OpenPro ERP Software

Demo Fundamentals Guide

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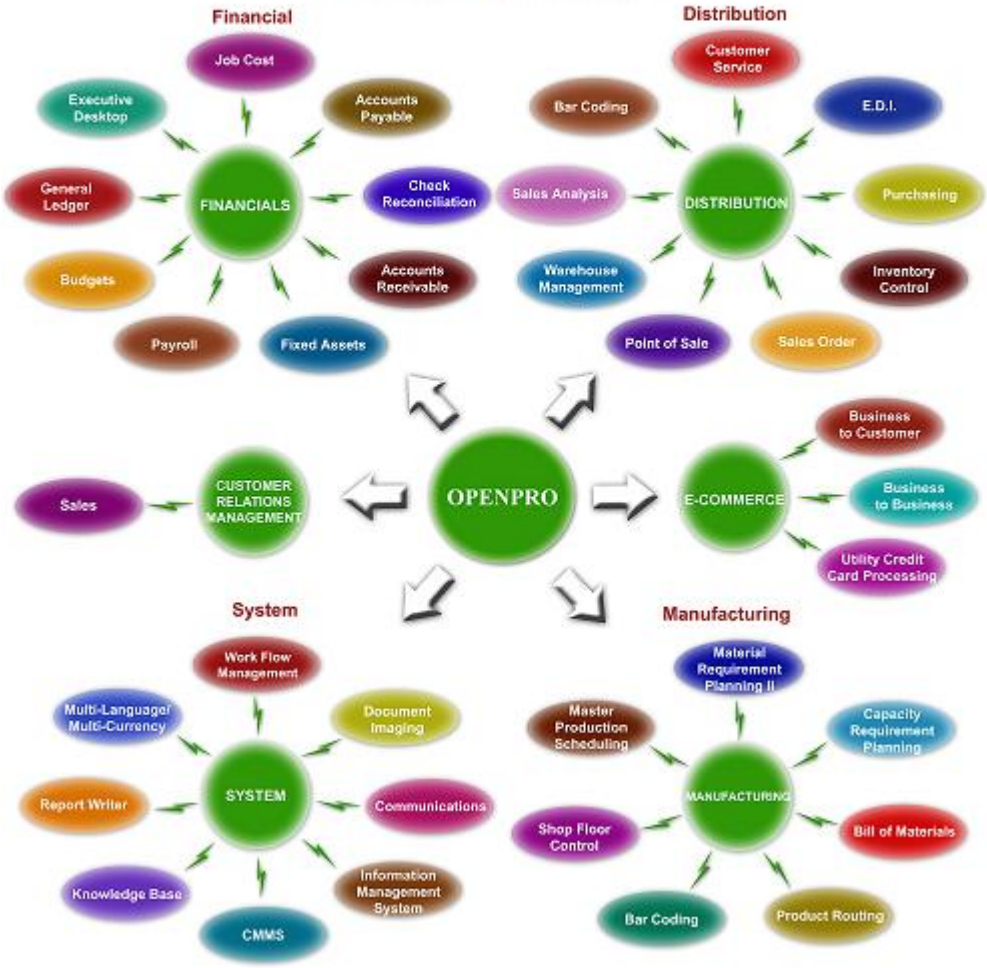
OpenPro training demo fundamentals guide updated 04/2010

OpenPro ERP

The Open Source ERP Software Solution

More Value. More Features.



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Introduction

Thank you for your interest in OpenPro. This Demonstration Guide is designed to orient you through OpenPro. The guide contains startup information as well as a more detailed overview of the basic business flow. We hope you'll find the scenarios in the overview to be useful. We've loaded the same set of data used to populate the overview screen shots into the database you'll be accessing during your evaluation period.

After your evaluation, we would like to know what your thoughts are and how we can help you to make the proper choices about how OpenPro can help your business. Please don't hesitate to contact us at salesop@openpro.com or call 714-378-4600. And again, thank you for your interest. We truly value you opinions and suggestions.

On-line training processes

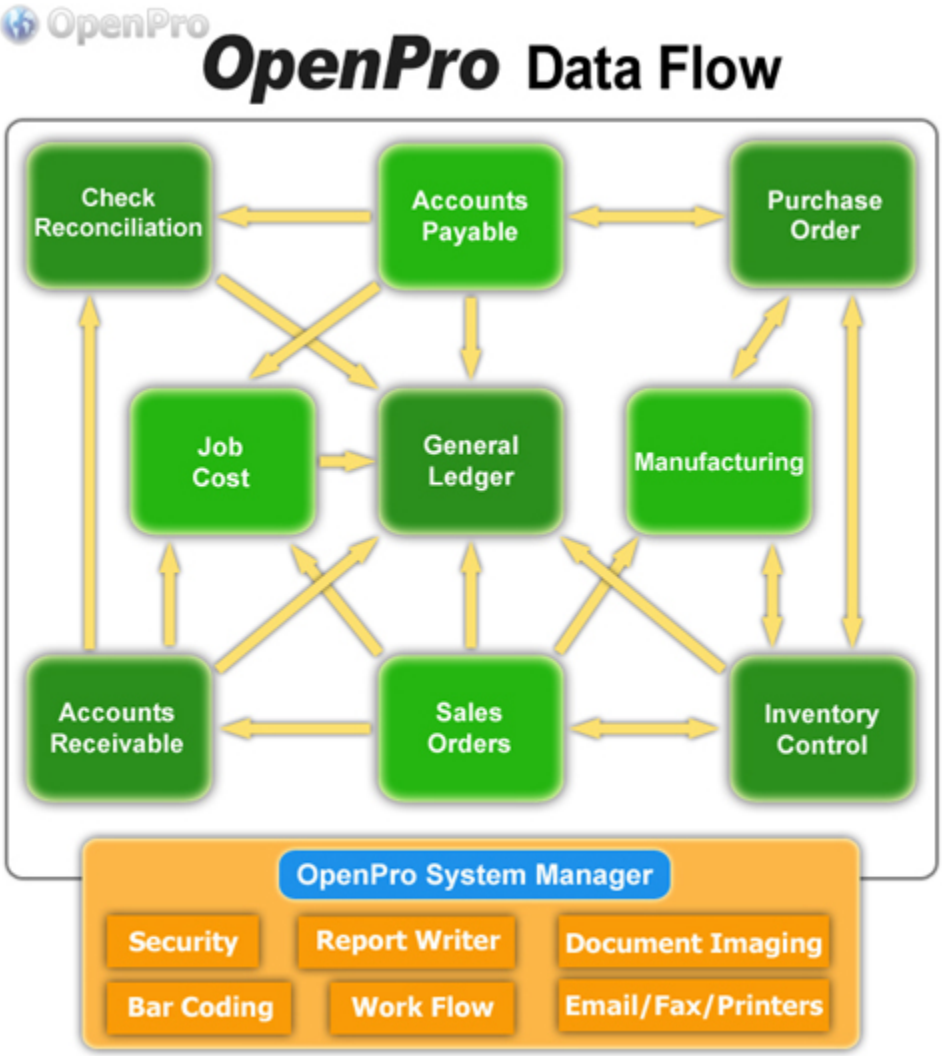
On the www.openpro.com website you can find our on-line training, that walks you thru the processes in this manual.

Or go to www.openpro.com/ol_training.html

This has general information on the OpenPro ERP packages. But also has video training sessions by application.

Basic Process Flow

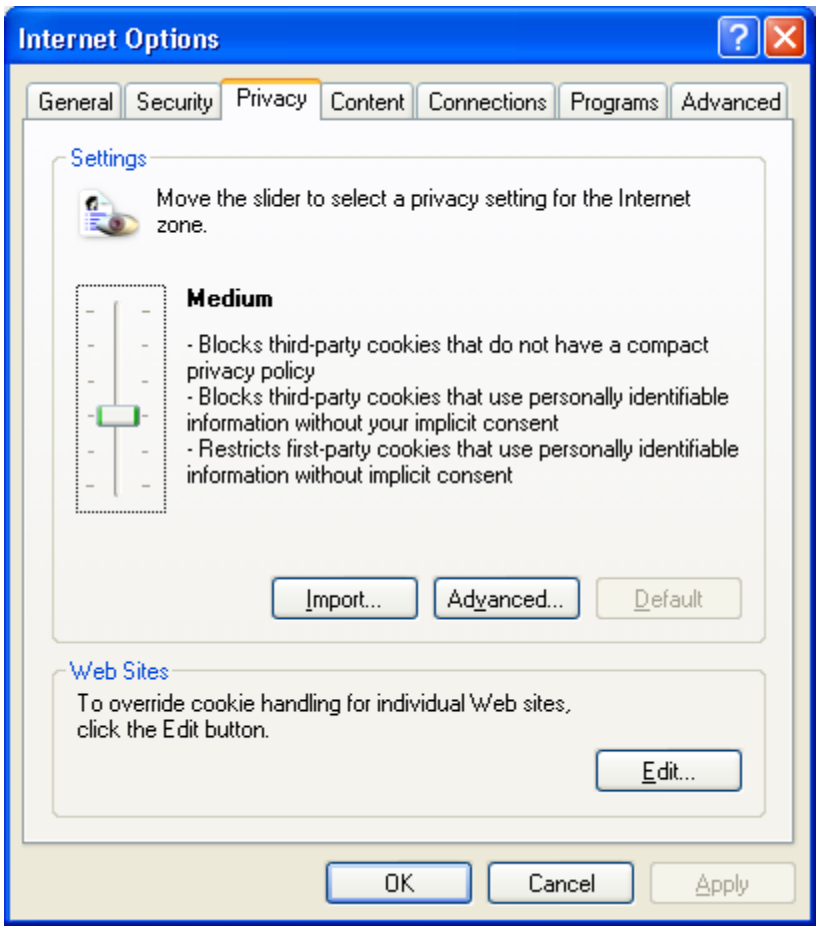
- This section shows you the overall OpenPro system data flow and integration between systems.



Log In to OpenPro ERP software

- This section details the steps required to login to your evaluation copy of the OpenPro ERP software. This demo system works on any client from Windows 98, 2000, CE and XP, or Apple systems with browser or Linux operating systems.

The **configuration of your browser** must match the following options.
To configure your browser go **to TOOLS > OPTIONS**
Security and Privacy needs to be set **to MEDIUM**, and to allow cookies.

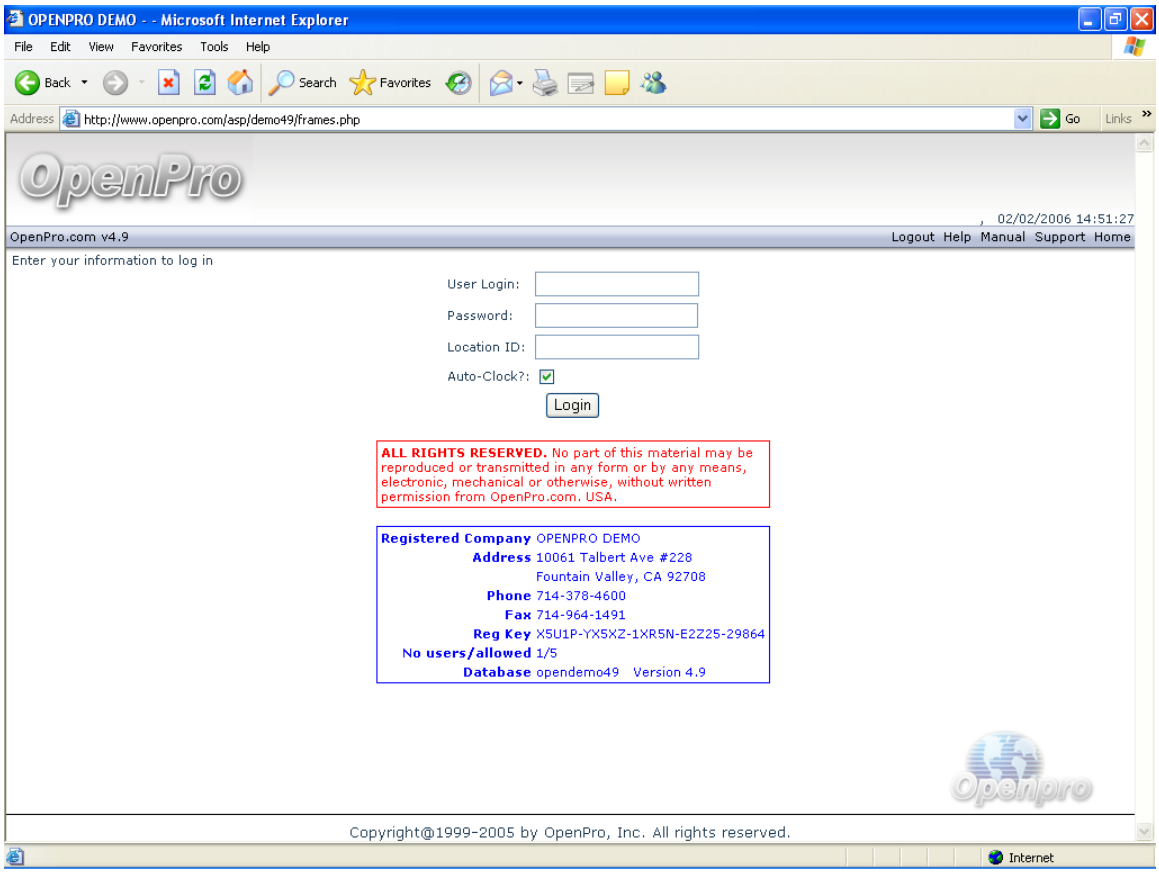


If it is not set to Medium you will receive some errors logging into the system.

Figure 1.1: Login Screen for OpenPro Client for Windows

Note

This is a fully functional OpenPro Client. It is hard-coded to access a demonstration database on our company server. Due to heavy usage we must limit the number of concurrent connections to the software. If you don't connect the first time you try, please try again later.



When logging into the OpenPro Standard Solution, you are presented with the following options:

User Login: Enter the Username we assigned you when you requested your evaluation copy.

- This will be the same Username as the Username you use to log into the OpenPro website.

Password: Enter the password we assigned you when you requested your evaluation copy.

- This will be the same Username as the Username you use to log into the OpenPro website The password you type into this field will not display on your screen, but will be represented by asterisks (*) for security purposes.

Company ID: Enter the upper case **DEMO**.

On the top menu bar, to the far right of the screen, the following buttons are available:

LOGOUT: brings you back to this login screen.

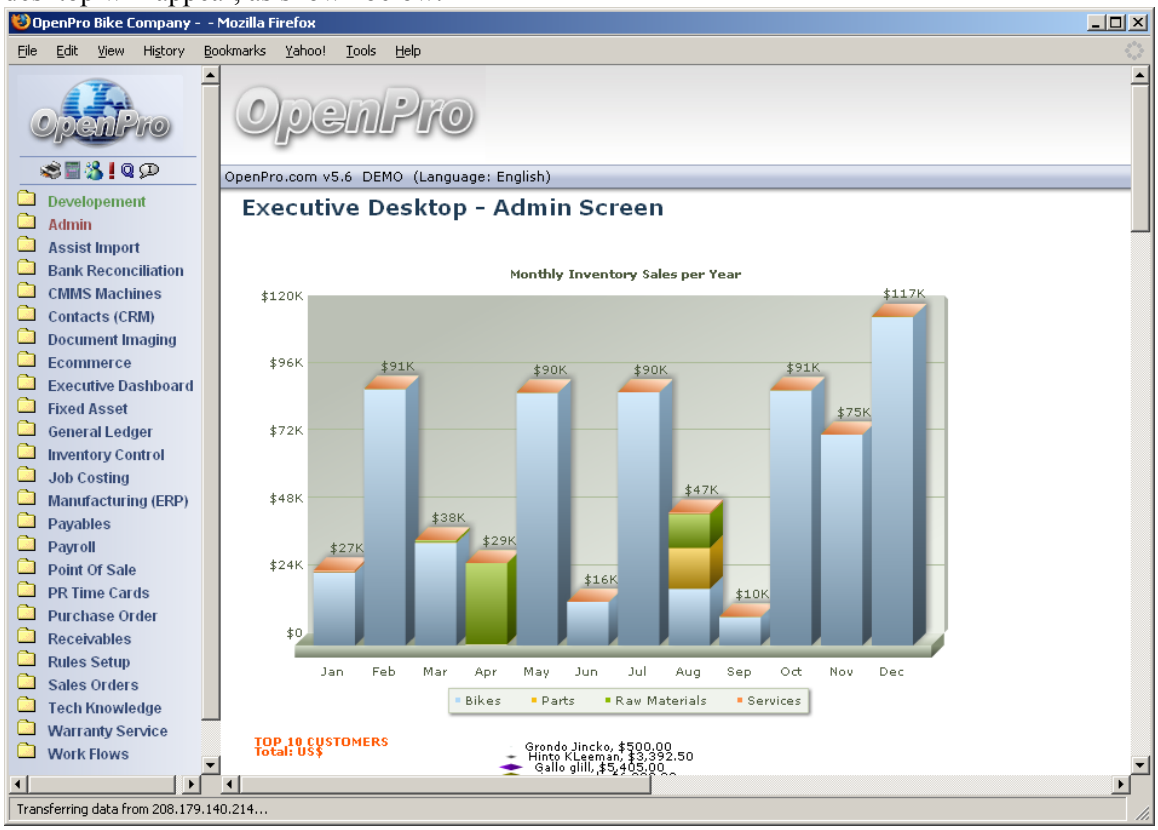
HELP: Click to see detail help information about the screen you are working on.

MANUAL: Detailed manuals about each application, including policy and procedures.

SUPPORT: Online support during normal business hours, or can be emailed at supportop@openpro.com .

HOME: Takes you back to the main menu screen.

Once your Username and password have been successfully authenticated, the main application desktop will appear, as shown below.



When you first login to the system executive desktop gives you a summary of how your business is doing. Here we have one of the over 600 different data and graphics to display on the screen.

Figure 1.2: Main Application Desktop for the Windows Client

If you do not reach the application desktop, verify that you have entered your Username and password correctly. Also keep in mind that we have limited the number of concurrent sessions. Our server may be busy when you try to log in initially. Try again later and see if this corrects the problem. If you are still experiencing difficulty, visit the Frequently Asked Questions (FAQ) section of our website. Or contact Customer Service at opinfo@openpro.com.

On the top **menu bar**, to the far left of the screen, the following buttons are available:

Printer Icon: Prints information on the right hand screen to your printer. This is used to print reports, screens, as well you can right click your mouse and choose the print option.

Calculator: An on-line 10 key calculator.

Messenger Services: This option can be used to send instant messages to anyone who is logged into the system.

The menu bar also shows you what Version of the software you are running, who you are logged in as, and your IP address that you are logged in from. This information is also stored in the database for historical and security purposes.

To right of the top **menu bar** are the following.

Logout: brings you back to this login screen.

Help: Click to see detail help information about the screen you are working on.

Manual: Detailed manuals about each application, including policy and procedures.

Support: Online support during normal business hours, or can be emailed at supportop@openpro.com .

Home: Takes you back to the main menu screen.

On the **application menu** section at the bottom of the menu:

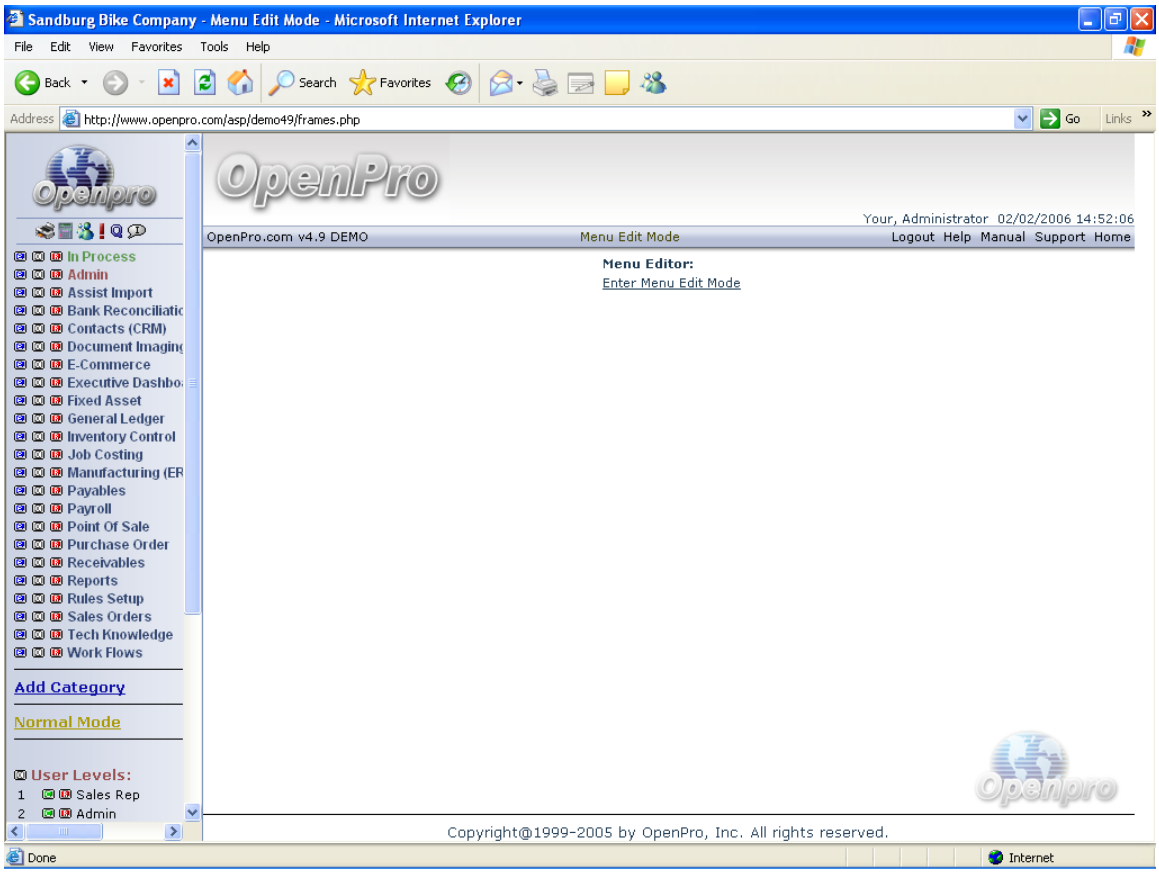
Enable Autohide. This will make the menu disappear until you move the mouse over to the far left of the screen then you will see the menu appear.

Disable Autohide.. This makes the menu fixed, always open and on top of the screen.

The Globe is used for instant the messaging between machines.

The Application menu is user definable, based upon your login id, you can have different items on this menu.

If you login as an administrator this gives you the capability to change the menu, names of the fields etc.



Exit the OpenPro Standard Solution

There are two ways to exit the OpenPro Standard Solution. You can click on the standard "X" icon in the upper righthand corner of the main application window. This will immediately close the application and return you to your computer desktop. Or you can use the System menu's **LOGOUT** OpenPro option. To exit the application and return to your computer desktop using this method, select the "**LOGOUT** OpenPro" option from the System Module's drop-down menu, as shown below:

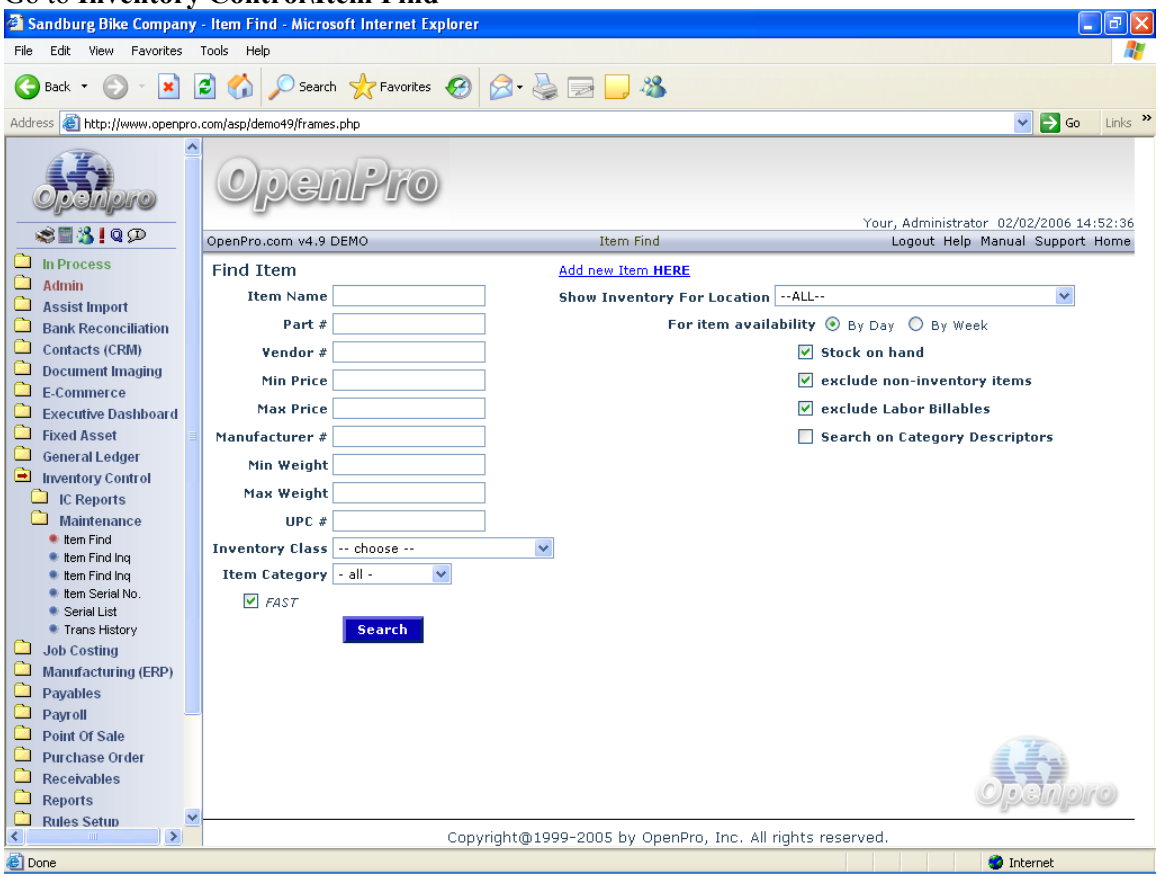
Figure 1.5: Exit OpenPro

After selecting this option, the application will close, returning you to your computer desktop.

Application Fundamentals

The OpenPro Standard Solution contains a number of fundamental features designed to simplify your use of the software. In this section, we describe those fundamentals in an effort to familiarize you with their use. Let's look first at a sample Inventory Item screen, as shown below. We will use this Item Search screen to illustrate several of the application fundamentals to be found throughout the application—across multiple screens and modules.

Go to **Inventory Control\Item Find**

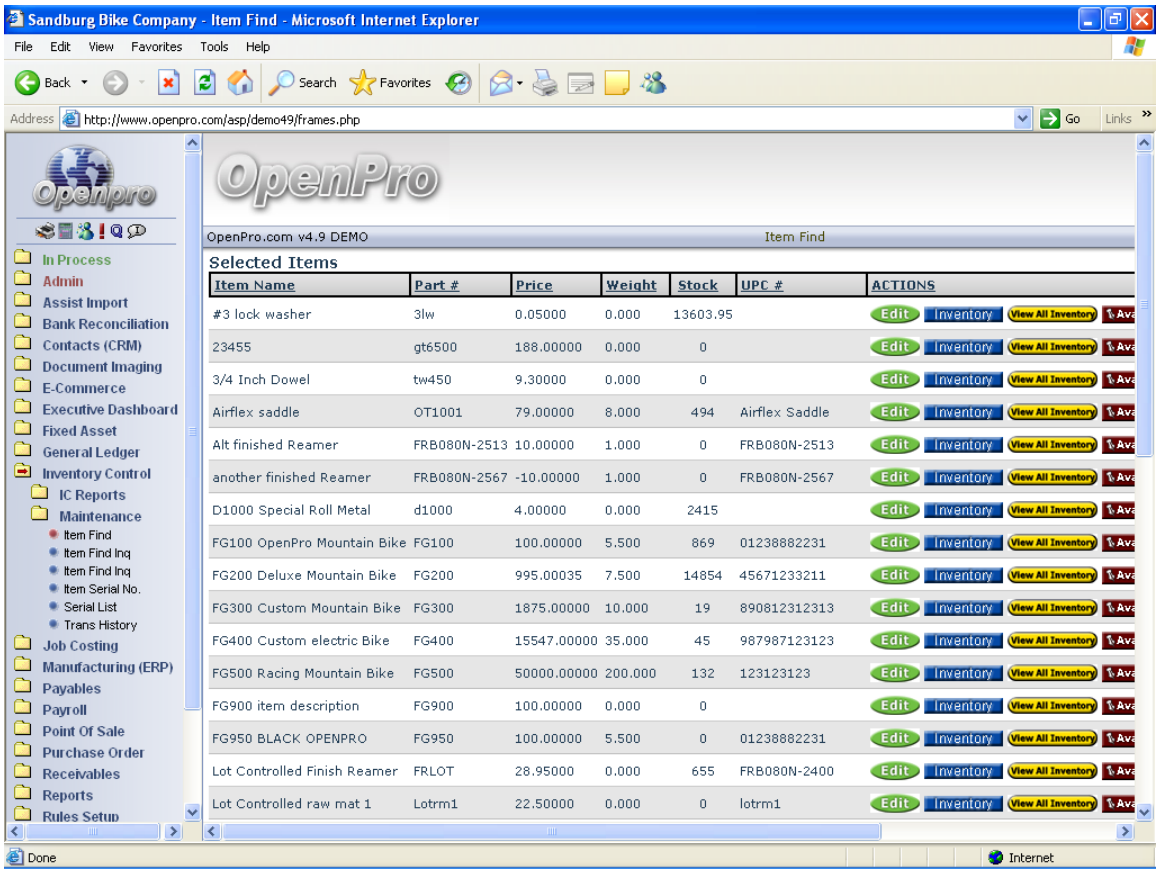


Search Screen

All the screens have many different options for searching records as well as sorting the data that is displayed on the screen. Also if you just hit the search button it will reply with all the records in the database. OpenPro ERP software has very powerful options with every search screen but also kept the logic simple for you.

In this example we can search items by the following categories:

Item #, Name or description, mfg number, weight and UPC. Data can also be searched by Item Category. If you have multiple warehouse locations you can narrow your search down by that single location. Each field can be searched using a **% for a wild card.** Example search **%FG%** to find all items that have FG in the item name. With our advance SQL database searches are fast and easy.



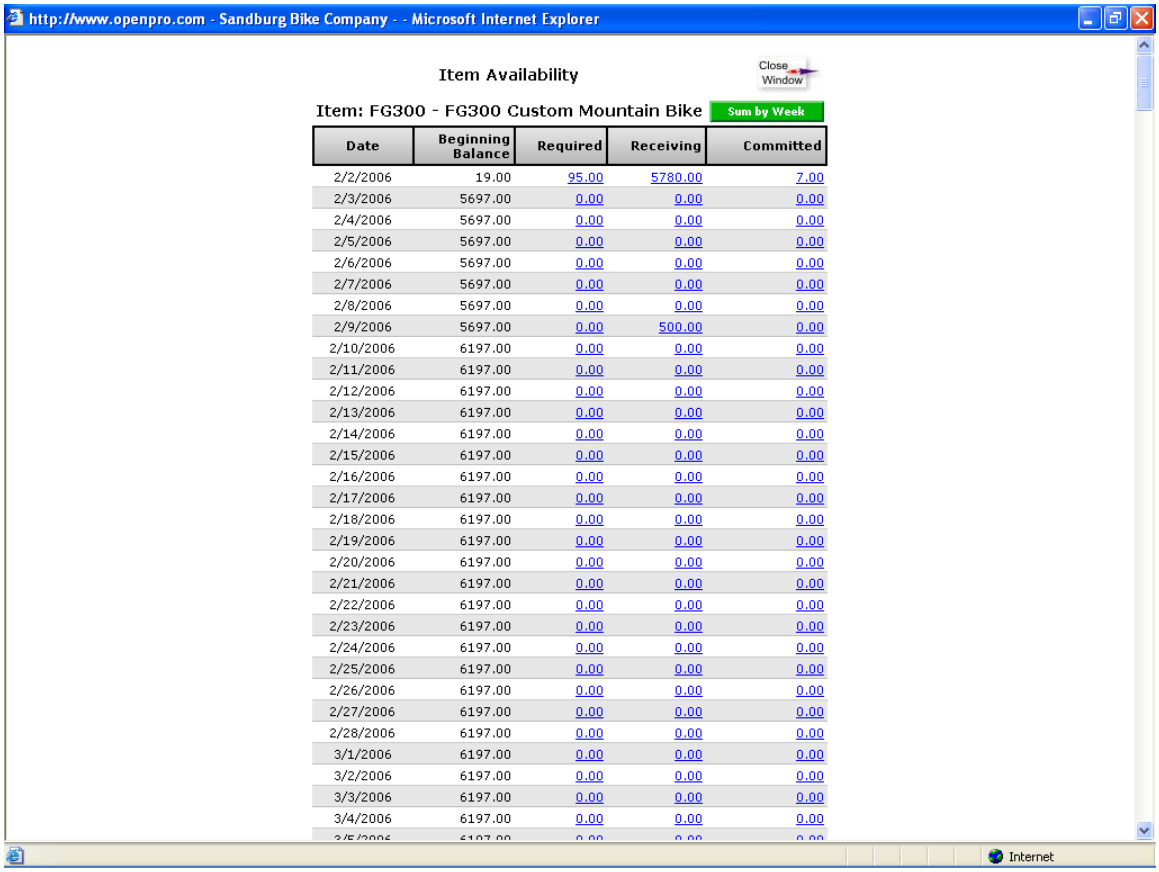
Once you received the result listing you can **sort** the listing by clicking on the top header of each column that is underlined.
If you have a large result, you can refine your search by using **the EDIT/FIND** option on your browser.
You can **print** the information by clicking on the **Printer** Icon from the menu bar or by right clicking your mouse and choosing the print option anywhere on the screen.

If at any time you want to change your search you can click on new search or click Item Find on the left menu bar.

Application Fundamentals

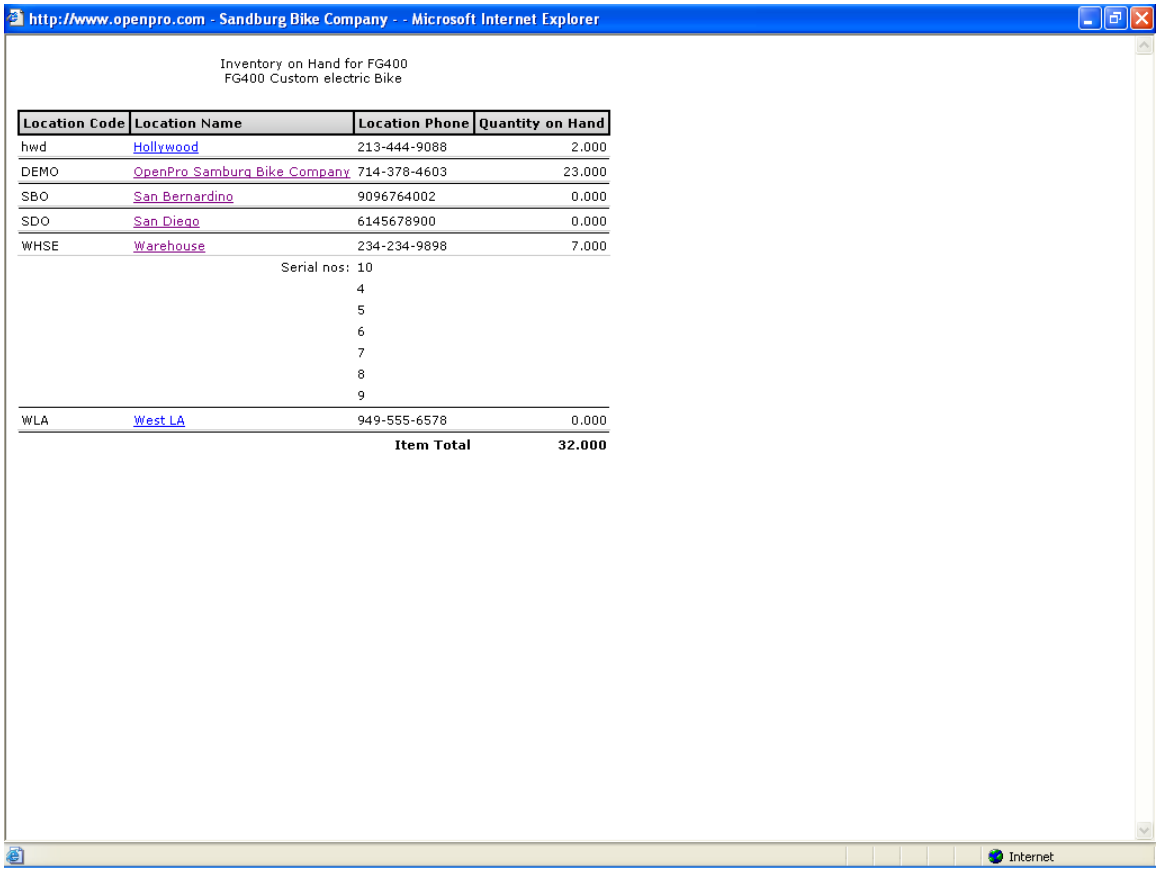
On the right side of the listing are **actions**. This is where you can drill down into more details about this record (items).

Here is the item availability screen that is used for **Available to Promise** for your customers.

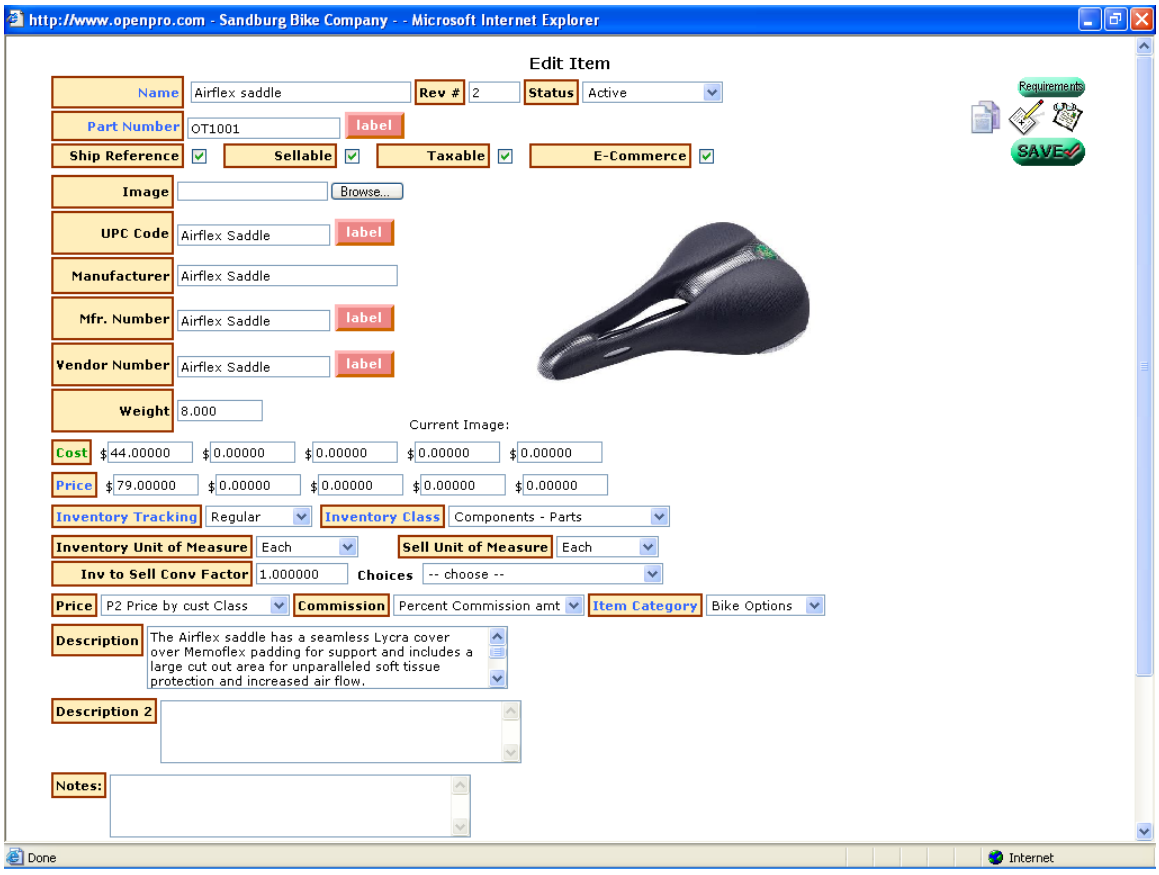


Date	Beginning Balance	Required	Receiving	Committed
2/2/2006	19.00	95.00	5780.00	7.00
2/3/2006	5697.00	0.00	0.00	0.00
2/4/2006	5697.00	0.00	0.00	0.00
2/5/2006	5697.00	0.00	0.00	0.00
2/6/2006	5697.00	0.00	0.00	0.00
2/7/2006	5697.00	0.00	0.00	0.00
2/8/2006	5697.00	0.00	0.00	0.00
2/9/2006	5697.00	0.00	500.00	0.00
2/10/2006	6197.00	0.00	0.00	0.00
2/11/2006	6197.00	0.00	0.00	0.00
2/12/2006	6197.00	0.00	0.00	0.00
2/13/2006	6197.00	0.00	0.00	0.00
2/14/2006	6197.00	0.00	0.00	0.00
2/15/2006	6197.00	0.00	0.00	0.00
2/16/2006	6197.00	0.00	0.00	0.00
2/17/2006	6197.00	0.00	0.00	0.00
2/18/2006	6197.00	0.00	0.00	0.00
2/19/2006	6197.00	0.00	0.00	0.00
2/20/2006	6197.00	0.00	0.00	0.00
2/21/2006	6197.00	0.00	0.00	0.00
2/22/2006	6197.00	0.00	0.00	0.00
2/23/2006	6197.00	0.00	0.00	0.00
2/24/2006	6197.00	0.00	0.00	0.00
2/25/2006	6197.00	0.00	0.00	0.00
2/26/2006	6197.00	0.00	0.00	0.00
2/27/2006	6197.00	0.00	0.00	0.00
2/28/2006	6197.00	0.00	0.00	0.00
3/1/2006	6197.00	0.00	0.00	0.00
3/2/2006	6197.00	0.00	0.00	0.00
3/3/2006	6197.00	0.00	0.00	0.00
3/4/2006	6197.00	0.00	0.00	0.00

Here is the **Show Inventory** screen, displaying the current stock on hand. Additionally you can see a drill down list of serialized items.



Here is the **Edit** screen, displaying the item and all its characteristics.



TAB Key

The TAB key on your keyboard may be used to move the cursor from one field to the next within any given data-entry screen. Simply place the cursor in the first field you want to enter data into—and when you're done entering data, hit the TAB key to move the cursor to the next field.
Also use the TAB key as a shortcut for converting date field entries to the proper format for your system. For example, in a "Start Date" field you might enter the numbers "022503". Then, with the cursor still blinking in the field, hit the TAB key. The date will be converted to "02/25/03"—or whatever the proper date format is for your system. Date formats are defined and maintained in the System Module.

CTRL Key

Three keyboard shortcuts are available whenever you place the cursor into an "Item Number" field. You saw the "Item Number" field in the Items example above. The "Item Number" field appears frequently throughout the application. Use the CTRL key—usually located on the bottom left-hand corner of your keyboard—in combination with either "S" to reach the three screens shown in the following examples:

Print (CTRL + P): Prints the contents of your screen.

Search (CTRL + S): Search for items using a variety of search criteria. This shortcut enables you to look up Items using partial values. In the above example, the User selected all available search options—the first line of the Item description, and/or the second line of the Item description.

ALT Key

If you depress the ALT key on your keyboard in combination with any of these underlined letters in your browser can be used for searching the results of the selection criteria For example, the following combination of keys will activate the FIND: ALT + E + F.

Common Application Buttons

Buttons occur frequently throughout the OpenPro ERP Solution. They are usually located to the far right side of the screen—and can be activated when you click your mouse once on them. The following descriptions define some of the more common application buttons used within the OpenPro Standard Solution:

X on top right: Closes the screen you are currently working on, without saving any information you may have entered. Returns you to the previous screen.

EDIT: Allows editing of information in a display.

SAVE: Saves any information you have entered to the OpenPro system.

PRINT: Sends the contents of a screen or report to your default printer, providing you have assigned a default printer or a selection for any printer you want to print to and have a printer device available either via your client computer or networked server.

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