

# User Manual

SaltOS 4.0 r2018

April 2025

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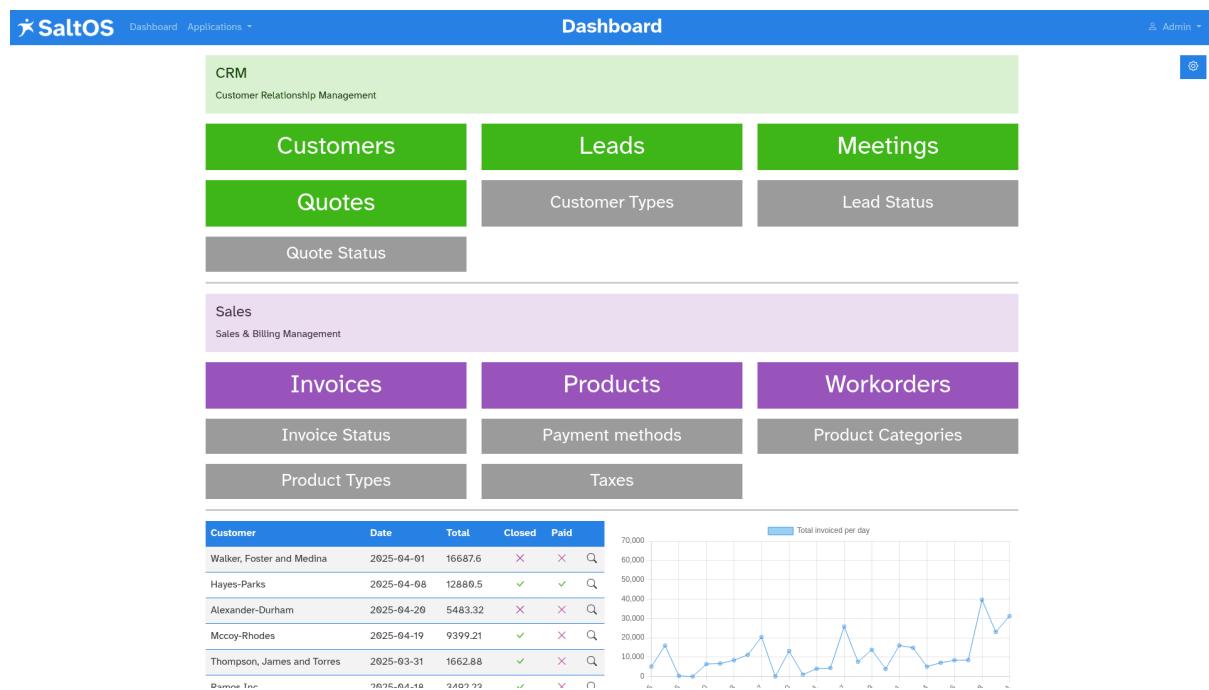
# 1 Dashboard

## 1.1 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.

## 1.2 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)

## 1.3 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.

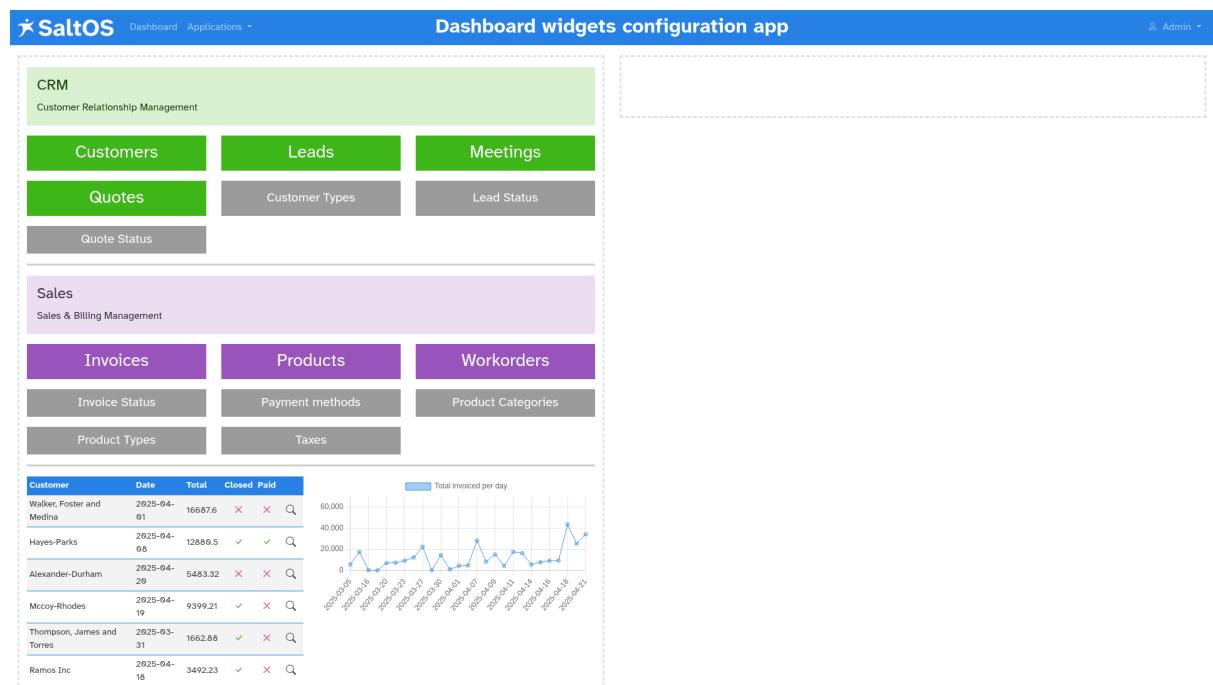
## 2 Dashboard configuration

### 2.1 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.

### 2.2 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.

## 2.3 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.

## 2.4 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

# 3 Customers

## 3.1 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.

## 3.2 List view

Name	CIF	City	Country	Active
Hudson, Noble and Andrews	D79421459	Lake Thomasview	Liechtenstein	✓ ▾
Stevenson, Taylor and West	N8&691370	Port Jonathanmouth	Malawi	✗ ▾
Morris, Becker and Johnston	G92939823	Castillochester	Haiti	✓ ▾
Zimmerman LLC	H56239167	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 Wills	G12891772	Calnside	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	E72358694	Jenniferland	Mexico	✓ ▾
Wilson Inc	A89994905	Port Andrew	Kazakhstan	✗ ▾
Francis Group	P49542024	Ericside	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.

## 3.3 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.

**New - Customers**

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	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
 CIF

Name
Address
City
Province / State

Zip
Country

Email
Phone
Website

Notes

Type

Choose Files
No file chosen

New note

Create
 Cancel

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

**Detail - Customers**

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	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
 CIF

Name
Address
City
Province / State

Zip
Country

Email
Phone
Website

Notes

Type

Info
 Edit
 Delete
 Close

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

SaltOS Dashboard Applications ▾

### Modify - Customers

Admin ▾

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	A89994995	Port Andrew	Kazakhstan	✗ ▾
Francis Group	P49542624	Ericside	Latvia	✗ ▾
Estes and Sons	A51066336	Annetown	Mozambique	✓ ▾

Active

Name

CIF

Address

City

Province / State

Zip

Country

Email

Phone

Website

Notes

Type

New files

No file chosen

New note

Save  Cancel

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.

### 3.4 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.

## 4 Customer Types

### 4.1 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".

### 4.2 List view

The screenshot shows the 'List - Customer Types' page from the SaltOS application. At the top, there's a navigation bar with the SaltOS logo, 'Dashboard', 'Applications', and an 'Admin' dropdown. Below the header is a search bar with 'Search', 'Reset', and a 'New' button. The main area contains a table with the following data:

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

A large, semi-transparent blue graphic of a stylized human figure is positioned on the right side of the page.

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.

### 4.3 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.

**New - Customer Types**

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

Total: 10

+ Load more

Active

Name:

Description:

Create  Cancel

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

**Detail - Customer Types**

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

Total: 10

+ Load more

Active

Name: Other

Description: Other unspecified type

Info  Edit  Delete  Close

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

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

Total: 10 [+ Load more](#)

Active

Name:

Description:

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.

## 4.4 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.

# 5 Leads

## 5.1 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.

## 5.2 List view

Name	CIF	City	Country	Active
Stone-Adkins	D94941433	Kennethland	Central African Republic	X ▾
Contreras-Rivera	U94364956	Cannonside	Papua New Guinea	✓ ▾
Chase-Greene	H32823338	Gouldfurt	Kazakhstan	✓ ▾
Trevino Inc	R55649464	Rachevillia	Nicaragua	✓ ▾
Clark-Miller	F72056985	Latoyburgh	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	EI Salvador	✓ ▾
Cortez LLC	C62178936	Lawsonstad	United States Minor Outlying Islands	X ▾
Anderson LLC	C12069270	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.

## 5.3 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.

**New - Leads**

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"/>

Form fields (right side):

- Active: Radio button (checked)
- Name: Input field (Stone-Adkins)
- CIF: Input field (D94941433)
- Address: Input field (5969 Stacey Land Suite 564)
- City: Input field (Kennethland)
- Province / State: Input field (South Carolina)
- Zip: Input field (25510)
- Country: Input field (Central African Republic)
- Email: Input field (welliott@king.com)
- Phone: Input field (962.694.4285x49271)
- Website: Input field (<https://spears.com>)
- Notes: Text area (Through capital box dog rich successful south sister table office bar fly.)
- Contact: Input field (Michael Rivera)
- Source: Input field (Referral)
- Status: Input field (New)
- Assigned To: Input field (Douglas Neal)

Buttons: ✓ Create, ✖ Cancel

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

**Detail - Leads**

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"/>

Form fields (right side):

- Active: Radio button (checked)
- Name: Input field (Stone-Adkins)
- CIF: Input field (D94941433)
- Address: Input field (5969 Stacey Land Suite 564)
- City: Input field (Kennethland)
- Province / State: Input field (South Carolina)
- Zip: Input field (25510)
- Country: Input field (Central African Republic)
- Email: Input field (welliott@king.com)
- Phone: Input field (962.694.4285x49271)
- Website: Input field (<https://spears.com>)
- Notes: Text area (Through capital box dog rich successful south sister table office bar fly.)
- Contact: Input field (Michael Rivera)
- Source: Input field (Referral)
- Status: Input field (New)
- Assigned To: Input field (Douglas Neal)

Buttons: ⚡ Edit, 🗑 Delete, ✖ Close

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

The screenshot shows the 'Modify - Leads' page in SaltOS. At the top, there's a navigation bar with 'Dashboard' and 'Applications'. On the right, it says 'Admin'. Below the header, there's a search bar with 'Search', 'Search', and 'Reset' buttons. To the left is a table of leads with columns: Name, CIF, City, Country, and Active. The table lists numerous entries with names like Stone-Adkins, Contreras-Rivera, Chase-Greene, etc., and cities like Kennethland, Cannonside, Gouldfurt, etc. To the right of the table are several input fields: 'Name' (Stone-Adkins), 'CIF' (D94941433), 'Address' (5969 Stacey Land Suite 564), 'City' (Kennethland), 'Province / State' (South Carolina), 'Zip' (25510), 'Country' (Central African Republic), 'Email' (welliott@king.com), 'Phone' (962.694.4285x49271), 'Website' (https://spears.com), and a 'Notes' text area containing placeholder text. Below these are dropdowns for 'Contact' (Michael Rivera), 'Source' (Referral), 'Status' (New), and 'Assigned To' (Douglas Neal). There are also 'Choose Files' and 'New note' buttons. At the bottom right are 'Save' and 'Cancel' buttons.

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.

## 5.4 Delete

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

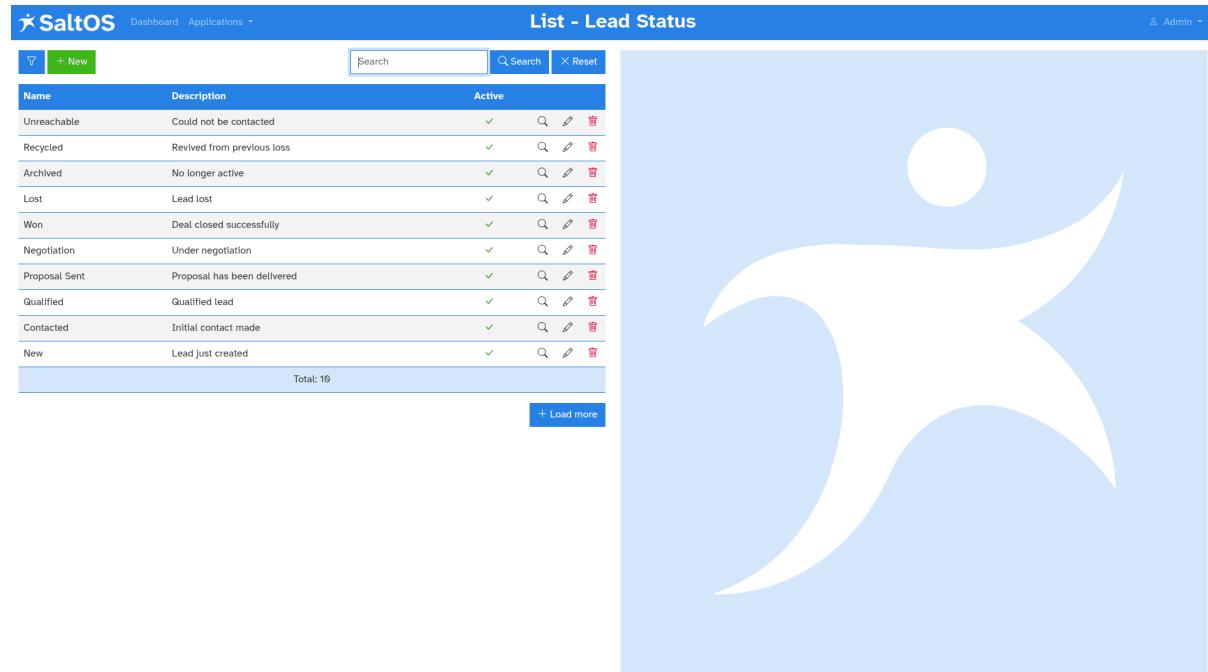
This action is irreversible and requires appropriate permissions.

## 6 Leads Status

## 6.1 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".

## 6.2 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.

## 6.3 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.

**New - Lead Status**

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](#)

Active

Name:

Description:

Create Cancel

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

**Detail - Lead Status**

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](#)

Active

Name:

Description:

Info Edit Delete Close

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](#)

Active

Name:

Description:

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.

## 6.4 Delete

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

Otherwise, the status should be marked as inactive.

# 7 Meetings

## 7.1 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.

## 7.2 List view

Title	Location	Start Time	Customer
Optimized bifurcated capability	Robertfurt	2024-06-16 10:01:12	Murphy, Glenn and Perez
Realigned incremental forecast	Lake Alexander	2024-05-07 12:03:54	Collins, Martinez and Chambers
Down-sized leadingedge 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	2024-08-18 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.

## 7.3 Form view

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

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

**New - Meetings**

List of Meetings				Form Fields		
Title	Location	Start Time	Customer	Title	Location	Related Customer
Optimized bifurcated capability	Robertfurt	2024-06-16 10:16:12	Murphy, Glenn and Perez	<input type="text"/>	<input type="text"/>	<input type="button"/>
Realigned incremental forecast	Lake Alexander	2024-05-07 12:03:54	Collins, Martinez and Chambers	<input type="text"/>	<input type="text"/>	<input type="button"/>
Down-sized leadingedge algorithm	Port Erika	2024-04-22 11:57:23	Brown LLC	Participants		
Open-source needs-based access	Codyville	2025-01-05 17:02:03	Summers Ltd	Agenda		
Customizable optimizing process improvement	Richardsonmouth	2025-01-11 15:43:24	Brown Ltd	Topics Approved		
Decentralized fault-tolerant budgetary management	Julieview	2025-03-30 03:27:01	Sandoval, Kim and Shea	Topics Rejected		
Digitized zero-defect neural-net	West David	2024-08-25 08:36:42	Day, Munoz and Ferguson	Topics Pending		
Intuitive dynamic encryption	East Garymouth	2024-10-23 18:29:51	Holder Inc	New files		
Diverse actuating support	Angelaberg	2024-05-03 09:56:33	Harrison-Medina	<input type="button"/> Choose Files	<input type="text"/> No file chosen	
Stand-alone optimizing array	Kellermouth	2024-08-28 11:49:54	Scott Group	New note		
Re-engineered multi-state paradigm	Markland	2025-02-17 18:58:15	Dennis-Casey	<input type="text"/>		
Implemented incremental ability	Lake Michael	2025-04-01 20:10:52	Wang-Miller	<input type="button"/> ✓ Create <input type="button"/> × Cancel		
Cross-platform needs-based open system	Joshuaville	2024-08-18 18:55:34	Estes and Sons			
Optimized context-sensitive framework	Joelhaven	2024-12-04 14:04:41	Erickson-Rocha			

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

**Detail - Meetings**

List of Meetings				Form Fields		
Title	Location	Start Time	Customer	Title	Location	Related Customer
Optimized bifurcated capability	Robertfurt	2024-06-16 10:16:12	Murphy, Glenn and Perez	<input type="text"/>	<input type="text"/>	<input type="button"/>
Realigned incremental forecast	Lake Alexander	2024-05-07 12:03:54	Collins, Martinez and Chambers	<input type="text"/>	<input type="text"/>	<input type="button"/>
Down-sized leadingedge algorithm	Port Erika	2024-04-22 11:57:23	Brown LLC	Participants		
Open-source needs-based access	Codyville	2025-01-05 17:02:03	Summers Ltd	Agenda		
Customizable optimizing process improvement	Richardsonmouth	2025-01-11 15:43:24	Brown Ltd	Topics Approved		
Decentralized fault-tolerant budgetary management	Julieview	2025-03-30 03:27:01	Sandoval, Kim and Shea	Topics Rejected		
Digitized zero-defect neural-net	West David	2024-08-25 08:36:42	Day, Munoz and Ferguson	Topics Pending		
Intuitive dynamic encryption	East Garymouth	2024-10-23 18:29:51	Holder Inc	New files		
Diverse actuating support	Angelaberg	2024-05-03 09:56:33	Harrison-Medina	<input type="button"/> Choose Files	<input type="text"/> No file chosen	
Stand-alone optimizing array	Kellermouth	2024-08-28 11:49:54	Scott Group	New note		
Re-engineered multi-state paradigm	Markland	2025-02-17 18:58:15	Dennis-Casey	<input type="text"/>		
Implemented incremental ability	Lake Michael	2025-04-01 20:10:52	Wang-Miller	<input type="button"/> ✓ Edit <input type="button"/> Delete <input type="button"/> Close		
Cross-platform needs-based open system	Joshuaville	2024-08-18 18:55:34	Estes and Sons			
Optimized context-sensitive framework	Joelhaven	2024-12-04 14:04:41	Erickson-Rocha			

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

SaltOS Dashboard Applications Modify - Meetings Admin

Title				Location	Start Time	Customer	Title			Location
<input type="checkbox"/> Optimized bifurcated capability	Robertfurt	2024-06-16 10:16:12	Murphy, Glenn and Perez				Optimized bifurcated capability		Robertfurt	
<input type="checkbox"/> Realigned incremental forecast	Lake Alexander	2024-05-07 12:03:54	Collins, Martinez and Chambers					Start Time	End Time	Related Customer
<input type="checkbox"/> Down-sized leadingedge algorithm	Port Erika	2024-04-22 11:57:23	Brown LLC				06/16/2024, 10:10:12 AM	06/16/2024, 12:10:12 PM	Murphy, Glenn and Perez	
<input type="checkbox"/> Open-source needs-based access	Codyville	2025-01-05 17:02:03	Summers Ltd				Participants			
<input type="checkbox"/> Customizable optimizing process improvement	Richardsonmouth	2025-01-11 15:43:24	Brown Ltd				Brian Good Rhonda Brown Brittany Carter			
<input type="checkbox"/> Decentralized fault-tolerant budgetary management	Julieview	2025-03-30 03:27:01	Sandoval, Kim and Shea				Agenda			
<input type="checkbox"/> Digitized zero-defect neural-net	West David	2024-08-25 08:36:42	Day, Munoz and Ferguson				Carry wall include child break. Kitchen number language standard culture production purpose. Prepare hot box class force office. Onto house note consumer question.  Himself out recent full. Religious history wrong require.			
<input type="checkbox"/> Intuitive dynamic encryption	East Garymouth	2024-10-23 18:29:51	Holder Inc				Topics Approved			
<input type="checkbox"/> Diverse actuating support	Angelaberg	2024-05-03 00:56:33	Harrison-Medina				Wear blue director father artist. Meeting set where have.			
<input type="checkbox"/> Stand-alone optimizing array	Kellermouth	2024-08-28 11:49:54	Scott Group				Topics Rejected			
<input type="checkbox"/> Re-engineered multi-state paradigm	Markland	2025-02-17 18:58:15	Dennis-Casey				Wonder dream me above work. Participant thank thank big trip example conference head. Around someone necessary evidence front. Order claim mind want artist.			
<input type="checkbox"/> Implemented incremental ability	Lake Michael	2025-04-01 20:10:52	Wang-Miller				Cup be by anyone bad executive bit. Book us even. Guy father chair analysis popular student decade three.  Think though else up modern plant place. Have along goal phone wind.			
<input type="checkbox"/> Cross-platform needs-based open system	Joshuasville	2024-08-18 18:55:34	Estes and Sons				Topics Pending			
<input type="checkbox"/> Optimized context-sensitive framework	Joelhaven	2024-12-04 14:04:41	Erickson-Rocha				Prove much page enjoy director. Interest life family story everything.  Exactly family several. Change capital age attorney write suddenly bad ago. Us trade care able number leg worker onto.  Themselves history information big color wear. Operation economy week audience.			
										New files

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.

## 7.4 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.

## 7.5 PDF generation

The screenshot shows the SaltOS application interface. On the left, there is a sidebar with a list of items under the 'Title' section, each with a checkbox. In the center, a modal window titled 'Modify - Meetings' displays a PDF titled 'meeting\_optimized\_bifurcated\_capability.pdf'. The PDF content includes a 'Meeting Report' section with details like Title, Location, Start Time, End Time, Participants, Agenda, Approved, Rejected, and Pending sections. To the right of the modal, there is a sidebar labeled 'Related Customer' with a dropdown menu showing 'Murphy, Glenn and Perez'. The background of the application shows some blurred text and lists.

From the individual view of a record (view), the user can generate and download a PDF containing all relevant data of that entry.

From the list view (list), it is possible to select multiple records using the checkboxes and generate a single PDF that includes all of them.

## 8 Quotes

### 8.1 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.

## 8.2 List view

Customer	CIF	Quote	Date	Total
Cohen, Hill and Smith	P82569546	Q2025-0190	2025-03-05	713.36
Johnson, Floyd and Weeks	D87626925	Q2025-0099	2025-03-10	6643.39
Bruce, Lee and Munoz	C15192137	Q2025-0098	2025-03-11	794.72
Santos, Clark and Jacobson	W63492535	Q2025-0097	2025-04-17	1545.49
Patel Ltd	B37981168	Q2025-0096	2025-04-09	241.76
Hobbs-Harvey	R89729959	Q2025-0095	2025-03-16	23356.9
Patel-Stewart	V15470612	Q2025-0094	2025-02-23	3372.8
Alvarez, Valenzuela and Chambers	R84858103	Q2025-0093	2025-04-17	13212.8
Casey PLC	W21673781	Q2025-0092	2025-03-15	4714.34
Stewart, Scott and Wilson	N94728752	Q2025-0091	2025-02-22	2556.37
Dawson Group	E12327993	Q2025-0090	2025-03-20	23697.4
Hoffman Group	U92789751	Q2025-0089	2025-03-30	21215.8
Miller Ltd	H59899283	Q2025-0088	2025-04-12	27171.4
Booker-Douglas	J96464697	Q2025-0087	2025-04-01	19128.7
Wood, Donaldson and Hansen	B75663474	Q2025-0086	2025-04-29	818.35
Booker, Rivas and Hines	Q43401155	Q2025-0085	2025-03-07	10145.4
Johnson, Stevenson and Lindsey	S45949218	Q2025-0084	2025-02-22	3666.7
Henderson-Bullock	G43558532	Q2025-0083	2025-03-22	5062.41
Hayden, Harmon and McDonald	A91244486	Q2025-0082	2025-03-22	321.41
Dunlap, Johnson and Rojas	E72564747	Q2025-0081	2025-03-22	26614.7
Perez, Rodriguez and Rollins	E89508055	Q2025-0080	2025-03-18	5335.02
Serrano-Cohen	V87638734	Q2025-0079	2025-03-12	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.

## 8.3 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.

**New - Quotes**

Customer				CIF	Quote	Date	Total
<input type="checkbox"/>	Cohen, Hill and Smith	P82569546	Q2025-0100	2025-03-05	713.36	▼	
<input type="checkbox"/>	Johnson, Floyd and Weeks	D87626925	Q2025-0099	2025-03-10	6048.39	▼	
<input type="checkbox"/>	Bruce, Lee and Munoz	C15192137	Q2025-0098	2025-03-11	794.72	▼	
<input type="checkbox"/>	Santos, Clark and Jacobson	W63402535	Q2025-0097	2025-04-17	1545.49	▼	
<input type="checkbox"/>	Patel Ltd	B37981168	Q2025-0096	2025-04-09	241.76	▼	
<input type="checkbox"/>	Hobbs-Harvey	R89729959	Q2025-0095	2025-03-16	23356.9	▼	
<input type="checkbox"/>	Patel-Stewart	V15470612	Q2025-0094	2025-02-23	3372.8	▼	
<input type="checkbox"/>	Alvarez, Valenzuela and Chambers	R84858103	Q2025-0093	2025-04-17	13212.8	▼	
<input type="checkbox"/>	Casey PLC	W21673781	Q2025-0092	2025-03-15	4714.34	▼	
<input type="checkbox"/>	Stewart, Scott and Wilson	N94728752	Q2025-0091	2025-02-22	2550.37	▼	
<input type="checkbox"/>	Dawson Group	E1232793	Q2025-0090	2025-03-26	23097.4	▼	
<input type="checkbox"/>	Hoffman Group	U92709751	Q2025-0089	2025-03-30	21215.8	▼	
<input type="checkbox"/>	Miller Ltd	H59899283	Q2025-0088	2025-04-12	27171.4	▼	
<input type="checkbox"/>	Booker-Douglas	J96464607	Q2025-0087	2025-04-01	19128.7	▼	
<input type="checkbox"/>	Wood, Donaldson and Hansen	B75663474	Q2025-0086	2025-04-26	8918.35	▼	
<input type="checkbox"/>	Booker, Rivas and Hines	Q43401155	Q2025-0085	2025-03-07	10145.4	▼	
<input type="checkbox"/>	Johnson, Stevenson and Lindsey	S45949218	Q2025-0084	2025-02-22	3666.7	▼	
<input type="checkbox"/>	Henderson-Bullock	G43558532	Q2025-0083	2025-03-22	5062.41	▼	
<input type="checkbox"/>	Hayden, Harmon and McDonald	A91244486	Q2025-0082	2025-03-22	321.41	▼	
<input type="checkbox"/>	Dunlap, Johnson and Rojas	E72564747	Q2025-0081	2025-03-22	26614.7	▼	
<input type="checkbox"/>	Perez, Rodriguez and Rollins	E895686055	Q2025-0080	2025-03-18	5335.62	▼	
<input type="checkbox"/>	Serrano-Cohen	V87638734	Q2025-0079	2025-03-12	15277.3	▼	

Quote:

Date:

Customer:

CIF:

Address:

City:

Province / State:

Zip:

Country:

Notes:   
sense mean single Improve close.

Quote:

Date:

Customer:

CIF:

Address:

City:

Province / State:

Zip:

Country:

Notes:   
sense mean single Improve close.

Description:

Quantity:

Price:

Discount:

Tax:

Total:

Taxes:

Base:

Total:

Subtotal:

Tax:

Total:

Payment method:

Valid until:

Status:

Choose Files:

New note:

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

**Detail - Quotes**

Customer				CIF	Quote	Date	Total
<input type="checkbox"/>	Cohen, Hill and Smith	P82569546	Q2025-0100	2025-03-05	713.36	▼	
<input type="checkbox"/>	Johnson, Floyd and Weeks	D87626925	Q2025-0099	2025-03-10	6048.39	▼	
<input type="checkbox"/>	Bruce, Lee and Munoz	C15192137	Q2025-0098	2025-03-11	794.72	▼	
<input type="checkbox"/>	Santos, Clark and Jacobson	W63402535	Q2025-0097	2025-04-17	1545.49	▼	
<input type="checkbox"/>	Patel Ltd	B37981168	Q2025-0096	2025-04-09	241.76	▼	
<input type="checkbox"/>	Hobbs-Harvey	R89729959	Q2025-0095	2025-03-16	23356.9	▼	
<input type="checkbox"/>	Patel-Stewart	V15470612	Q2025-0094	2025-02-23	3372.8	▼	
<input type="checkbox"/>	Alvarez, Valenzuela and Chambers	R84858103	Q2025-0093	2025-04-17	13212.8	▼	
<input type="checkbox"/>	Casey PLC	W21673781	Q2025-0092	2025-03-15	4714.34	▼	
<input type="checkbox"/>	Stewart, Scott and Wilson	N94728752	Q2025-0091	2025-02-22	2550.37	▼	
<input type="checkbox"/>	Dawson Group	E1232793	Q2025-0090	2025-03-26	23097.4	▼	
<input type="checkbox"/>	Hoffman Group	U92709751	Q2025-0089	2025-03-30	21215.8	▼	
<input type="checkbox"/>	Miller Ltd	H59899283	Q2025-0088	2025-04-12	27171.4	▼	
<input type="checkbox"/>	Booker-Douglas	J96464607	Q2025-0087	2025-04-01	19128.7	▼	
<input type="checkbox"/>	Wood, Donaldson and Hansen	B75663474	Q2025-0086	2025-04-26	8918.35	▼	
<input type="checkbox"/>	Booker, Rivas and Hines	Q43401155	Q2025-0085	2025-03-07	10145.4	▼	
<input type="checkbox"/>	Johnson, Stevenson and Lindsey	S45949218	Q2025-0084	2025-02-22	3666.7	▼	
<input type="checkbox"/>	Henderson-Bullock	G43558532	Q2025-0083	2025-03-22	5062.41	▼	
<input type="checkbox"/>	Hayden, Harmon and McDonald	A91244486	Q2025-0082	2025-03-22	321.41	▼	
<input type="checkbox"/>	Dunlap, Johnson and Rojas	E72564747	Q2025-0081	2025-03-22	26614.7	▼	
<input type="checkbox"/>	Perez, Rodriguez and Rollins	E895686055	Q2025-0080	2025-03-18	5335.62	▼	
<input type="checkbox"/>	Serrano-Cohen	V87638734	Q2025-0079	2025-03-12	15277.3	▼	

Quote:

Date:

Customer:

CIF:

Address:

City:

Province / State:

Zip:

Country:

Notes:   
sense mean single Improve close.

Quote:

Date:

Customer:

CIF:

Address:

City:

Province / State:

Zip:

Country:

Notes:   
sense mean single Improve close.

Description:

Quantity:

Price:

Discount:

Tax:

Total:

Taxes:

Base:

Total:

Subtotal:

Tax:

Total:

Payment method:

Valid until:

Status:

Choose Files:

New note:

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

SaltOS Dashboard Applications Modify - Quotes Admin

Customer		CIF	Quote	Date	Total
<input type="checkbox"/>	Cohen, Hill and Smith	P82569546	Q2025-0100	2025-03-05	713.36
<input type="checkbox"/>	Johnson, Floyd and Weeks	D87626925	Q2025-0699	2025-03-10	6048.39
<input type="checkbox"/>	Bruce, Lee and Munoz	C15192137	Q2025-0698	2025-03-11	794.72
<input type="checkbox"/>	Santos, Clark and Jacobson	W63402535	Q2025-0697	2025-04-17	1545.49
<input type="checkbox"/>	Patel Ltd	B37981168	Q2025-0696	2025-04-09	241.76
<input type="checkbox"/>	Hobbs-Harvey	R89729959	Q2025-0695	2025-03-16	23356.9
<input type="checkbox"/>	Patel-Stewart	V15470612	Q2025-0094	2025-02-23	3372.8
<input type="checkbox"/>	Alvarez, Valenzuela and Chambers	R84858103	Q2025-0693	2025-04-17	13212.8
<input type="checkbox"/>	Casey PLC	W21673781	Q2025-0692	2025-03-15	4714.34
<input type="checkbox"/>	Stewart, Scott and Wilson	N94728752	Q2025-0691	2025-02-22	2550.37
<input type="checkbox"/>	Dawson Group	E1232793	Q2025-0690	2025-03-20	23697.4
<input type="checkbox"/>	Hoffman Group	U92709751	Q2025-0689	2025-03-30	21215.8
<input type="checkbox"/>	Miller Ltd	H59899283	Q2025-0088	2025-04-12	27171.4
<input type="checkbox"/>	Booker-Douglas	J96464607	Q2025-0687	2025-04-01	19128.7
<input type="checkbox"/>	Wood, Donaldson and Hansen	B75663474	Q2025-0686	2025-04-28	8918.35
<input type="checkbox"/>	Booker, Rivas and Hines	Q43401155	Q2025-0685	2025-03-07	10145.4
<input type="checkbox"/>	Johnson, Stevenson and Lindsey	S45949218	Q2025-0684	2025-02-22	3666.7
<input type="checkbox"/>	Henderson-Bullock	G43558532	Q2025-0683	2025-03-22	5062.41
<input type="checkbox"/>	Hayden, Harmon and McDonald	A91244486	Q2025-0082	2025-03-22	321.41
<input type="checkbox"/>	Dunlap, Johnson and Rojas	E72564747	Q2025-0681	2025-03-22	26614.7
<input type="checkbox"/>	Perez, Rodriguez and Rollins	E895680655	Q2025-0680	2025-03-18	5335.62
<input type="checkbox"/>	Serrano-Cohen	V87638734	Q2025-0679	2025-03-12	15277.3

Quote: Q2025-6100 Date: 03/05/2025

Customer: Cohen, Hill and Smith CIF: P82569546

Address: 9385 Stevens Ports, Lake Christophermouth, MI 92292 City: Peterburgh Province / State: Nebraska

Zip: 33155 Country: Christmas Island

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: 04/19/2025 Status: Draft

New files: Choose Files No file chosen

New note:

✓ Save ✗ 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).

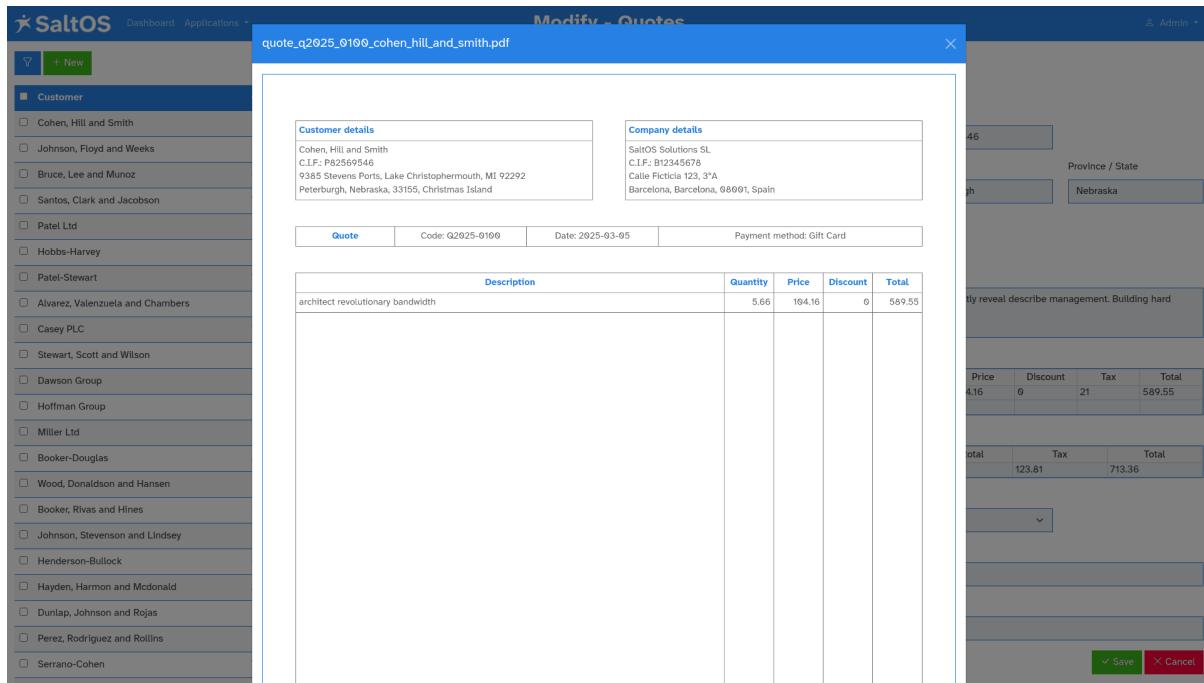
Quote lines are also included as a subtable, where each line contains product, quantity, price, tax, and discount.

## 8.4 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.

## 8.5 PDF generation



From the individual view of a record (view), the user can generate and download a PDF containing all relevant data of that entry.

From the list view (list), it is possible to select multiple records using the checkboxes and generate a single PDF that includes all of them.

## 9 Quotes Status

### 9.1 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".

## 9.2 List view

The screenshot shows the 'List - Quote Status' page within the SaltOS application. At the top, there is a navigation bar with the SaltOS logo, 'Dashboard', 'Applications', and an 'Admin' dropdown. Below the header is a search bar with 'Search', 'Search', and 'Reset' buttons. The main content area is a table with the following data:

Name	Description	Active
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	✓

Total: 10

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.

## 9.3 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.

**New - Quote Status**

This screenshot shows the 'New - Quote Status' page. On the left, there's a list of existing quote statuses with columns for Name, Description, and Active status. A search bar and filter buttons are at the top. On the right, there's a form to add a new status, with fields for Name and Description, and buttons for Create and Cancel.

Name	Description	Active
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	✓

Total: 10

+ Load more

Name:

Description:

✓ Create    × Cancel

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

**Detail - Quote Status**

This screenshot shows the 'Detail - Quote Status' page for the 'Closed' status. It displays the name and description, and includes edit and delete buttons.

Name	Description	Active
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	✓

Total: 10

+ Load more

Name: Closed

Description: Closed without result

Info

✗ Edit    ✗ Delete    × Close

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

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](#)

Active

Name:

Description:

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.

## 9.4 Delete

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

Deactivation is preferred to preserve consistency in historical records.

# 10 Invoices

## 10.1 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.

## 10.2 List view

Customer	CIF	Invoice	Date	Total	Closed	Paid
Walker, Foster and Medina	P80873247	P2025-0100	2025-04-01	16687.6	✗	✗
Hayes-Parks	V36652432	F2025-0099	2025-04-08	12886.5	✓	✓
Alexander-Durham	W56886873	P2025-0098	2025-04-20	5483.32	✗	✗
Mccoy-Rhodes	E43222337	F2025-0097	2025-04-19	9399.21	✓	✗
Thompson, James and Torres	W99456336	F2025-0096	2025-03-31	1662.88	✓	✗
Ramos Inc	J86415312	P2025-0095	2025-04-18	3492.23	✓	✗
Barrett LLC	F88972617	F2025-0094	2025-04-01	6859.89	✓	✗
Davidson, Moran and Prince	C8151177	P2025-0093	2025-04-12	615.18	✗	✗
Cooper-Ross	C92483881	F2025-0092	2025-04-17	2056.47	✓	✗
Fox PLC	H23319370	P2025-0091	2025-03-29	4261.76	✗	✗
Porter Ltd	F38625870	P2025-0090	2025-04-18	5696.69	✗	✗
Payne LLC	A18164586	F2025-0089	2025-04-17	1763.59	✓	✓
Norton and Sons	U68180334	F2025-0088	2025-04-15	12890.3	✓	✗
Sandoval, Thomas and Young	N64707069	F2025-0087	2025-03-27	7504.76	✓	✓
Foster, Kane and Carroll	G57664212	P2025-0086	2025-03-04	20366.2	✗	✗
Mitter-Fields	N82450561	P2025-0085	2025-03-27	13391.1	✗	✗
White, Smith and Buchanan	B56629426	F2025-0084	2025-03-23	5749.18	✓	✓
Poole-Miller	E72630228	F2025-0083	2025-03-24	17851.4	✓	✗
Gutierrez-Ortiz	C42283849	P2025-0082	2025-03-01	10986.4	✗	✗
Martinez and Sons	B84339204	F2025-0081	2025-03-17	38.1	✓	✗
Smith Inc	N62629325	F2025-0080	2025-04-07	21984.8	✓	✓
Moore, Evans and Owen	C66662486	P2025-0079	2025-03-31	15250	✗	✗

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.

## 10.3 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	New - Invoices						Admin			
		Search			Search	PDF	Reset	Closed			Paid		
Customer	CIF	Invoice	Date	Total	Closed	Paid		Proforma	Date	Invoice		Date	
Walker, Foster and Medina	P60873247	F2025-0169	2025-04-01	16687.6	✗	✗	▼		mm/dd/yyyy			mm/dd/yyyy	
Hayes-Parks	V36652432	F2025-0099	2025-04-08	12880.5	✓	✓	▼						
Alexander-Durham	W5688673	P2025-0098	2025-04-20	5483.32	✗	✗	▼						
Mccoy-Rhodes	E43222337	F2025-0097	2025-04-19	9399.21	✓	✗	▼						
Thompson, James and Torres	W99456336	F2025-0096	2025-03-31	1662.88	✓	✗	▼						
Ramos Inc	J86415312	F2025-0095	2025-04-18	3492.23	✓	✗	▼						
Barrett LLC	F88972617	F2025-0094	2025-04-01	6859.89	✓	✗	▼						
Davidson, Moran and Prince	C81511177	P2025-0093	2025-04-12	615.18	✗	✗	▼						
Cooper-Ross	C92483881	F2025-0092	2025-04-17	2856.47	✓	✗	▼						
Fox PLC	H23319370	P2025-0091	2025-03-29	4261.76	✗	✗	▼						
Porter Ltd	F38825870	P2025-0090	2025-04-18	5696.69	✗	✗	▼						
Payne LLC	A18164586	F2025-0089	2025-04-17	1763.59	✓	✓	▼						
Norton and Sons	U68180334	F2025-0088	2025-04-15	12690.3	✓	✗	▼						
Sandoval, Thomas and Young	N64707669	F2025-0087	2025-03-27	7564.76	✓	✓	▼						
Foster, Kane and Carroll	G57664212	P2025-0086	2025-03-04	29366.2	✗	✗	▼						
Miller-Fields	N82455651	P2025-0085	2025-03-27	13391.1	✗	✗	▼						
White, Smith and Buchanan	B56629426	F2025-0084	2025-03-23	5749.18	✓	✗	▼						
Poole-Miller	E72639228	F2025-0083	2025-03-24	17851.4	✓	✗	▼						
Gutierrez-Ortiz	C42283849	P2025-0082	2025-03-01	10986.4	✗	✗	▼						
Martinez and Sons	B84339204	F2025-0081	2025-03-17	38.1	✓	✗	▼						
Smith Inc	N62629325	F2025-0080	2025-04-07	21984.8	✓	✓	▼						
Moore, Evans and Owen	C66662446	P2025-0079	2025-03-31	15250	✗	✗	▼						
		Search			Search	PDF	Reset	Closed			Paid		
		Customer			Customer	Date			Invoice			Date	
		Address			Address	CIF			City			Province / State	
		Zip			Zip	Country							
		Notes			Notes								
		Concepts			Concepts								
		Description			Description	Quantity			Price			Discount	
												Tax	
												Total	
		Taxes			Taxes	Subtotal			Tax			Total	
		Payment method			Payment method	Due date			Paid			Paid date	
		Status			Status								
		New files			New files								

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

Detail - Invoices									
<span style="border: 1px solid #ccc; padding: 2px;">▼</span> <span style="border: 1px solid #ccc; padding: 2px; border-left: none;">+ New</span>		<input type="text" value="Search"/> <span style="border: 1px solid #ccc; padding: 2px;">Search</span>		<span style="border: 1px solid #ccc; padding: 2px;">PDF</span>	<span style="border: 1px solid #ccc; padding: 2px;">Reset</span>				
■ Customer	CIF	Invoice	Date	Total	Closed	Paid			
□ Walker, Foster and Medina	P80873247	F2025-0109	2025-04-01	16687.6	✗	✗	<span style="border: 1px solid #ccc; padding: 2px;">Closed</span>	<span style="border: 1px solid #ccc; padding: 2px;">Paid</span>	
□ Hayes-Parks	V36652432	F2025-0099	2025-04-08	12880.5	✓	✓	<span style="border: 1px solid #ccc; padding: 2px;">P2025-0109</span>	<span style="border: 1px solid #ccc; padding: 2px;">Date</span>	<span style="border: 1px solid #ccc; padding: 2px;">Invoice</span>
□ Alexander-Durham	W56886873	F2025-0098	2025-04-20	5483.32	✗	✗	<span style="border: 1px solid #ccc; padding: 2px;">04/01/2025</span>	<span style="border: 1px solid #ccc; padding: 2px;">Date</span>	<span style="border: 1px solid #ccc; padding: 2px;">mm/dd/yyyy</span>
□ Mccoy-Rhodes	E43222337	F2025-0097	2025-04-19	9399.21	✓	✗			
□ Thompson, James and Torres	W99456336	F2025-0096	2025-03-31	1662.88	✓	✗			
□ Ramos Inc	J86415312	F2025-0095	2025-04-18	3492.23	✓	✗			
□ Barrett LLC	F8972617	F2025-0094	2025-04-01	6859.89	✓	✗			
□ Davidson, Moran and Prince	C81511177	F2025-0093	2025-04-12	615.18	✗	✗			
□ Cooper-Ross	C92483881	F2025-0092	2025-04-17	2856.47	✓	✗			
□ Fox PLC	H23319370	P2025-0091	2025-03-29	4261.76	✗	✗			
□ Porter Ltd	F38025870	P2025-0090	2025-04-18	5696.69	✗	✗			
□ Payne LLC	A18164586	F2025-0089	2025-04-17	1763.59	✓	✓			
□ Norton and Sons	U68180334	F2025-0088	2025-04-15	12690.3	✓	✗			
□ Sandoval, Thomas and Young	N64797069	F2025-0087	2025-03-27	7564.76	✓	✓			
□ Foster, Kane and Carroll	G57664212	P2025-0086	2025-03-04	20366.2	✗	✗			
□ Miller-Fields	N82456561	P2025-0085	2025-03-27	13391.1	✗	✗			
□ White, Smith and Buchanan	B56629426	F2025-0084	2025-03-23	5749.18	✓	✓			
□ Poole-Miller	E72639228	F2025-0083	2025-03-24	17851.4	✓	✗			
□ Gutierrez-Ortiz	C42283849	P2025-0082	2025-03-01	10986.4	✗	✗			
□ Martinez and Sons	B84339204	F2025-0081	2025-03-17	38.1	✓	✗			
□ Smith Inc	N62629325	F2025-0080	2025-04-07	21984.8	✓	✓			
□ Moore, Evans and Owen	C66662446	P2025-0079	2025-03-31	15250	✗	✗			
Concepts									
					Description	Quantity	Price	Discount	Tax
strategize seamless web services					4.52	119.29	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	841.05
brand collaborative convergence					5.12	41.1	0	0	210.43
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	1464.45
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-mediaries					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	162.95	0	10	179.13
transform synergistic info-mediaries					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	710.64

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

SaltOS
Dashboard Applications ▾
Modify - Invoices
Admin ▾

+ New
Search
PDF ▾
Reset

Closed
 Paid

Customer	CIF	Invoice	Date	Total	Closed	Paid
Walker, Foster and Medina	P80873247	P2025-0100	2025-04-01	16687.6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hayes-Parks	V36652432	F2025-0099	2025-04-08	12886.5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alexander-Durham	W5686673	P2025-0098	2025-04-20	5483.32	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mccoy-Rhodes	E43222337	F2025-0097	2025-04-19	9399.21	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Thompson, James and Torres	W99456336	F2025-0096	2025-03-31	1662.88	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ramos Inc	J86415312	F2025-0095	2025-04-18	3492.23	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Barrett LLC	F88972617	F2025-0094	2025-04-01	6859.89	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Davidson, Moran and Prince	C81511177	P2025-0093	2025-04-12	615.18	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cooper-Ross	C92483881	F2025-0092	2025-04-17	2056.47	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fox PLC	H23319370	P2025-0091	2025-03-29	4261.76	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Porter Ltd	F38025879	P2025-0090	2025-04-18	5696.69	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payne LLC	A18164586	F2025-0089	2025-04-17	1763.59	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Norton and Sons	U68180334	F2025-0088	2025-04-15	12890.3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Sandoval, Thomas and Young	N64707069	F2025-0087	2025-03-27	7564.76	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Foster, Kane and Carroll	G57664212	P2025-0086	2025-03-04	20366.2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Miller-Fields	N82450561	P2025-0085	2025-03-27	13391.1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
White, Smith and Buchanan	B56629426	F2025-0084	2025-03-23	5749.18	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Poole-Miller	E72630228	F2025-0083	2025-03-24	17851.4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gutierrez-Ortiz	C42283849	P2025-0082	2025-03-01	10986.4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Martinez and Sons	B84339204	F2025-0081	2025-03-17	38.1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Smith Inc	N62629325	F2025-0080	2025-04-07	21984.8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Moore, Evans and Owen	C66662486	P2025-0079	2025-03-31	15250	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Proforma
Date
Invoice
Date

P2025-0100
04/01/2025

mm/dd/yyyy

Customer
CIF

Walker, Foster and Medina
P80873247

Address
City
Province / State

3772 Thomas Shores, New Lukehaven, UT 16683
Wendyshire
New Mexico

Zip
Country

83217
Switzerland

Notes  
Factor whom arrive special check respond summer. Red apply tend condition maintain.

Concepts

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
841.85

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-mediaries
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-mediaries
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.

## 10.4 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.

## 10.5 PDF generation

Description	Quantity	Price	Discount	Total
strategize seamless web services	4.52	110.29	0	498.51
redefine granular web-readiness	7.31	114.12	0	834.22
engage impactful supply-chains	7.77	129.27	10	841.05
brand collaborative convergence	5.12	41.1	0	210.43
engineer Impactful interfaces	3.62	37.52	0	135.82
optimize front-end technologies	7.62	11.74	5	84.99
scale dynamic schemas	7.1	197.81	0	1484.45
strategize mission-critical channels	7.12	41.96	0	298.76
harness scalable content	9.77	44.13	0	431.15
target granular networks	6.34	194.25	0	1231.55
enable visionary Info-mediaries	3.21	32.57	0	104.55
envisioneer B2B e-tailers	7.19	191.37	0	1375.95
architect 24/365 experiences	7.98	198.32	0	1582.59
implement bricks-and-clicks networks	8	174.33	0	1394.64
transform B2B architectures	6.69	94.57	0	632.67
brand frictionless markets	1.74	162.95	0	179.13
transform synergistic Info-mediaries	1.21	118.87	0	143.83
reinvent scalable initiatives	7.24	27.97	0	202.5
deliver cross-platform applications	5.36	132.47	0	710.64
brand B2C functionalities	1.89	22.66	15	35.44

From the individual view of a record (view), the user can generate and download a PDF containing all relevant data of that entry.

From the list view (list), it is possible to select multiple records using the checkboxes and generate a single PDF that includes all of them.

## 10.6 Widgets on the dashboard

The invoicing application ('invoices') publishes several widgets on the main dashboard to provide a real-time overview of the system's billing status.

The available widgets are:

- **Table 'last\_7\_invoices'**: shows the 7 most recent invoices, including key information such as customer, total amount, and payment status.
- **Chart 'invoice\_total\_by\_day'**: displays the total amount invoiced per day, highlighting peaks and activity trends.

- **Chart 'invoice\_avg\_by\_day'**: shows the average daily invoice amount, useful for evaluating consistency or seasonality.
- **Chart 'top5\_customers\_by\_total'**: highlights the top 5 customers by billing volume, helping identify key accounts.
- **Chart 'invoice\_paid\_vs\_pending'**: compares the number of paid vs. pending invoices, giving insight into payment flow.
- **Chart 'invoice\_avg\_days\_to\_pay'**: shows the average number of days customers take to pay their invoices, helping assess payment behavior.

These widgets offer useful visual insights for decision-making and allow continuous monitoring of the business's financial evolution.

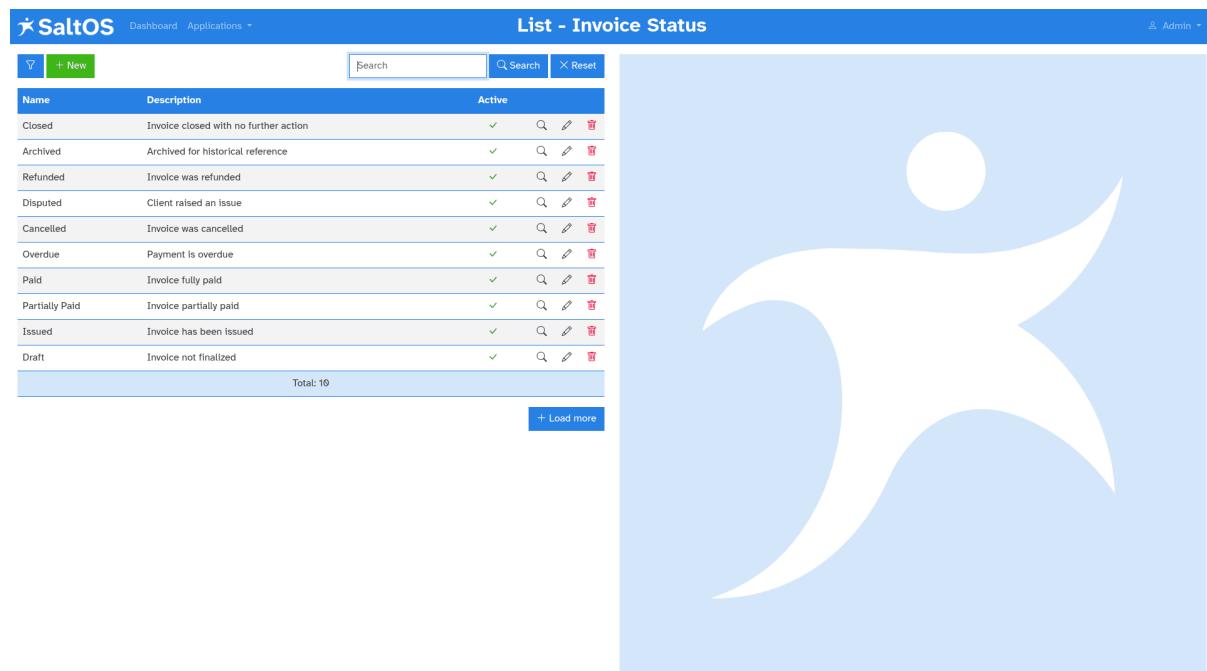
## 11 Invoices Status

### 11.1 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".

### 11.2 List view



The screenshot shows a web-based application interface for managing invoice statuses. The title bar reads "SaltOS Dashboard Applications > List - Invoice Status". On the left, there is a sidebar with a "New" button and a search bar. The main area displays a table with the following data:

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 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.

### 11.3 Form view

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

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

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

Name:

Description:

Active

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

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

Name:

Description:

Active

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

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](#)

Active

Name: Closed  
Description: Invoice closed with no further action

Save  Cancel

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.

## 11.4 Delete

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

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

# 12 Payment Methods

## 12.1 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.

## 12.2 List view

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.	✓	✗

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.

## 12.3 Form view

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

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

**New - Payment methods**

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:

Description:

New files:  Choose Files No file chosen

New note:

[✓ Create](#) [✗ Cancel](#)

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

**Detail - Payment methods**

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:

Description:

[Info](#) [Edit](#) [Delete](#) [Close](#)

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

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:

Save  Cancel

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.

## 12.4 Delete

Payment methods can be deleted if not used in invoices.

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

# 13 Products

## 13.1 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.

## 13.2 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.

## 13.3 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.

**New - Products**

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 
No file chosen

New note

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

**Detail - Products**

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.

SaltOS Dashboard Applications > Modify - Products

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
Compatible bifurcated website	PRD-0100	License
Price	Cost	Margin
390.82	289.65	34.93
Exempt / Not subject		
Description		
Season billion street.		
Category	Measure unit	Brand
Software	h	Raymond and Sons
Barcode	Stock	Min stock
1650495302350	465.91	Max stock
Location	Image Url	
Almacén Kra - Estantería It	https://cdn.example.com/products/0100.jpg	
New files		
Choose Files	No file chosen	
New note		

✓ Save ✗ Cancel

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.

## 13.4 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.

# 14 Product Categories

## 14.1 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".

## 14.2 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	✓   
Total: 10		

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.

## 14.3 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 'New - Product Categories' page in SaltOS. At the top right, there's an 'Admin' dropdown. On the left, there's a sidebar with a 'New' button. The main area has a search bar and a 'Create' section with fields for 'Name' and 'Description'. A table lists various product categories like 'Other', 'Consumables', etc., with an 'Active' column. At the bottom right are 'Create' and 'Cancel' buttons.

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	✓

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

The screenshot shows the 'Detail - Product Categories' page in SaltOS. It's similar to the creation screen but lacks the 'Create' and 'Cancel' buttons. The 'Info' button is highlighted. The 'Name' and 'Description' fields are populated with 'Other' and 'Unclassified category' respectively. The bottom right has 'Edit', 'Delete', and 'Close' buttons.

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	✓

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

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"/>

Total: 10 [+ Load more](#)

Active

Name:

Description:

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.

## 14.4 Delete

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

When in use, they should be disabled instead.

# 15 Product Types

## 15.1 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".

## 15.2 List view

The screenshot shows a list of product types in a SaltOS application. The table has three columns: Name, Description, and Active. The Active column contains a green checkmark icon. The table includes rows for Other, Consulting, Training, Maintenance, Digital, Kit, Subscription, License, Service, and Good. A search bar and a 'Load more' button are at the top of the table. The total number of records is 10. The background features a large, stylized blue graphic of a flame or wave.

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	✓

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.

## 15.3 Form view

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

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

**New - Product Types**

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](#)

Active

Name:

Description:

Create Cancel

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

**Detail - Product Types**

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](#)

Active

Name: Other

Description: Miscellaneous

Info Edit Delete Close

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

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

Total: 10 [+ Load more](#)

Active

Name: Other  
Description: Miscellaneous

Save  Cancel

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.

## 15.4 Delete

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

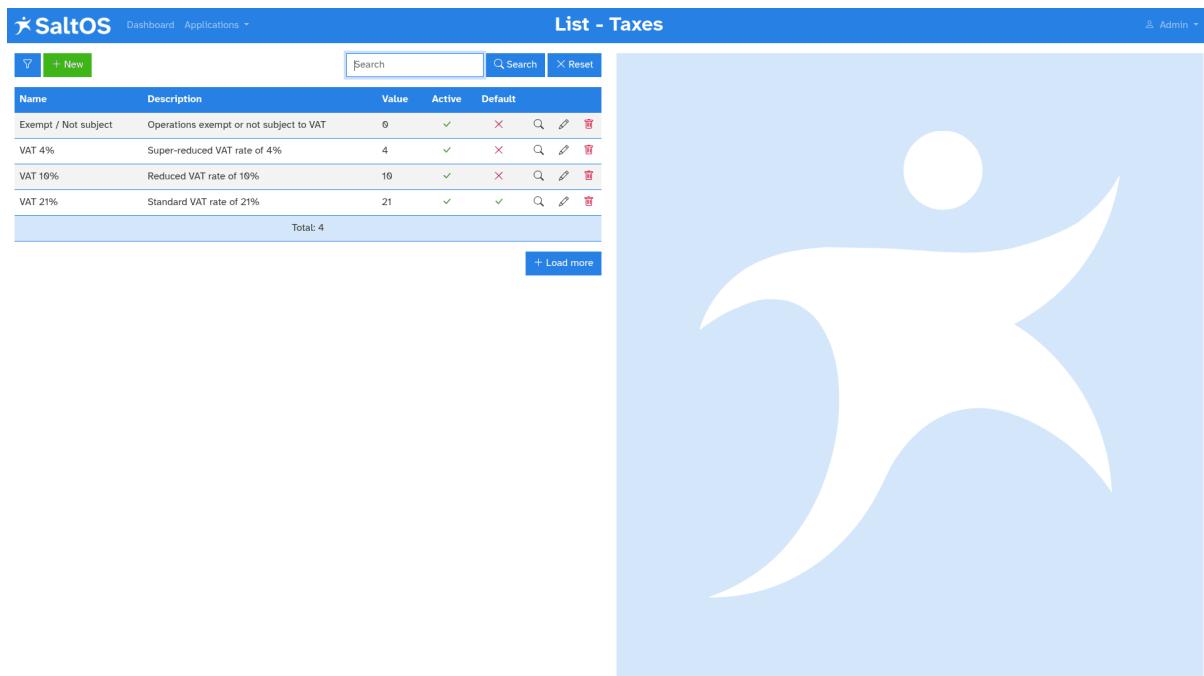
Otherwise, deactivation is the recommended action.

# 16 Taxes

## 16.1 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.

## 16.2 List view



The screenshot shows the 'List - Taxes' page from the SaltOS application. At the top, there is a header bar with the SaltOS logo, a navigation menu with 'Dashboard' and 'Applications', and a user account icon labeled 'Admin'. Below the header is a search bar with fields for 'Search', 'Q Search', and 'X Reset'. A table titled 'List - Taxes' displays four rows of tax entries:

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	✓	✓

A total count of 'Total: 4' is shown below the table. At the bottom right of the table area is a blue button labeled '+ Load more'.

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.

## 16.3 Form view

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

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

**New - Taxes**

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	✓	✓

Total: 4

+ Load more

Active Default

Name:

Description:

New files: Choose Files No file chosen

New note:

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

**Detail - Taxes**

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	✓	✓

Total: 4

+ Load more

Active Default

Name: VAT 21%

Value: 21

Description: Standard VAT rate of 21%

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

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	✓	✓

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.

## 16.4 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.

# 17 Workorders

## 17.1 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.

## 17.2 List view

SaltOS Dashboard Applications List - Workorders Admin

+ New Search PDF Reset

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.

## 17.3 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.

**New - Workorders**

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

Date:   
 Worker:   
 Client:

Description:  
 Week course bad despite whether factor night. Box off method information.

Hours: 
Price: 
Total: 
Invoice:

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

**Detail - Workorders**

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

Date:   
 Worker:   
 Client:

Description:  
 Week course bad despite whether factor night. Box off method information.

Hours: 
Price: 
Total: 
Invoice:

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

SaltOS Dashboard Applications > Modify - Workorders

Date: 10/10/2024 Worker: Matthew Reeves Client: Meyer Ltd

Description: Week course bad despite whether factor night. Box off method information.

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	Erlin McDonald	Nolan-Anderson

Hours: 4.58 Price: 76.53 Total: 350.51 Invoice: F2025-0989

New files: Choose Files No file chosen

New note:

Save  Cancel

The form includes the following fields:

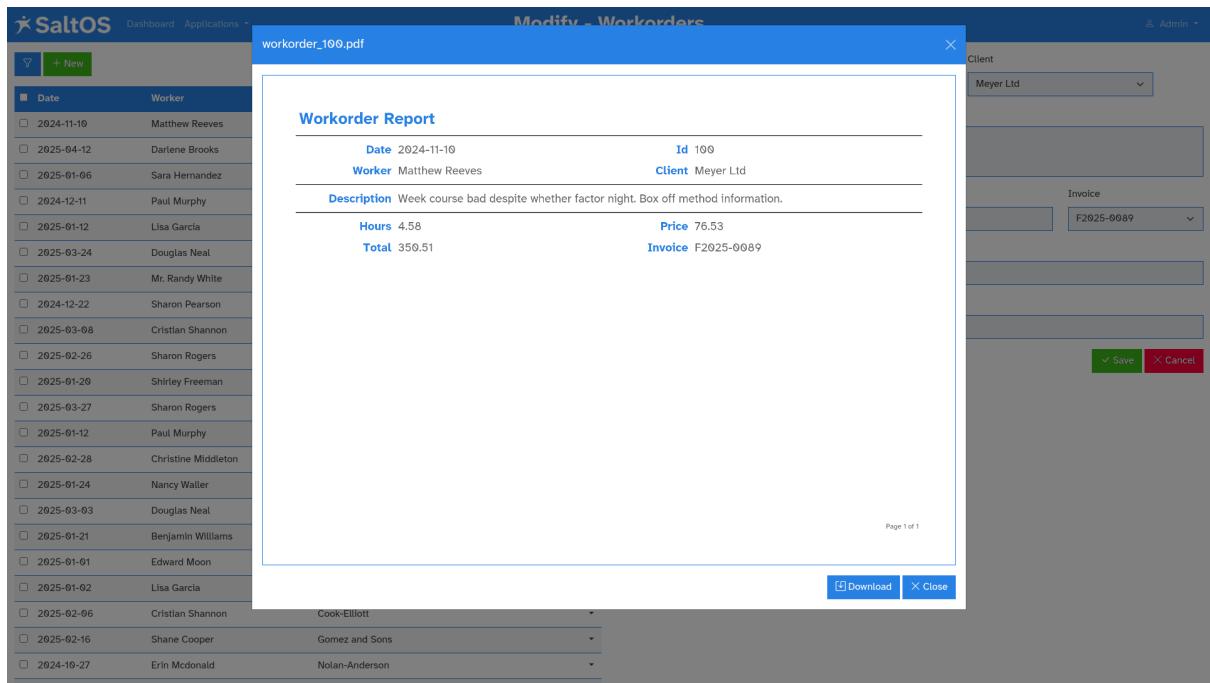
- Date: The date when the work order was created or scheduled.
- Worker: The employee or technician assigned to carry out the task.
- Client: The customer who requested the service or task.
- Description: Details about the nature or objective of the work to be done.
- Hours: Estimated or actual number 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.

## 17.4 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.

## 17.5 PDF generation



From the individual view of a record (view), the user can generate and download a PDF containing all relevant data of that entry.

From the list view (list), it is possible to select multiple records using the checkboxes and generate a single PDF that includes all of them.

## 18 Purchase

### 18.1 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.

## 18.2 List view



SaltOS Dashboard Applications ▾

List - Purchase

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.

## 18.3 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.

**New - Purchase**

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-Brownning	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:  Supplier:

Description:

Subtotal:  Tax:  Total:  Status:

Invoice Code:  Invoice Date:  Paid:  Paid date:

Notes:

New files:  No file chosen

New note:

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

**Detail - Purchase**

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-Brownning	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:  Supplier:

Description:

Subtotal:  Tax:  Total:  Status:

Invoice Code:  Invoice Date:  Paid:  Paid date:

Notes:

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

SaltOS Dashboard Applications > Modify - Purchase

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

Description: Husband size fly.

Order date	Supplier	Invoice	Paid
2025-04-03	Yates-Thompson	PO-0100	✓ ▾
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	✗ ▾

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.

New files: Choose Files No file chosen

New note:

✓ Save ✖ Cancel

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.

## 18.4 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.

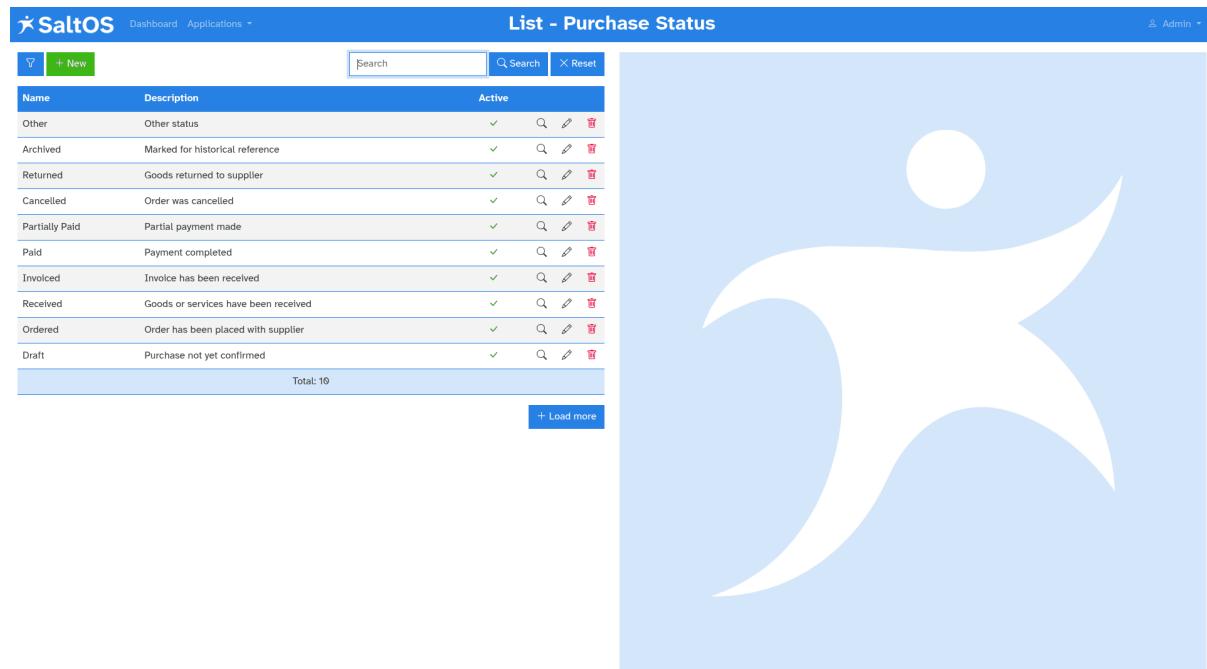
## 19 Purchase Status

## 19.1 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.

## 19.2 List view



The screenshot shows the 'List - Purchase Status' page in the SaltOS application. The page has a header with the SaltOS logo, a search bar, and an 'Admin' dropdown. Below the header is a table with columns: Name, Description, and Active. The table lists ten purchase status entries:

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.

## 19.3 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.

**New - Purchase Status**

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:

Create Cancel

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

**Detail - Purchase Status**

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: Other

Description: Other status

Info Edit Delete Close

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

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

Total: 10 [+ Load more](#)

Active

Name: Other

Description: Other status

Save  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.

## 19.4 Delete

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

In most cases, deactivation is preferred.

# 20 Suppliers

## 20.1 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.

## 20.2 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	D49236977	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.

## 20.3 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.

**New - Suppliers**

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	Briantont	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
 CIF

Name
Address
City
Province / State

Zip
Country

Email
Phone
Website

Notes

Type

Choose Files
No file chosen

New note

Create
 Cancel

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

**Detail - Suppliers**

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	Briantont	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
 CIF

Name
Address
City
Province / State

Zip
Country

Email
Phone
Website

Notes

Type

Info
 Edit
 Delete
 Close

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

SaltOS Dashboard Applications > Modify - Suppliers

Active

Name	CIF	City	Country	Active
Salazar Group	H75361502	Brendahaven	Malta	<input type="checkbox"/>
Simmons-Moreno	H62237466	Port Michael	United States of America	<input type="checkbox"/>
Ramos and Sons	B98389231	Lake Kelly	Oman	<input type="checkbox"/>
Hood-Browning	P15524973	Skinnerton	Moldova	<input type="checkbox"/>
Reeves LLC	D86417534	Brownburgh	Uruguay	<input type="checkbox"/>
Rosales, Hamilton and Campbell	P39659227	New Jeffrey	Western Sahara	<input checked="" type="checkbox"/>
Evans, Osborne and Olsen	E27469869	Amberhaven	Uganda	<input 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 type="checkbox"/>
Freeman, Lee and Hubbard	S78579340	Brianton	Argentina	<input type="checkbox"/>
Wilcox Group	V660337362	Lake Anne	France	<input type="checkbox"/>
Johnson-Jones	D45446951	Port Gail	Sweden	<input type="checkbox"/>
Marquez LLC	S78341283	Jenniferville	Burkina Faso	<input 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 type="checkbox"/>
Harris, Chapman and Soto	U36042863	Lake Victorlamouth	Cayman Islands	<input type="checkbox"/>
Norman, May and Harrison	P12465958	Lake Adriennestad	Bahrain	<input checked="" type="checkbox"/>
Russell, Young and Boone	F85493033	Lake Keith	Saudi Arabia	<input type="checkbox"/>

Name: Salazar Group
CIF: H75361502

Address: 65916 Laura Rue
City: Brendahaven
Province / State: Pennsylvania

Zip: 59573
Country: Malta

Email: jacoblevins@ross-chen.org
Phone: 412.602.6750x928
Website: https://matthews.com

Notes: Right-sized didactic throughput

Type: Manufacturer
 No file chosen

New note:

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.

## 20.4 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.

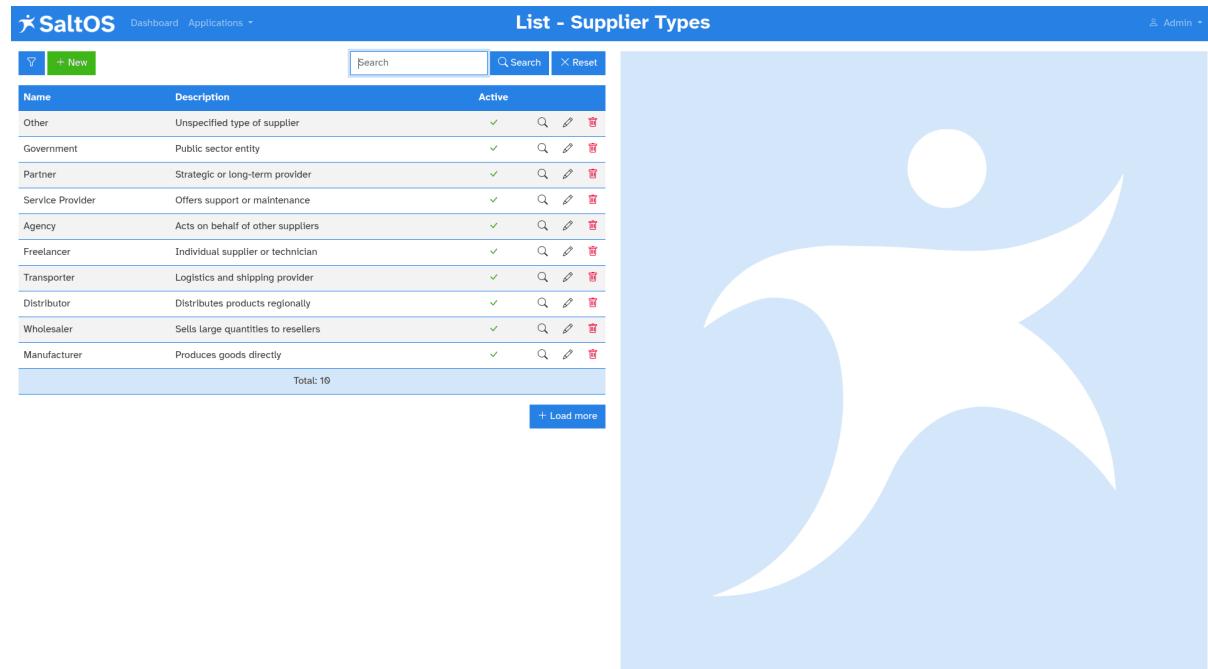
## 21 Supplier Types

### 21.1 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.

### 21.2 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.

### 21.3 Form view

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

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

**New - Supplier Types**

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

Total: 10 [+ Load more](#)

Active

Name:

Description:

Create Cancel

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

**Detail - Supplier Types**

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

Total: 10 [+ Load more](#)

Active

Name: Other

Description: Unspecified type of supplier

Info Edit Delete Close

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

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

Total: 10 [+ Load more](#)

Active

Name:

Description:

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.

## 21.4 Delete

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

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

# 22 Departments

## 22.1 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".

## 22.2 List view

SaltOS Dashboard Applications ▾

### List - Departments

Admin ▾

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.

## 22.3 Form view

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

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

**New - Departments**

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"/>

Active
Name 
Code 
Parent

Notes 
New files  No file chosen

New note

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

**Detail - Departments**

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"/>

Active
Name 
Code 
Parent

Notes

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

SaltOS Dashboard Applications ▾

### Modify - Departments

Admin ▾

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"/>

Active

Name: Dietitian | Code: DPT-0100 | Parent: Engineer, building services

Notes:  
Must gun business young too indicate bit.

New files:  
 No file chosen

New note:

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.

## 22.4 Delete

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

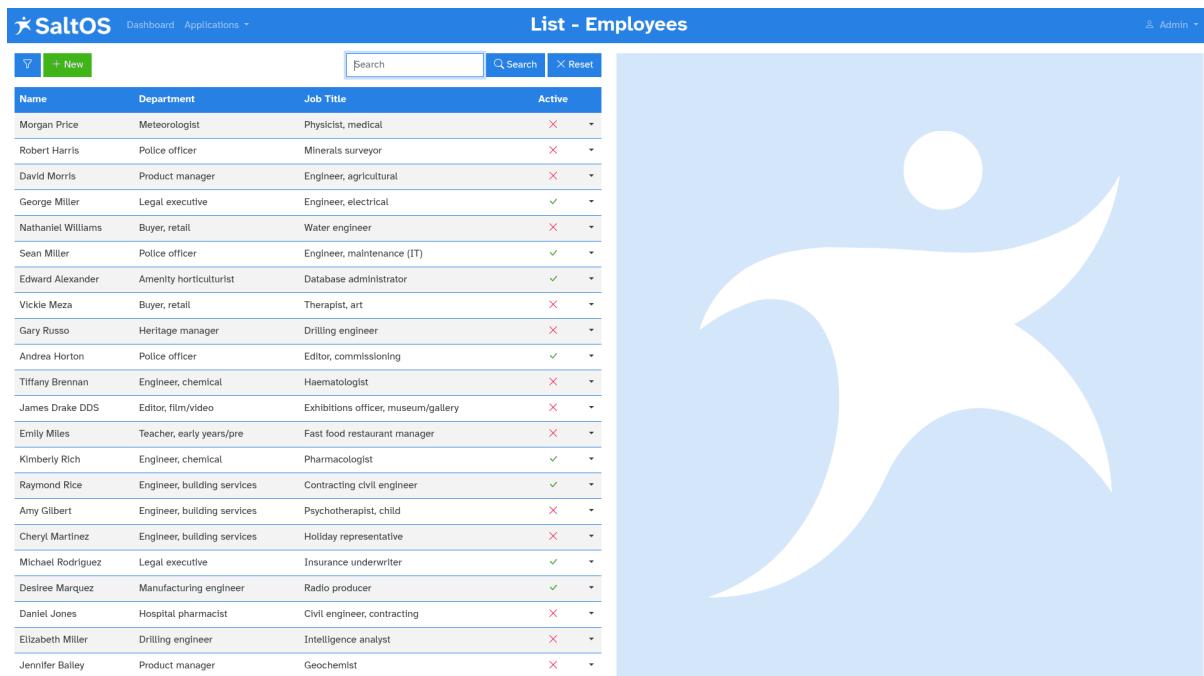
If in use, deactivation is recommended instead.

# 23 Employees

## 23.1 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.

## 23.2 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.

## 23.3 Form view

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

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

**New - Employees**

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
 Inactive

Name

NIF

Department

Job Title

Start time

End time

mm/dd/yyyy
mm/dd/yyyy

Address

City

Province / State



Zip

Country



Email

Phone



Notes

Type

User

No file chosen

New note



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

**Detail - Employees**

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
 Inactive

Name

NIF

Morgan Price

87085964Y

Department

Job Title

Start time

End time

Meteorologist

Physicist, medical

04/30/2022

mm/dd/yyyy

Address

City

Province / State

8984 Schultz Motorway Apt. 045

Kempfurt

Ohio

Zip

Country

98242

North Macedonia

Email

Phone

nicolas57@example.com

935.678.1850x078

Notes

News leg style and military decide.

Type

User




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

SaltOS Dashboard Applications ▾

### Modify - Employees

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:

New files:  No file chosen

New note:

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.

## 23.4 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.

## 24 Employee Types

### 24.1 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.

### 24.2 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	✓

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.

### 24.3 Form view

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

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

**New - Employee Types**

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

Total: 10 [+ Load more](#)

Active

Name:

Description:

[✓ Create](#) [✗ Cancel](#)

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

**Detail - Employee Types**

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

Total: 10 [+ Load more](#)

Active

Name: Other

Description: Other type of employee

[Info](#) [Edit](#) [Delete](#) [Close](#)

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

The screenshot shows the 'Modify - Employee Types' page in the SaltOS application. On the left, there is a list of existing employee types with columns for Name, Description, and Active status. A search bar and a 'Load more' button are also present. On the right, a new entry form is displayed with fields for Name (containing 'Other'), Description (containing 'Other type of employee'), and Active status (checked). Save and Cancel buttons are at the bottom.

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

Total: 10 [+ Load more](#)

Active

Name  
Other

Description  
Other type of employee

Save  Cancel

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.

## 24.4 Delete

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

Otherwise, it is recommended to disable them.

# 25 Certificates

## 25.1 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.

## 25.2 List view

The screenshot shows the 'List - Certificates' page in SaltOS. At the top, there is 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. A table lists 'Certificate nicknames available' with columns for the nickname and actions. The table includes entries like 'Juan Pérez - Tech Solutions S.A.', 'María López - López Consultores Ltda.', and 'Carlos Gómez - Innovatech Inc.'. Each entry has a search icon and a delete icon. The background of the page features a large, abstract graphic of a person's head and shoulders in blue and white.

Certificate nicknames available:	
Juan Pérez - Tech Solutions S.A.	
María 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.

## 25.3 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.

**New - Certificates**

Admin

Certificate nicknames available:

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

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.

**Detail - Certificates**

Admin

Certificate nicknames available:

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

Name

Juan Pérez - Tech Solutions S.A.

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:25:50:4C: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.

## 25.4 Delete

Certificates can be deleted if no longer relevant.

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

# 26 Company

## 26.1 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.

## 26.2 List view

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

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.

### 26.3 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.

The screenshot shows the 'New - Company Info' form in SaltOS. At the top left is the SaltOS logo and navigation links for Dashboard and Applications. On the right is an Admin dropdown. The main area has a title 'New - Company Info'. Below it is a search bar with 'Search', 'Search' button, and 'Reset' button. A 'New' button is on the left. To the right is a 'Active' checkbox. The form contains several input fields and dropdowns for company details like Name, CIF, City, Country, Address, Zip, Phone, Email, Website, IBAN, SWIFT/BIC, Fiscal Regime, Activity Code, and notes. There are also sections for 'Additional Notes', 'New files' (with a 'Choose Files' button and message 'No file chosen'), and 'New note'. At the bottom are 'Create' and 'Cancel' buttons.

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

**Detail - Company Info**

Name	CIF	City	Country	Active
SaltOS Solutions SL	B12345678	Barcelona	Spain	<input checked="" type="checkbox"/>
Total: 1				
<a href="#">+ Load more</a>				

Name: SaltOS Solutions SL

Address: Calle Ficticia 123, 3<sup>rd</sup> floor

Zip: 08001

Phone: +34 933 123 456

IBAN: ES76 1234 5678 9101 2345 6789

Additional Notes: Entidad acogida al régimen general del IVA

Code: B12345678

City: Barcelona

Province / State: Barcelona

Country: Spain

Email: info@saltos.org

Website: https://www.saltos.org

SWIFT/BIC: BESMESMMXXX

Fiscal Regime: RE - Régimen General

Activity Code: 8299

[Info](#)  [Edit](#)  [Delete](#)  [Close](#)

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

**Modify - Company Info**

Name	CIF	City	Country	Active
SaltOS Solutions SL	B12345678	Barcelona	Spain	<input checked="" type="checkbox"/>
Total: 1				
<a href="#">+ Load more</a>				

Name: SaltOS Solutions SL

Address: Calle Ficticia 123, 3<sup>rd</sup> floor

Zip: 08001

Phone: +34 933 123 456

IBAN: ES76 1234 5678 9101 2345 6789

Additional Notes: Entidad acogida al régimen general del IVA

Code: B12345678

City: Barcelona

Province / State: Barcelona

Country: Spain

Email: info@saltos.org

Website: https://www.saltos.org

SWIFT/BIC: BESMESMMXXX

Fiscal Regime: RE - Régimen General

Activity Code: 8299

New files:

New note:

Save
 Cancel

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.

## 26.4 Delete

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

Only deactivation is allowed in most configurations.

# 27 Emails

## 27.1 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.

## 27.2 List view

Sender	Date	Subject	Status
alice@example.com	02/01/24	Catching Up	Read
manager@business.com	02/01/24	Business Update	New
bob@example.com	02/01/24	Catching Up	New
jane.doe@business.com	02/01/24	Business Update	New
bob@example.com	02/01/24	Catching Up	New
jane.doe@business.com	02/01/24	Business Update	Read
alice@example.com	02/01/24	Catching Up	Read
manager@business.com	02/01/24	Business Update	Read
alice@example.com	02/01/24	Catching Up	Read
manager@business.com	02/01/24	Business Update	Read
alice@example.com	02/01/24	Catching Up	Read
manager@business.com	02/01/24	Business Update	Read

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.

## 27.3 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.

## 27.4 Reply / Compose

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

The screenshot shows the SaltOS interface for composing a new email. On the left, there is a list of received emails from various senders like alice@example.com, manager@business.com, and bob@example.com. Each email entry includes the recipient, date (e.g., 02/01/24), status (e.g., Read, New), subject, and a preview of the message content. On the right, the 'New email' form is displayed. It includes fields for 'From' (set to Admin user <admin@example.com>), 'To', 'CC', and 'BCC'. There are also sections for 'Priority' (set to Normal) and 'Sensitivity' (set to Normal). The 'Subject' field is empty. Below these, the 'Message' area contains a rich-text editor toolbar and a preview of the message body: "Email sent from my SaltOS". At the bottom, there is a 'Attachments' section with a 'Choose Files' button and a note that no file has been chosen. Finally, there are 'Send' and 'Cancel' buttons at the bottom right.

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.

## 27.5 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.

## 27.6 PDF generation

The screenshot shows the SaltOS desktop environment. On the left is a sidebar with a list of recent emails from various accounts. The main area is titled 'Detail of the email' and shows an email message with the subject 'email\_100\_catching\_up.pdf'. The message is from 'alice@example.com' to 'diana@example.com' at '2024-01-02 01:40:00' with the subject 'Catching Up'. The content of the email discusses catching up after a trip to the mountains. To the right of the email detail is a PDF viewer window showing the same content as the email, with the title 'email\_100\_catching\_up.pdf'. The PDF viewer has standard controls like zoom and orientation.

From the individual view of a record (view), the user can generate and download a PDF containing all relevant data of that entry.

From the list view (list), it is possible to select multiple records using the checkboxes and generate a single PDF that includes all of them.

## 27.7 Widget on the dashboard

The email application ('emails') publishes a widget on the main dashboard that displays a compact list with the 5 most recently received emails.

This widget allows users to quickly review their most recent messages without entering the full application, improving visibility of recent activity and enabling direct access to each email.

## 28 Emails Accounts

### 28.1 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.

## 28.2 List view

User	Name	Email	Enabled
Admin (admin)	Admin user	admin@example.com	✓

Total: 1

+ See more emails

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.

## 28.3 Form view

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

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

**SaltOS** Dashboard Applications Admin

### New email account

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

Total: 1 [+ See more emails](#)

**Main configuration**

User: Admin (admin) Name: Email:

Signature:

**Incoming server configuration**

Host:  Port:  Extra:   
 User:  Password:

Delete:  Days:

**Outgoing server configuration**

Host:  Port:  Extra:   
 User:  Password:

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

**SaltOS** Dashboard Applications Admin

### Detail of the email account

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

Total: 1 [+ New email](#)

**Main configuration**

User: Admin (admin) Name: Admin user Email: admin@example.com

Signature:   
Email sent from my SaltOS

**Incoming server configuration**

Host: example.com Port: 995 Extra: TLS  
 User: admin Password:

Delete:  Days: 90

**Outgoing server configuration**

Host: example.com Port: 587 Extra: TLS  
 User:  Password:

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

The screenshot shows the 'Modify this email account' page in the SaltOS application. The main interface is a form with three main sections:

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

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.

## 28.4 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.

# 29 Groups

## 29.1 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.

## 29.2 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.

## 29.3 Form view

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

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

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

Total: 1 [+ More groups](#)

Active

Code:  Name:

Description:

Users: Admin (admin) [»](#) [«](#)

Applications and permissions:

	main	menu	create	widget	action	config	help
login	Allow						
dashboard	Allow					Allow	Allow
tester	Allow	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	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
filelog	Allow	Allow	Allow	Allow	Allow	Allow	Allow
customers	Allow	Allow	Allow	Allow	Allow	Allow	Allow

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

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

Total: 1 [+ More groups](#)

Active

Code:  Name:

Description:

Users: Admin (admin) [»](#) [«](#)

Applications and permissions:

	main	menu	create	widget	action	config	help
login	Allow						
dashboard	Allow					Allow	Allow
tester	Allow	Allow	Allow	Allow	Allow	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	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
filelog	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 'Modify this group' page in the SaltOS application. On the left, there's a sidebar with a list of groups. The main area has several tabs: 'Active' (selected), 'Code', 'Name', 'Description', 'Users', and 'Applications and permissions'. The 'Active' tab shows a single group named 'admin' with the description 'Admin group'. The 'Code' tab shows 'admin' in the 'Code' field. The 'Name' tab shows 'Admin' in the 'Name' field. The 'Description' tab shows 'Admin group' in the 'Description' field. The 'Users' tab shows 'Admin (admin)' assigned to this group. The 'Applications and permissions' tab is a grid where each row represents an application and each column represents a permission (main, menu, create, widget, action, config, help). Most permissions are set to 'Allow'.

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.

## 29.4 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.

# 30 Users

## 30.1 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.

## 30.2 List view

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.

## 30.3 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.

**New user**

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

Total: 1

+ More users

Active

Username: admin Group: Admin (admin)

Name: Admin New password:  Retype new password:

Description:

Start time:  End time:

Days:  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

Groups:  Admin (admin)

Applications and permissions:

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

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

**Detail of the user**

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

Total: 1

+ More users

Active

Username: admin Group: Admin (admin)

Name: Admin New password:  Retype new password:

Description: Admin user

Start time: 12:00:00 AM End time: 11:59:59 PM

Days:  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

Groups:  Admin (admin)

Applications and permissions:

	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						
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 'Modify this user' interface. At the top, there's a search bar and a 'More users' button. The main area has sections for 'Active' status (checkbox), 'Username' (admin), 'Group' (Admin (admin)), 'Name' (Admin), 'New password', 'Retype new password', and 'Description' (Admin user). Below these are 'Start time' (12:00:00 AM) and 'End time' (11:59:59 PM) fields. The 'Days' section lists Monday through Sunday with navigation arrows. The 'Groups' section shows Admin (admin) with similar navigation arrows. A large table at the bottom details 'Applications and permissions' with columns for main, menu, create, widget, action, config, and help, listing various system components like login, dashboard, tester, etc., with 'Allow' or 'Deny' options. A 'Passwords history' section is also present.

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.

## 30.4 Delete

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

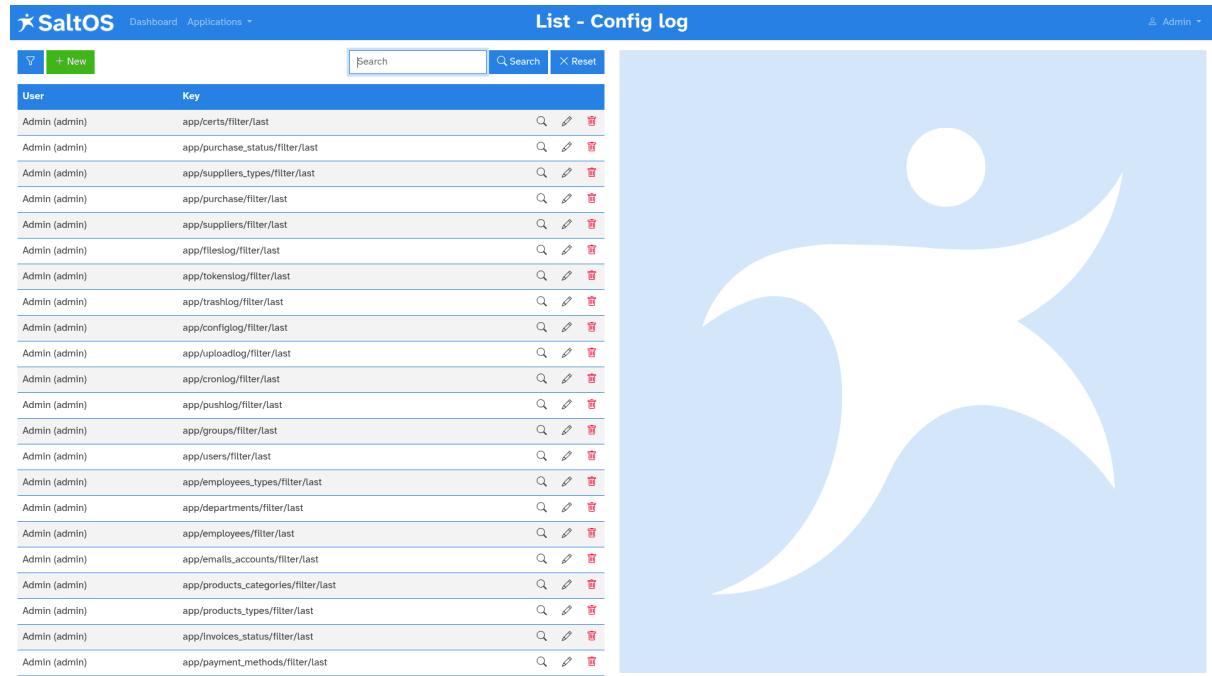
Otherwise, it is recommended to disable them instead of deletion for audit purposes.

## 31 Config Log

## 31.1 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.

## 31.2 List view



The screenshot shows the 'List - Config log' page of the SaltOS4 application. At the top, there is a header bar with the SaltOS logo, a 'Dashboard' link, an 'Applications' dropdown, and an 'Admin' user icon. Below the header is a search bar with a placeholder 'Search' and a 'Reset' button. To the left of the search bar is a 'New' button. The main area contains a table with two columns: 'User' and 'Key'. The 'User' column lists 'Admin (admin)' repeated 20 times. The 'Key' column lists various configuration paths such as 'app/certs/filter/last', 'app/purchase\_status/filter/last', etc. Each row in the table has three icons: a magnifying glass for search, a pencil for edit, and a trash can for delete. The background of the page features a large, stylized blue and white graphic of a person's head and shoulders.

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/products_categories/filter/last
Admin (admin)	app/products_types/filter/last
Admin (admin)	app/invoices_status/filter/last
Admin (admin)	app/payment_methods/filter/last

The following fields are displayed in the list view:

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

## 31.3 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.

**New - Config log**

User	Key	Actions
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/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/products_categories/filter/last	
Admin (admin)	app/products_types/filter/last	
Admin (admin)	app/invoices_status/filter/last	
Admin (admin)	app/payment_methods/filter/last	

User:  Key:

Value:  
1 {  
2    "page": "0",  
3    "search": "",  
4    "search\_extra": ""  
5 }

Create Cancel

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

**Detail - Config log**

User	Key	Actions
Admin (admin)	app/leads_status/filter/last	
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/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/products_categories/filter/last	
Admin (admin)	app/products_types/filter/last	
Admin (admin)	app/invoices_status/filter/last	
Admin (admin)	app/payment_methods/filter/last	

User: Admin (admin) Key: app/leads\_status/filter/last

Value:  
1 {  
2    "page": "0",  
3    "search": "",  
4    "search\_extra": ""  
5 }

Edit Delete Close

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/products_categories/filter/last
Admin (admin)	app/products_types/filter/last
Admin (admin)	app/invoices_status/filter/last
Admin (admin)	app/payment_methods/filter/last

User: Admin (admin)  
Key: app/leads\_status/filter/last

```

1 {
2   "page": "0",
3   "search": "",
4   "search_extra": ""
5 }

```

Save Cancel

It includes:

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

## 31.4 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.

# 32 Cron Log

## 32.1 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.

## 32.2 List view

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.

## 32.3 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.

## 32.4 Delete

Cron log entries are not meant to be deleted regularly.

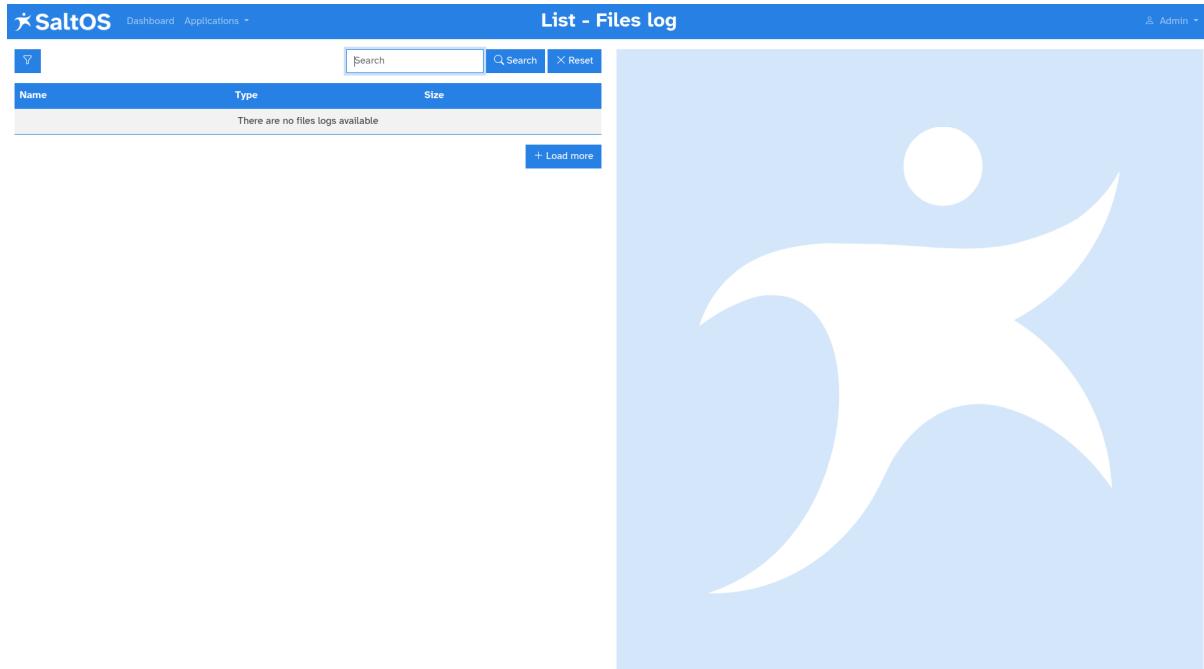
Automatic cleanup or manual purge may be configured to remove older entries.

## 33 Files Log

### 33.1 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.

### 33.2 List view



The screenshot shows the 'List - Files log' page of the SaltOS4 application. At the top, there is a header bar with the SaltOS logo, a 'Dashboard' link, an 'Applications' dropdown, and an 'Admin' dropdown. Below the header is a search bar with a 'Search' button and a 'Reset' button. The main area has a table with three columns: 'Name', 'Type', and 'Size'. A message at the bottom of the table says 'There are no files logs available'. At the bottom right of the table area 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.

### 33.3 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.

## 33.4 Delete

File log entries are usually not deleted manually.

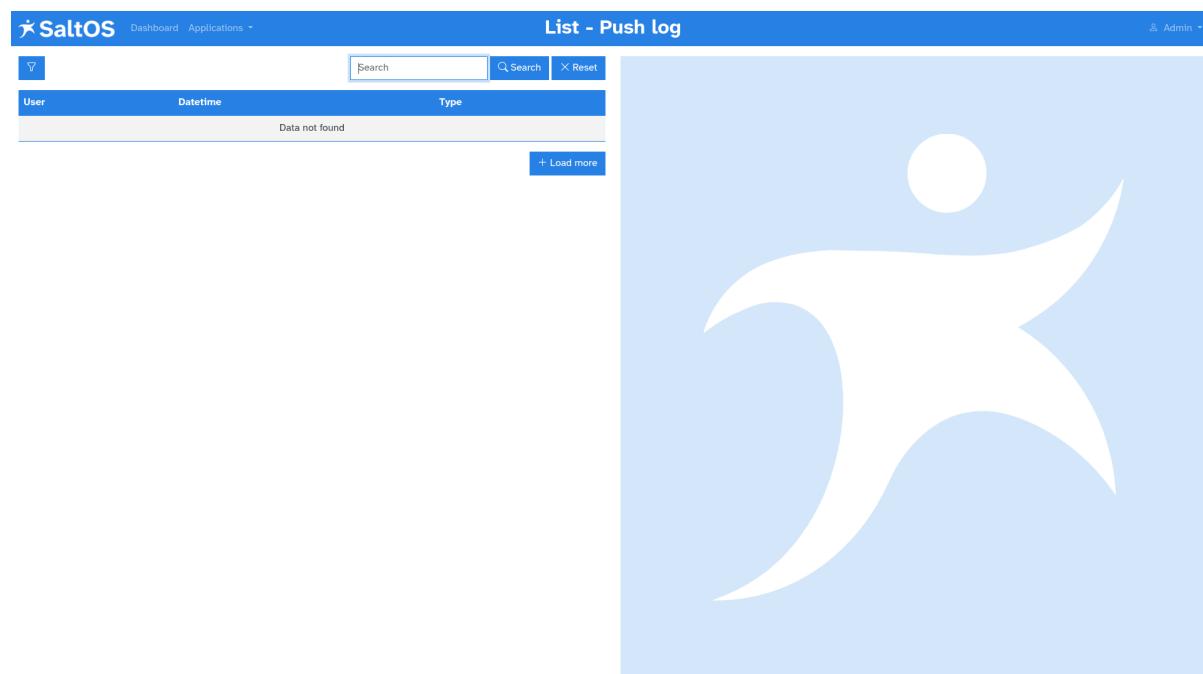
They are retained for accountability and security monitoring, and may be purged automatically based on system settings.

# 34 Push Log

## 34.1 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.

## 34.2 List view



The screenshot shows the 'List - Push log' page of the SaltOS application. At the top, there is a header bar with the SaltOS logo, a 'Dashboard' link, and an 'Applications' dropdown. On the right of the header is an 'Admin' user icon. Below the header is a search bar with a placeholder 'Search', a magnifying glass icon, and a 'Reset' button. To the left of the search bar is a blue downward arrow icon. The main content area has a title 'List - Push log'. Below the title is a table header with three columns: 'User', 'Datetime', and 'Type'. A message 'Data not found' is displayed below the table. At the bottom of the table area is a blue 'Load more' button. The background of the page features a large, stylized white graphic of a person's head and shoulders on a light blue background.

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).

## 34.3 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.

## 34.4 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.

# 35 Tokens Log

## 35.1 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.

## 35.2 List view



SaltOS Dashboard Applications Admin

### List - Tokens log

User	Created	Token	Active
Admin (admin)	2025-04-27 09:22:01	d8267a40-5c6f-6581-0c0d-f331a3b14865	✓
Admin (admin)	2025-04-27 09:21:56	871767f5-e748-9039-139d-3b4b24631ed3	✗
Admin (admin)	2025-04-27 09:21:51	434e78be-9886-29a9-0bf5-e94e33391a5a	✗
Admin (admin)	2025-04-27 09:21:42	5254964e-9e9c-5cc4-31cc-7d67b0e9262f	✗
Admin (admin)	2025-04-27 09:21:35	4c959268-46e2-2037-7ca4-966eabec4759	✗
Admin (admin)	2025-04-27 09:20:48	6457d173-12c8-4b30-a7c4-1a08f5ae224b	✗
Admin (admin)	2025-04-27 09:15:53	a3b25e53-3ccc-0d92-8f5b-efca7424dc25	✗
Admin (admin)	2025-04-27 09:11:41	6a500721-8915-7f28-5241-ef64cd7cbfc5	✗
Admin (admin)	2025-04-27 08:59:29	2b9c9a65-d7c2-f2cb-d491-5a5237a48e6f	✗
Admin (admin)	2025-04-27 08:47:53	e729fc4a-202e-9131-234c-c53c192d9ede	✗
Admin (admin)	2025-04-27 08:43:03	631907f1-566b-5b7e-73eb-1648c8e9f1855	✗
Admin (admin)	2025-04-27 08:42:54	3e79ccb-692e-6912-ee82-89fa0aa9e96b5	✗
Admin (admin)	2025-04-27 08:42:50	31886187-b223-6328-c757-273704889e47	✗
Admin (admin)	2025-04-27 08:42:42	d46228a9-4ec7-b34b-f0c-518826797886f	✗
Admin (admin)	2025-04-27 08:42:01	b65de05b-0d07-b610-cc8a-e9518e8e5160f	✗
Admin (admin)	2025-04-27 08:41:55	1ffacf9-1767-b70b-8454-b97a6ddec80	✗
Admin (admin)	2025-04-27 08:33:01	d2b1ecea-a5af-7493-a804-97d5033fad41	✗
Admin (admin)	2025-04-27 08:32:40	5ecb3cd2-3ee0-9fbf-7164-73c76d796ab5	✗
Admin (admin)	2025-04-27 08:32:09	78677ab8-eb15-6c71-0912-424a6b6a398b	✗

Total: 19 + Load more

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.

### 35.3 View entry

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

The screenshot shows the 'Detail - Tokens log' page in the SaltOS interface. At the top, there's a search bar and filter options for 'Active', 'User', 'Created', 'Updated', 'Remote Address', 'User Agent', 'Token', and 'Expires'. Below this is a table listing tokens with columns for User, Created, Token, and Active status. A single row is selected, showing detailed information: User (Admin (admin)), Created (04/27/2025, 08:32:09 AM), Token (78677ab0-eb15-6c7f-09f2-424a6b6a396b), and Expires (04/28/2025, 08:32:09 AM). The bottom right of the table has a 'X Close' button.

User	Created	Token	Active
Admin (admin)	2025-04-27 09:22:01	e8267a40-5c6f-6581-0c0d-f331a3b14865	<input checked="" type="checkbox"/>
Admin (admin)	2025-04-27 09:21:56	b71767f5-e748-9039-139d-3b4b24631ed3	
Admin (admin)	2025-04-27 09:21:51	434e78be-9886-29a9-0fb5+94e3339185a	
Admin (admin)	2025-04-27 09:21:42	5254964e-9e9c-5c4-31cc-f6d7b0e9262f	
Admin (admin)	2025-04-27 09:21:35	4c959268-46e2-2037-7ca4-966abec4759	
Admin (admin)	2025-04-27 09:20:48	6457d173-12c8-4b30-a7c4-1a0815ae224b	
Admin (admin)	2025-04-27 09:15:53	a3b25e53-3ccc-0d92-8fb5-efca7424dc25	
Admin (admin)	2025-04-27 09:11:41	6a569721-8915-7128-5241-ef64cd7cbfc5	
Admin (admin)	2025-04-27 08:59:29	2b9c9a65-d7c2-12cb-d491-5a5237a48e6f	
Admin (admin)	2025-04-27 08:47:53	e729fc4a-202e-9131-234c-c53c192c9ede	
Admin (admin)	2025-04-27 08:43:03	631907f1-566b-5b7e-73eb-1648cae9f855	
Admin (admin)	2025-04-27 08:42:54	3e7c9ccb-962e-9612-ee82-89b0aa9e96b5	
Admin (admin)	2025-04-27 08:42:50	31886f87-b223-6328-c757-273704889e47	
Admin (admin)	2025-04-27 08:42:42	d46228a9-4ec7-b34b-10e5-18a26797886f	
Admin (admin)	2025-04-27 08:42:01	b65de05b-0d07-b5f0-cc8a-e9518e5160f	
Admin (admin)	2025-04-27 08:41:55	1ffaca9-1767-b76b-8454-b97a6ddecc80	
Admin (admin)	2025-04-27 08:33:01	d2b1eca-a5af-7493-a864-97d5033fad41	
Admin (admin)	2025-04-27 08:32:40	5ecb3cd2-3ee0-9fbf-7164-73c76d796ab5	
Admin (admin)	2025-04-27 08:32:09	78677ab0-eb15-6c7f-09f2-424a6b6a396b	

Total: 19

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.

### 35.4 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.

## 36 Trash Log

### 36.1 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.

### 36.2 List view

The screenshot shows the 'List - Trash log' page of the SaltOS application. At the top, there is a navigation bar with the SaltOS logo, 'Dashboard', 'Applications', and an 'Admin' dropdown. Below the header is a search bar with fields for 'Search', 'Q Search', and 'Reset'. The main area contains a table with three columns: 'User', 'Datetime', and 'Name'. A message 'Data not found' is centered below the table. At the bottom right of the table area is a blue button labeled '+ Load more'.

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.

### 36.3 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.

## 36.4 Delete

Trash log entries cannot be deleted directly from the interface.

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

# 37 Upload Log

## 37.1 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.

## 37.2 List view

The screenshot shows the 'List - Upload log' page of the SaltOS interface. At the top, there's a navigation bar with the SaltOS logo, 'Dashboard', 'Applications', and 'Admin' options. Below the navigation is a search bar with fields for 'Search', 'Search', and 'Reset'. The main area has a table with four columns: 'User', 'Datetime', 'App', and 'Name'. A message 'Data not found' is displayed below the table. On the right side, there's a large, light blue placeholder 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.

## 37.3 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.

## **37.4 Delete**

Upload log entries are normally preserved for historical traceability.

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