport federal pass skin.
Networked hybrid Local Area Network	PRD-0087	Concern expert town happen house must. Per police through international.

The following fields are displayed in the list view:

- Name: The full name of the product or service, as it will appear in listings and documents.
- Code: Internal product code used to uniquely identify the item.
- Description: Detailed explanation or specifications of the product.

31.3 Form view

This view is used for creating, editing or viewing a product entry.

In **create** mode, the form is empty for entering a new product.

SaltOS Dashboard Applications Admin

Name	Code	Description
Compatible bifurcated website	PRD-0100	Season billion street.
Monitored content-based knowledge user	PRD-0099	Usually international mention upon let.
Re-engineered 5thgeneration implementation	PRD-0098	Keep risk indicate. Edge side mean thousand.
Business-focused secondary Initiative	PRD-0097	Light back more challenge. Drug actually continue.
Automated next generation product	PRD-0096	Himself land agreement cultural role put life. Authority while perform same.
Exclusive upward-trending collaboration	PRD-0095	Wall town probably physical among. Involve begin top require. Make personal address inside.
Future-proofed cohesive approach	PRD-0094	Agree could best summer. Many area development student while area move. Goal father wide voice.
Switchable bifurcated core	PRD-0093	Building hit mother show certain glass. Something bar world fly.
Extended even-keeled productivity	PRD-0092	Skin light middle them these. Like program interview discuss. Whole name religious field and room.
Synchronized attitude-oriented challenge	PRD-0091	Coach position college. Into result while season amount. Night defense your yourself with.
Ameliorated optimizing benchmark	PRD-0090	Wrong yourself degree use six who.
Open-architected interactive initiative	PRD-0089	Do character deal. Situation production majority break all.
Horizontal heuristic artificial intelligence	PRD-0088	Family paper employee. Ground sport federal pass skin.
Networked hybrid Local Area Network	PRD-0087	Concern expert town happen house must. Per police through international.

Active
Name:

Code:

Type:

Price:

Cost:

Margin:

Tax:

Description:

Category:

Measure unit:

Brand:

Model:

Barcode:

Stock:

Min stock:

Max stock:

Location:

Image Url:

New files:

New note:

In **view** mode, all fields are read-only and show detailed information.

SaltOS Dashboard Applications Admin

Name	Code	Description
Compatible bifurcated website	PRD-0100	Season billion street.
Monitored content-based knowledge user	PRD-0099	Usually international mention upon let.
Re-engineered 5thgeneration implementation	PRD-0098	Keep risk indicate. Edge side mean thousand.
Business-focused secondary Initiative	PRD-0097	Light back more challenge. Drug actually continue.
Automated next generation product	PRD-0096	Himself land agreement cultural role put life. Authority while perform same.
Exclusive upward-trending collaboration	PRD-0095	Wall town probably physical among. Involve begin top require. Make personal address inside.
Future-proofed cohesive approach	PRD-0094	Agree could best summer. Many area development student while area move. Goal father wide voice.
Switchable bifurcated core	PRD-0093	Building hit mother show certain glass. Something bar world fly.
Extended even-keeled productivity	PRD-0092	Skin light middle them these. Like program interview discuss. Whole name religious field and room.
Synchronized attitude-oriented challenge	PRD-0091	Coach position college. Into result while season amount. Night defense your yourself with.
Ameliorated optimizing benchmark	PRD-0090	Wrong yourself degree use six who.
Open-architected interactive initiative	PRD-0089	Do character deal. Situation production majority break all.
Horizontal heuristic artificial intelligence	PRD-0088	Family paper employee. Ground sport federal pass skin.
Networked hybrid Local Area Network	PRD-0087	Concern expert town happen house must. Per police through international.

Active
Name:

Code:

Type:

Price:

Cost:

Margin:

Tax:

Description:

Category:

Measure unit:

Brand:

Model:

Barcode:

Stock:

Min stock:

Max stock:

Location:

Image Url:

In **edit** mode, the product data can be updated or corrected.

Name	Code	Description
Compatible bifurcated website	PRD-0100	Season billion street.
Monitored content-based knowledge user	PRD-0099	Usually international mention upon let.
Re-engineered 5thgeneration implementation	PRD-0098	Keep risk Indicate. Edge side mean thousand.
Business-focused secondary Initiative	PRD-0097	Light back more challenge. Drug actually continue.
Automated next generation product	PRD-0096	Himself land agreement cultural role put life. Authority while perform same.
Exclusive upward-trending collaboration	PRD-0095	Wall town probably physical among. Involve begin top require. Make personal address inside.
Future-proofed cohesive approach	PRD-0094	Agree could best summer. Many area development student while area move. Goal father wide voice.
Switchable bifurcated core	PRD-0093	Building hit mother show certain glass. Something bar world fly.
Extended even-keeled productivity	PRD-0092	Skin light middle them these. Like program interview discuss. Whole name religious field and room.
Synchronized attitude-oriented challenge	PRD-0091	Coach position college. Into result while season amount. Night defense your yourself with.
Ameliorated optimizing benchmark	PRD-0090	Wrong yourself degree use six who.
Open-architected interactive initiative	PRD-0089	Do character deal. Situation production majority break all.
Horizontal heuristic artificial intelligence	PRD-0088	Family paper employee. Ground sport federal pass skin.
Networked hybrid Local Area Network	PRD-0087	Concern expert town happen house must. Per police through international.

The form includes the following fields:

- Active: Indicates whether the product is available for use in transactions.
- Name: The full name of the product or service, as it will appear in listings and documents.
- Code: Internal product code used to uniquely identify the item.
- Type: The classification of the product, such as item, service, or subscription.
- Price: The selling price per unit, excluding taxes or discounts.
- Cost: The internal purchase or manufacturing cost, used to calculate margins.
- Margin: Calculated profit margin based on price and cost.
- Tax: Default tax rate applied when the product is used in sales.
- Description: Detailed explanation or specifications of the product.
- Category: Product family or group, used for classification or filtering.
- Measure unit: Unit of measurement (e.g., unit, kg, hour).
- Brand: Brand name or manufacturer of the product.
- Model: Model number or variant of the product.
- Barcode: Barcode associated with the product, used for scanning or labeling.
- Stock: Current stock level available in the inventory.
- Min stock: Minimum stock threshold for restocking alerts.
- Max stock: Maximum stock level allowed in storage.
- Location: Physical or logical storage location of the product.
- Image Url: Link or path to an image representing the product.

31.4 Delete

Products can be deleted from the list view if they are not referenced in active documents. A confirmation prompt will appear before deletion.

Products linked to invoices, quotes or purchases are protected from deletion.

32 Product Categories

32.1 Description

The Product Categories application is used to group products into families or collections for easier classification. Categories are helpful for filtering, reporting, organizing catalogs, and applying common business rules.

Typical categories might include "Hardware", "Software", "Services", or "Accessories".

32.2 List view



Name	Description	Active
Other	Unclassified category	✓   
Consumables	Items that are used and replaced	✓   
Accessories	Complementary items	✓   
Cloud	Hosted online services	✓   
Maintenance	Post-sale repair or update services	✓   
Training	Courses and educational content	✓   
Licenses	Software or intellectual property licenses	✓   
Services	Technical or support services	✓   
Software	Applications and systems	✓   
Hardware	Physical devices and equipment	✓   

The following fields are displayed in the list view:

- Name: Name of the category.
- Description: Description of what products the category includes.
- Active: Indicates whether this category can be assigned to products.

32.3 Form view

This view is used to create, view or edit product category records.

In **create** mode, a new tax rule can be defined.

The screenshot shows the SaltOS application management interface. On the left, there's a sidebar with a search bar and a 'New' button. The main area displays a table of categories with columns for Name, Description, and Active status. A modal window is open for creating a new category, showing fields for Name (set to 'Other') and Description ('Unclassified category'). The modal includes 'Create' and 'Cancel' buttons. The bottom of the screen shows a footer with a 'Load more' button.

Name	Description	Active
Other	Unclassified category	<input checked="" type="checkbox"/>
Consumables	Items that are used and replaced	<input checked="" type="checkbox"/>
Accessories	Complementary Items	<input checked="" type="checkbox"/>
Cloud	Hosted online services	<input checked="" type="checkbox"/>
Maintenance	Post-sale repair or update services	<input checked="" type="checkbox"/>
Training	Courses and educational content	<input checked="" type="checkbox"/>
Licenses	Software or intellectual property licenses	<input checked="" type="checkbox"/>
Services	Technical or support services	<input checked="" type="checkbox"/>
Software	Applications and systems	<input checked="" type="checkbox"/>
Hardware	Physical devices and equipment	<input checked="" type="checkbox"/>

In **view** mode, tax details are visible but not editable.

The screenshot shows the SaltOS application management interface. The left sidebar has a search bar and a 'New' button. The main area displays a table of categories. A modal window is open for viewing a category named 'Other' (Description: 'Unclassified category'). The modal includes an 'Info' button and 'Edit', 'Delete', and 'Close' buttons. The bottom of the screen shows a footer with a 'Load more' button.

Name	Description	Active
Other	Unclassified category	<input checked="" type="checkbox"/>
Consumables	Items that are used and replaced	<input checked="" type="checkbox"/>
Accessories	Complementary Items	<input checked="" type="checkbox"/>
Cloud	Hosted online services	<input checked="" type="checkbox"/>
Maintenance	Post-sale repair or update services	<input checked="" type="checkbox"/>
Training	Courses and educational content	<input checked="" type="checkbox"/>
Licenses	Software or intellectual property licenses	<input checked="" type="checkbox"/>
Services	Technical or support services	<input checked="" type="checkbox"/>
Software	Applications and systems	<input checked="" type="checkbox"/>
Hardware	Physical devices and equipment	<input checked="" type="checkbox"/>

In **edit** mode, existing values can be updated.

The screenshot shows the SaltOS application's 'Applications' section. On the left, there is a list of categories with columns for Name, Description, and Active status. The 'Active' column contains icons for edit, delete, and mark as active. The 'Name' column lists categories like Other, Consumables, Accessories, Cloud, Maintenance, Training, Licenses, Services, Software, and Hardware. The 'Description' column provides a brief description for each category. A search bar at the top right allows filtering by name. On the right, a detailed view of the 'Other' category is shown. It includes fields for Name (set to 'Other'), Description ('Unclassified category'), and an Active checkbox (which is checked). Below these fields are 'Save' and 'Cancel' buttons. At the bottom left of the main list area, it says 'Total: 10'. A 'Load more' button is located at the bottom center.

The form includes the following fields:

- Active: Enables or disables the category for selection.
- Name: Label of the category as shown in the product form.
- Description: Optional clarification or notes about this category.

32.4 Delete

Categories can only be deleted if they are not assigned to any product.

When in use, they should be disabled instead.

33 Product Types

33.1 Description

The Product Types application is used to classify products and services based on their nature or behavior. This classification helps distinguish between physical goods, services, subscriptions, or other internal categories used for reporting or automation.

Examples of types include "Product", "Service", "Subscription", or "Bundle".

33.2 List view

Name	Description	Active
Other	Miscellaneous	✓
Consulting	Professional consulting	✓
Training	Course or educational service	✓
Maintenance	Post-sale service	✓
Digital	Downloadable or virtual product	✓
Kit	Grouped set of products	✓
Subscription	Recurring billed item	✓
License	Software or intellectual license	✓
Service	Service provided to customer	✓
Good	Physical product	✓

Total: 10 [+ Load more](#)

The following fields are displayed in the list view:

- Name: Label of the product type.
- Description: Optional description to clarify the purpose of the type.
- Active: Indicates whether the type is available when creating products.

33.3 Form view

This view is used to create, view or edit product type records.

In **create** mode, a new tax rule can be defined.

The screenshot shows the SaltOS application interface. On the left, there is a sidebar with a logo and navigation links: 'Dashboard', 'Applications', and 'Admin'. The main area has a blue header bar with the SaltOS logo and the word 'Active'.

Left Panel (List View):

- Buttons: 'Y' (blue), '+ New' (green).
- Search bar: 'Search' (with icon), 'Q Search' (with icon), 'X Reset'.
- Table header: 'Name', 'Description', 'Active'.
- Table rows:
 - Other: Miscellaneous (Active)
 - Consulting: Professional consulting (Active)
 - Training: Course or educational service (Active)
 - Maintenance: Post-sale service (Active)
 - Digital: Downloadable or virtual product (Active)
 - Kit: Grouped set of products (Active)
 - Subscription: Recurring billed item (Active)
 - License: Software or intellectual license (Active)
 - Service: Service provided to customer (Active)
 - Good: Physical product (Active)
- Total: 10
- Buttons: '+ Load more'.

Right Panel (Detail View):

- Form fields:
 - Active: Radio button (selected).
 - Name: Input field containing 'Other'.
 - Description: Text area containing 'Miscellaneous'.
- Buttons: '✓ Create' (green), '✗ Cancel' (red).

In **view** mode, tax details are visible but not editable.

The screenshot shows the SaltOS application interface. The layout is identical to the previous one, but the 'Other' category is selected in the list, and its details are displayed in the right panel.

Left Panel (List View):

- Buttons: 'Y' (blue), '+ New' (green).
- Search bar: 'Search' (with icon), 'Q Search' (with icon), 'X Reset'.
- Table header: 'Name', 'Description', 'Active'.
- Table rows:
 - Other: Miscellaneous (Active)
 - Consulting: Professional consulting (Active)
 - Training: Course or educational service (Active)
 - Maintenance: Post-sale service (Active)
 - Digital: Downloadable or virtual product (Active)
 - Kit: Grouped set of products (Active)
 - Subscription: Recurring billed item (Active)
 - License: Software or intellectual license (Active)
 - Service: Service provided to customer (Active)
 - Good: Physical product (Active)
- Total: 10
- Buttons: '+ Load more'.

Right Panel (Detail View):

- Form fields:
 - Active: Radio button (selected).
 - Name: Input field containing 'Other'.
 - Description: Text area containing 'Miscellaneous'.
 - Info button: A blue button labeled 'Info' with a dropdown arrow.
- Buttons: '✗ Edit' (red), '✗ Delete' (red), '✗ Close' (red).

In **edit** mode, existing values can be updated.

The screenshot shows the SaltOS application's 'Types' list and a detailed view of a type named 'Other'. The list on the left shows various product types with columns for Name, Description, and Active status. The 'Active' column contains a blue switch icon. The 'Name' column lists categories like Other, Consulting, Training, Maintenance, Digital, Kit, Subscription, License, Service, and Good. The 'Description' column provides a brief description for each category. The 'Active' column contains a blue switch icon. The 'Other' row is selected, highlighted with a blue border. On the right, a detailed view form is displayed with fields for Name (set to 'Other'), Description (set to 'Miscellaneous'), and an Active checkbox (which is checked). Below the form are 'Save' and 'Cancel' buttons.

The form includes the following fields:

- Active: Controls availability in product forms.
- Name: Name shown in the type selection when creating a product.
- Description: Notes about the type's intended use.

33.4 Delete

Types can be deleted only if they are not linked to any product.

Otherwise, deactivation is the recommended action.

34 Taxes

34.1 Description

The Taxes application is used to define and manage tax rates applied to products, quotes, and invoices. It serves as a central repository of tax types such as VAT, sales tax, or exemptions. Each record includes the name, rate, and status, ensuring consistent tax application across the entire ERP system.

34.2 List view

Name	Description	Value	Active	Default
Exempt / Not subject	Operations exempt or not subject to VAT	0	✓	✗
VAT 4%	Super-reduced VAT rate of 4%	4	✓	✗
VAT 10%	Reduced VAT rate of 10%	10	✓	✗
VAT 21%	Standard VAT rate of 21%	21	✓	✓

The following fields are displayed in the list view:

- Name: Name or label used to identify the tax (e.g., VAT 21%).
- Description: Optional explanation or additional details about the tax rule or context of use.
- Value: Percentage value of the tax to be applied (e.g., 21 for 21%).
- Active: Indicates whether this tax is available for selection in documents.
- Default: Indicates whether this tax is selected automatically when creating new documents.

34.3 Form view

This view is used to create, view or edit tax entries.

In **create** mode, a new tax rule can be defined.

The screenshot shows the SaltOS application interface. On the left, there is a list of VAT rates with columns for Name, Description, Value, Active, and Default. The 'Active' column contains green checkmarks for most rows, except for 'Exempt / Not subject' which has a red 'X'. The 'Default' column also contains green checkmarks. A search bar and a 'Load more' button are at the bottom of the list. On the right, a detailed view modal is open for the 'VAT 21%' row. It shows the 'Name' (VAT 21%), 'Value' (21), and 'Description' (Standard VAT rate of 21%). There are tabs for 'Info', 'Edit', 'Delete', and 'Close'. Buttons for 'Create' and 'Cancel' are at the bottom right.

In **view** mode, tax details are visible but not editable.

This screenshot is similar to the previous one, but the 'Edit' tab is selected in the detailed view modal for the 'VAT 21%' row. The modal now shows the 'Name' (VAT 21%), 'Value' (21), and 'Description' (Standard VAT rate of 21%) with input fields. The 'Edit' button is highlighted in blue at the bottom right of the modal.

In **edit** mode, existing values can be updated.

The screenshot shows the SaltOS Tax Management application. On the left, there is a list of VAT rates with columns for Name, Description, Value, Active, and Default. The VAT 21% row is selected. On the right, a detailed view of the VAT 21% tax is shown, including fields for Name (VAT 21%), Value (21), Description (Standard VAT rate of 21%), New files (Choose Files, No file chosen), and New note (empty). At the bottom right are Save and Cancel buttons.

Name	Description	Value	Active	Default
Exempt / Not subject	Operations exempt or not subject to VAT	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
VAT 4%	Super-reduced VAT rate of 4%	4	<input checked="" type="checkbox"/>	<input type="checkbox"/>
VAT 10%	Reduced VAT rate of 10%	10	<input checked="" type="checkbox"/>	<input type="checkbox"/>
VAT 21%	Standard VAT rate of 21%	21	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Total: 4

+ Load more

Active Default

Name: VAT 21% Value: 21

Description: Standard VAT rate of 21%

New files: Choose Files No file chosen

New note:

✓ Save ✖ Cancel

The form includes the following fields:

- Active: Indicates whether this tax is available for selection in documents.
- Default: Indicates whether this tax is selected automatically when creating new documents.
- Name: Name or label used to identify the tax (e.g., VAT 21%).
- Value: Percentage value of the tax to be applied (e.g., 21 for 21%).
- Description: Optional explanation or additional details about the tax rule or context of use.

34.4 Delete

Taxes can only be deleted if they are not used in any invoice or product.

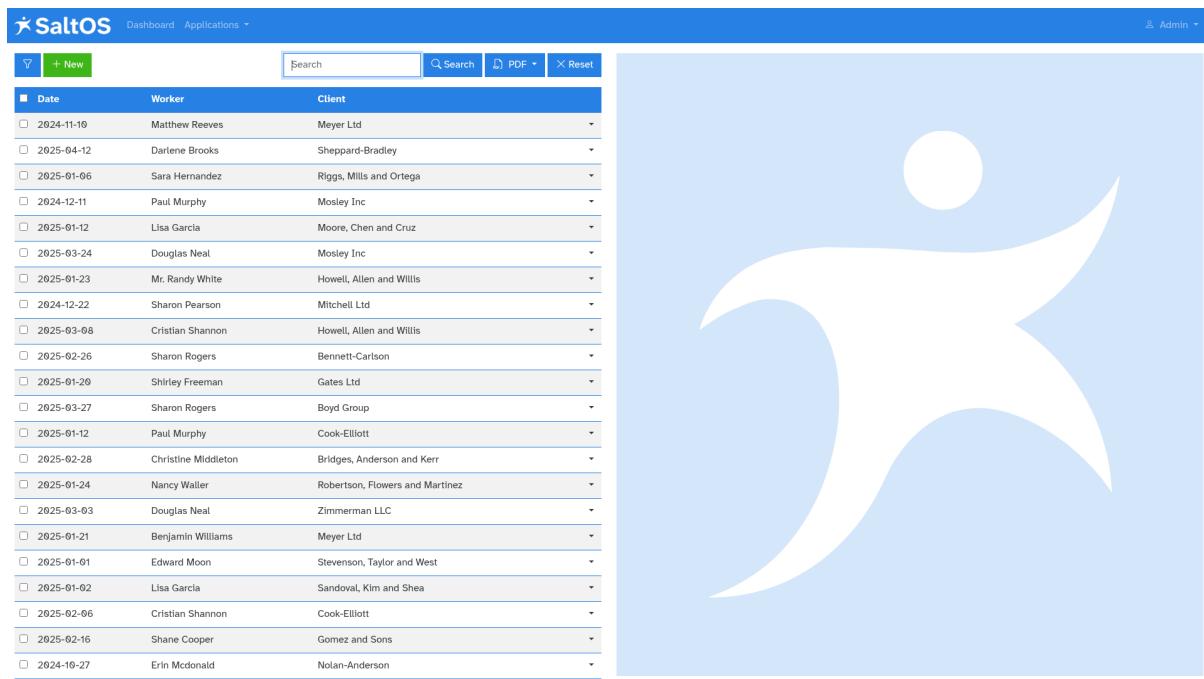
If a tax is in use, it must be deactivated instead to preserve system integrity.

35 Workorders

35.1 Description

The Workorders application is used to register, plan, and track work tasks or service jobs requested by customers. Each work order includes information about the requester, the service required, status, dates, assigned staff, and associated notes or attachments. This module is essential for managing operational activities, such as technical support, installations, or field services.

35.2 List view



Date	Worker	Client
2024-11-10	Matthew Reeves	Meyer Ltd
2025-04-12	Darlene Brooks	Sheppard-Bradley
2025-01-06	Sara Hernandez	Riggs, Mills and Ortega
2024-12-11	Paul Murphy	Mosley Inc
2025-01-12	Lisa Garcia	Moore, Chen and Cruz
2025-03-24	Douglas Neal	Mosley Inc
2025-01-23	Mr. Randy White	Howell, Allen and Willis
2024-12-22	Sharon Pearson	Mitchell Ltd
2025-03-08	Cristian Shannon	Howell, Allen and Willis
2025-02-26	Sharon Rogers	Bennett-Carlson
2025-01-29	Shirley Freeman	Gates Ltd
2025-03-27	Sharon Rogers	Boyd Group
2025-01-12	Paul Murphy	Cook-Elliott
2025-02-28	Christine Middleton	Bridges, Anderson and Kerr
2025-01-24	Nancy Waller	Robertson, Flowers and Martinez
2025-03-03	Douglas Neal	Zimmerman LLC
2025-01-21	Benjamin Williams	Meyer Ltd
2025-01-01	Edward Moon	Stevenson, Taylor and West
2025-01-02	Lisa Garcia	Sandoval, Kim and Shea
2025-02-06	Cristian Shannon	Cook-Elliott
2025-02-16	Shane Cooper	Gomez and Sons
2024-10-27	Erin McDonald	Nolan-Anderson

The following fields are displayed in the list view:

- Date: The date when the work order was created or scheduled.
- Worker: The employee or technician assigned to carry out the task.
- Client: The customer who requested the service or task.

35.3 Form view

This view is used to create, edit, or view a work order.

In **create** mode, the form allows registering a new task to be performed.

SaltOS Dashboard Applications Admin

<input type="checkbox"/>	Date	Worker	Client
<input type="checkbox"/>	2024-11-10	Matthew Reeves	Meyer Ltd
<input type="checkbox"/>	2025-04-12	Darlene Brooks	Sheppard-Bradley
<input type="checkbox"/>	2025-01-06	Sara Hernandez	Riggs, Mills and Ortega
<input type="checkbox"/>	2024-12-11	Paul Murphy	Mosley Inc
<input type="checkbox"/>	2025-01-12	Lisa Garcia	Moore, Chen and Cruz
<input type="checkbox"/>	2025-03-24	Douglas Neal	Mosley Inc
<input type="checkbox"/>	2025-01-23	Mr. Randy White	Howell, Allen and Willis
<input type="checkbox"/>	2024-12-22	Sharon Pearson	Mitchell Ltd
<input type="checkbox"/>	2025-03-08	Cristian Shannon	Howell, Allen and Willis
<input type="checkbox"/>	2025-02-26	Sharon Rogers	Bennett-Carlson
<input type="checkbox"/>	2025-01-29	Shirley Freeman	Gates Ltd
<input type="checkbox"/>	2025-03-27	Sharon Rogers	Boyd Group
<input type="checkbox"/>	2025-01-12	Paul Murphy	Cook-Elliott
<input type="checkbox"/>	2025-02-28	Christine Middleton	Bridges, Anderson and Kerr
<input type="checkbox"/>	2025-01-24	Nancy Waller	Robertson, Flowers and Martinez
<input type="checkbox"/>	2025-03-03	Douglas Neal	Zimmerman LLC
<input type="checkbox"/>	2025-01-21	Benjamin Williams	Meyer Ltd
<input type="checkbox"/>	2025-01-01	Edward Moon	Stevenson, Taylor and West
<input type="checkbox"/>	2025-01-02	Lisa Garcia	Sandoval, Kim and Shea
<input type="checkbox"/>	2025-02-06	Cristian Shannon	Cook-Elliott
<input type="checkbox"/>	2025-02-16	Shane Cooper	Gomez and Sons
<input type="checkbox"/>	2024-10-27	Erin McDonald	Nolan-Anderson

Date: mm/dd/yyyy
 Worker:
 Client:
 Description:
 Hours: Price: Total: Invoice:
 New files: Choose Files No file chosen
 New note:
 Buttons: ✓ Create ✗ Cancel

In **view** mode, the information is shown as read-only.

SaltOS Dashboard Applications Admin

<input type="checkbox"/>	Date	Worker	Client
<input type="checkbox"/>	2024-11-10	Matthew Reeves	Meyer Ltd
<input type="checkbox"/>	2025-04-12	Darlene Brooks	Sheppard-Bradley
<input type="checkbox"/>	2025-01-06	Sara Hernandez	Riggs, Mills and Ortega
<input type="checkbox"/>	2024-12-11	Paul Murphy	Mosley Inc
<input type="checkbox"/>	2025-01-12	Lisa Garcia	Moore, Chen and Cruz
<input type="checkbox"/>	2025-03-24	Douglas Neal	Mosley Inc
<input type="checkbox"/>	2025-01-23	Mr. Randy White	Howell, Allen and Willis
<input type="checkbox"/>	2024-12-22	Sharon Pearson	Mitchell Ltd
<input type="checkbox"/>	2025-03-08	Cristian Shannon	Howell, Allen and Willis
<input type="checkbox"/>	2025-02-26	Sharon Rogers	Bennett-Carlson
<input type="checkbox"/>	2025-01-29	Shirley Freeman	Gates Ltd
<input type="checkbox"/>	2025-03-27	Sharon Rogers	Boyd Group
<input type="checkbox"/>	2025-01-12	Paul Murphy	Cook-Elliott
<input type="checkbox"/>	2025-02-28	Christine Middleton	Bridges, Anderson and Kerr
<input type="checkbox"/>	2025-01-24	Nancy Waller	Robertson, Flowers and Martinez
<input type="checkbox"/>	2025-03-03	Douglas Neal	Zimmerman LLC
<input type="checkbox"/>	2025-01-21	Benjamin Williams	Meyer Ltd
<input type="checkbox"/>	2025-01-01	Edward Moon	Stevenson, Taylor and West
<input type="checkbox"/>	2025-01-02	Lisa Garcia	Sandoval, Kim and Shea
<input type="checkbox"/>	2025-02-06	Cristian Shannon	Cook-Elliott
<input type="checkbox"/>	2025-02-16	Shane Cooper	Gomez and Sons
<input type="checkbox"/>	2024-10-27	Erin McDonald	Nolan-Anderson

Date: 11/10/2024
 Worker: Matthew Reeves
 Client: Meyer Ltd
 Description: Week course bad despite whether factor night. Box off method information.
 Hours: 4.58 Price: 76.53 Total: 350.51 Invoice: F2025-0089
 Buttons: Info PDF ✗ Edit ✗ Delete ✗ Close

In **edit** mode, the data can be updated based on progress or feedback.

The screenshot shows the SaltOS Workorders application interface. On the left, there is a list of work orders with columns for Date, Worker, and Client. On the right, a detailed view of a single work order is displayed, including fields for Date (11/10/2024), Worker (Matthew Reeves), Client (Meyer Ltd), Description (Week course bad despite whether factor night. Box off method information.), Hours (4.58), Price (76.53), Total (350.51), Invoice (F2025-0989), New files (Choose Files: No file chosen), and New note (empty). At the bottom right are Save and Cancel buttons.

The form includes the following fields:

- Date: The date when the work order was created or scheduled.
- Worker: The employee or technician assigned to carry out the task.
- Client: The customer who requested the service or task.
- Description: Details about the nature or objective of the work to be done.
- Hours: Estimated or actual number of hours allocated to the task.
- Price: Hourly rate or fixed price agreed for the work.
- Total: Final amount calculated based on price and hours.
- Invoice: Invoice number or reference associated with the completed work.

35.4 Delete

Workorders can be deleted only if they are not linked to completed services or logged actions.

A confirmation prompt is displayed before deletion. Deactivation is preferred if you want to retain history without exposing the record.

36 Groups

36.1 Description

The Groups application is used to define roles or user categories within SaltOS4. Each group aggregates permissions that determine what its members can see or do in the system. Groups simplify the administration of access control by allowing permission management at the group level instead of per user.

36.2 List view

Code	Name	Description	Active
admin	Admin	Admin group	✓

Total: 1

+ More groups

The following fields are displayed in the list view:

- Code: Internal identifier or reference code of the group.
- Name: Name or title used to identify the group.
- Description: Explanation of the purpose or scope of the group.
- Active: Indicates whether this group is enabled for use.

36.3 Form view

This view is used to create, view or edit user groups.

In **create** mode, a new group is defined.

The screenshot shows the SaltOS application interface for managing groups. At the top, there's a navigation bar with the SaltOS logo, 'Dashboard', 'Applications', and an 'Admin' dropdown. Below the navigation is a search bar with 'Search', 'Search', and 'Reset' buttons.

Group Details View:

- Header:** Active, Code: admin, Name: Admin, Description: Admin group.
- Buttons:** Active, + New group, Search, Reset.
- Table:** Shows one group entry: admin (Admin) with a checkmark in the Active column.
- Total:** 1
- More Groups:** A blue button labeled '+ More groups'.

Users: A list showing 'Admin (admin)' with two blue navigation arrows (right and left).

Applications and permissions: A grid table showing permission levels (Allow or Deny) for various applications across different main categories like main, menu, create, etc.

	main	menu	create	widget	action	config	help
login	Allow						
dashboard	Allow					Allow	Allow
tester	Allow	Allow					
users		Allow					
groups		Allow	Allow				
dashboard_widgets	Allow					Allow	Allow
widgets				Allow			
emails							
emails_accounts							
pushlog							
cronlog							
uploadlog							
configlog							
trashlog							
tokenslog							
certs							
fileslog							
customers							

In **view** mode, the group details and assigned permissions are shown.

The screenshot shows the SaltOS application interface for managing groups in edit mode. The layout is identical to the view mode, but the group details are now editable.

Group Details View (Edit Mode):

- Header:** Active, Code: admin, Name: Admin, Description: Admin group.
- Buttons:** Active, + New group, Search, Reset.
- Table:** Shows one group entry: admin (Admin) with a checkmark in the Active column.
- Total:** 1
- More Groups:** A blue button labeled '+ More groups'.

Users: A list showing 'Admin (admin)' with two blue navigation arrows (right and left).

Applications and permissions: A grid table showing permission levels (Allow or Deny) for various applications across different main categories like main, menu, create, etc.

	main	menu	create	widget	action	config	help
login	Allow						
dashboard	Allow					Allow	Allow
tester	Allow	Allow					
users	Allow	Allow	Allow	Allow	Allow	Allow	Allow
groups	Allow	Allow	Allow	Allow	Allow	Allow	Allow
dashboard_widgets	Allow					Allow	Allow
widgets				Allow			
emails	Allow	Allow	Allow	Allow	Allow	Allow	Allow
emails_accounts	Allow	Allow	Allow	Allow	Allow	Allow	Allow
pushlog	Allow	Allow	Allow	Allow	Allow	Allow	Allow
cronlog	Allow	Allow	Allow	Allow	Allow	Allow	Allow
uploadlog	Allow	Allow	Allow	Allow	Allow	Allow	Allow
configlog	Allow	Allow	Allow	Allow	Allow	Allow	Allow
trashlog	Allow	Allow	Allow	Allow	Allow	Allow	Allow
tokenslog	Allow	Allow	Allow	Allow	Allow	Allow	Allow
certs	Allow	Allow	Allow	Allow	Allow	Allow	Allow
fileslog	Allow	Allow	Allow	Allow	Allow	Allow	Allow
customers	Allow	Allow	Allow	Allow	Allow	Allow	Allow

In **edit** mode, you can update the group's name, description, and permission set.

The screenshot shows the SaltOS application interface. At the top, there's a navigation bar with the SaltOS logo, Dashboard, Applications, and Admin. Below the navigation is a search bar with fields for Search, Reset, and a magnifying glass icon. A sidebar on the left has a 'New group' button and a 'More groups' link.

Code	Name	Description	Active
admin	Admin	Admin group	<input checked="" type="checkbox"/>

Total: 1

On the right, there's a detailed view of the 'admin' group:

- Active:** A toggle switch is set to Active.
- Code:** admin
- Name:** Admin
- Description:** Admin group
- Users:** Admin (admin) is listed with a sync icon.
- Applications and permissions:** A grid table showing permissions for various applications like login, dashboard, tester, etc., across main, menu, create, widget, action, config, and help operations.

The form includes the following fields:

- Active: Indicates whether this group is enabled for use.
- Code: Internal identifier or reference code of the group.
- Name: Name or title used to identify the group.
- Description: Explanation of the purpose or scope of the group.
- Users: List of users assigned to this group.
- Applications and permissions: Matrix of allowed apps and operations granted to this group.

36.4 Delete

Groups can be deleted only if no users are assigned to them.

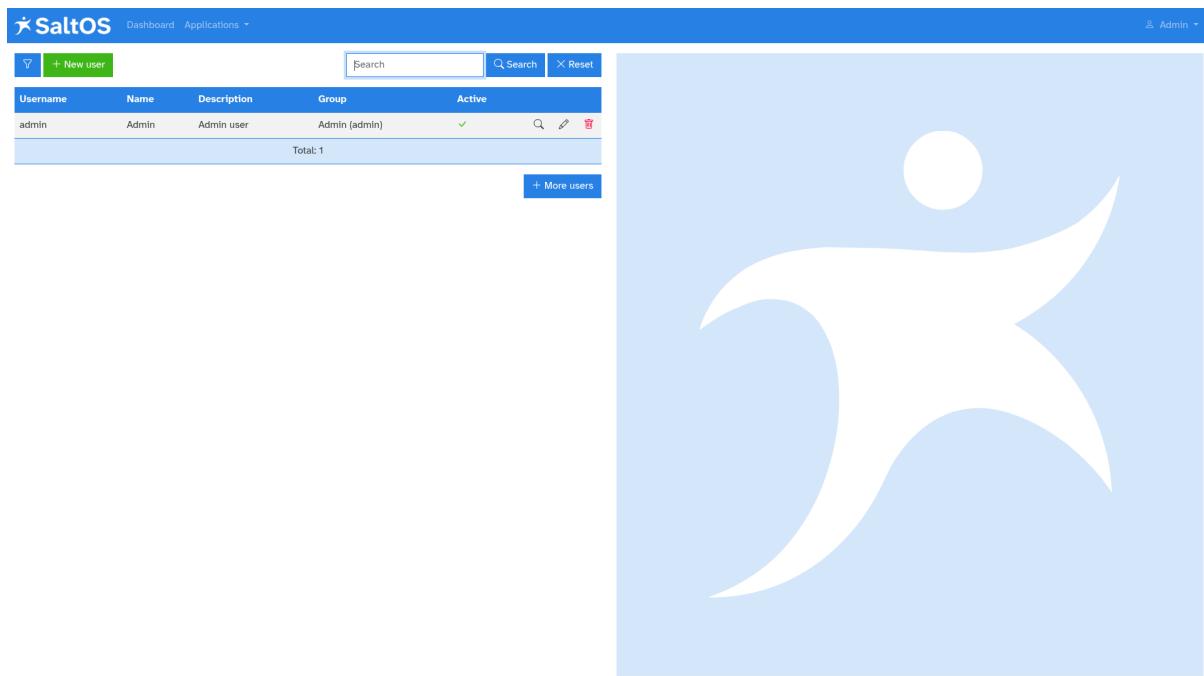
If the group is in use, it is recommended to disable it to preserve historical access information.

37 Users

37.1 Description

The Users application is used to manage the accounts that have access to the SaltOS4 system. Each user is assigned credentials, roles, and permissions, and can optionally be linked to an employee profile. This module is essential for access control, personalization, and audit tracking.

37.2 List view



The screenshot shows the SaltOS user management interface. At the top, there is a navigation bar with the SaltOS logo, 'Dashboard', 'Applications', and a user dropdown labeled 'Admin'. Below the navigation bar is a search bar with fields for 'Search', 'Q Search', and 'X Reset'. To the left of the search bar are two buttons: a blue one with a downward arrow and a green one labeled '+ New user'. The main area contains a table with the following columns: Username, Name, Description, Group, and Active. A single row is shown for the user 'admin', which has the values: Admin, Admin, Admin user, Admin (admin), and Active (indicated by a green checkmark). To the right of the table is a large, light blue background image featuring a white, stylized human figure in a dynamic pose.

Username	Name	Description	Group	Active
admin	Admin	Admin user	Admin (admin)	✓

Total: 1

+ More users

The following fields are displayed in the list view:

- Username: Unique login name used to access the system.
- Name: Full name of the user, used for display and identification.
- Description: Internal comments or notes about the user profile.
- Group: User group or role assigned for permission control.
- Active: Indicates whether the user account is currently enabled.

37.3 Form view

This view is used to create, view or edit user accounts.

In **create** mode, the form is used to register a new user with login credentials.

SaltOS Dashboard Applications Admin

Username	Name	Description	Group	Active
admin	Admin	Admin user	Admin (admin)	<input checked="" type="checkbox"/>

Total: 1 [+ More users](#)

Search

Active

Username: Group:

Name: New password: Retype new password:

Description:

Start time: End time:

Days:

Groups:

	main	menu	create	widget	action	config	help
login	Allow						
dashboard	Allow						
tester	Allow	Allow					
users			Allow				
groups							
dashboard_widgets	Allow					Allow	Allow
widgets							
emails							
emails_accounts							
pushlog							

In **view** mode, the account details are shown without edit capability.

SaltOS Dashboard Applications Admin

Username	Name	Description	Group	Active
admin	Admin	Admin user	Admin (admin)	<input checked="" type="checkbox"/>

Total: 1 [+ More users](#)

Search

Username: Group:

Name: New password: Retype new password:

Description:

Start time: End time:

Days:

Groups:

	main	menu	create	widget	action	config	help
login	Allow						
dashboard	Allow						
tester	Allow	Allow					
users	Allow	Allow	Allow	Allow	Allow	Allow	Allow
groups	Allow	Allow	Allow	Allow	Allow	Allow	Allow
dashboard_widgets	Allow						
widgets							
emails	Allow	Allow	Allow	Allow	Allow	Allow	Allow
emails_accounts	Allow	Allow	Allow	Allow	Allow	Allow	Allow
pushlog	Allow	Allow	Allow	Allow	Allow	Allow	Allow

In **edit** mode, you can update user information or reset credentials.

The screenshot shows the SaltOS user management interface. On the left, a table lists users with columns: Username, Name, Description, Group, and Active. The 'admin' user is selected, showing details on the right. The details include:

- Active:** A toggle switch set to "Active".
- Username:** admin
- Group:** Admin (admin)
- Name:** Admin
- New password:** (empty field)
- Retype new password:** (empty field)
- Description:** Admin user
- Start time:** 12:00:00 AM
- End time:** 11:59:59 PM
- Days:** A list of days from Monday to Sunday, with checkboxes for Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday.
- Groups:** Admin (admin) (selected)
- Applications and permissions:** A grid table showing permission levels (Allow or Deny) for various applications across main, menu, create, widget, action, config, and help categories.

The form includes the following fields:

- **Active:** Indicates whether the user account is currently enabled.
- **Username:** Unique login name used to access the system.
- **Group:** User group or role assigned for permission control.
- **Name:** Full name of the user, used for display and identification.
- **New password:** New password to assign to the user (for resets or changes).
- **Retype password:** Confirmation of the new password to avoid typos.
- **Description:** Internal comments or notes about the user profile.
- **Start:** Start date from which the user account is valid.
- **End:** Expiration date after which the user cannot log in.
- **Days:** Days of the week on which the user is allowed to access the system.
- **Groups:** Additional groups or roles associated with this user.
- **Applications and permissions:** Detailed matrix of app access and specific actions allowed for the user.
- **Passwords history:** List of previously used passwords for audit and reuse prevention.

37.4 Delete

User accounts can be deleted if they have not logged in or are not linked to any activity log.

Otherwise, it is recommended to disable them instead of deletion for audit purposes.