



OpenPro ERP Software

OpenPro Application Demonstration Guide II

10061 Talbert Ave Suite 200

Fountain Valley, CA 92708

Telephone 714-378-4600

Fax 714-964-1491

www.openpro.com

infoop@openpro.com

Last Updated: March 2010

Table of Contents

Introduction	4
Application Fundamentals	11
Basic Process Flow	16
Getting Started	17
Payables	17
Receivables Aging and Cash Receipts	25
Financials	29
E-Commerce	37
CRM	43
Check Reconciliation	49
Service Billing	52
Point of Sale	58

Introduction

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

After your evaluation, if you have any questions about how we might assist your enterprise, do not hesitate to contact us at salesop@openpro.com or call 714-378-4600. And again, thank you for your interest. Your comments and suggestions are important to us.

On-line training processes

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

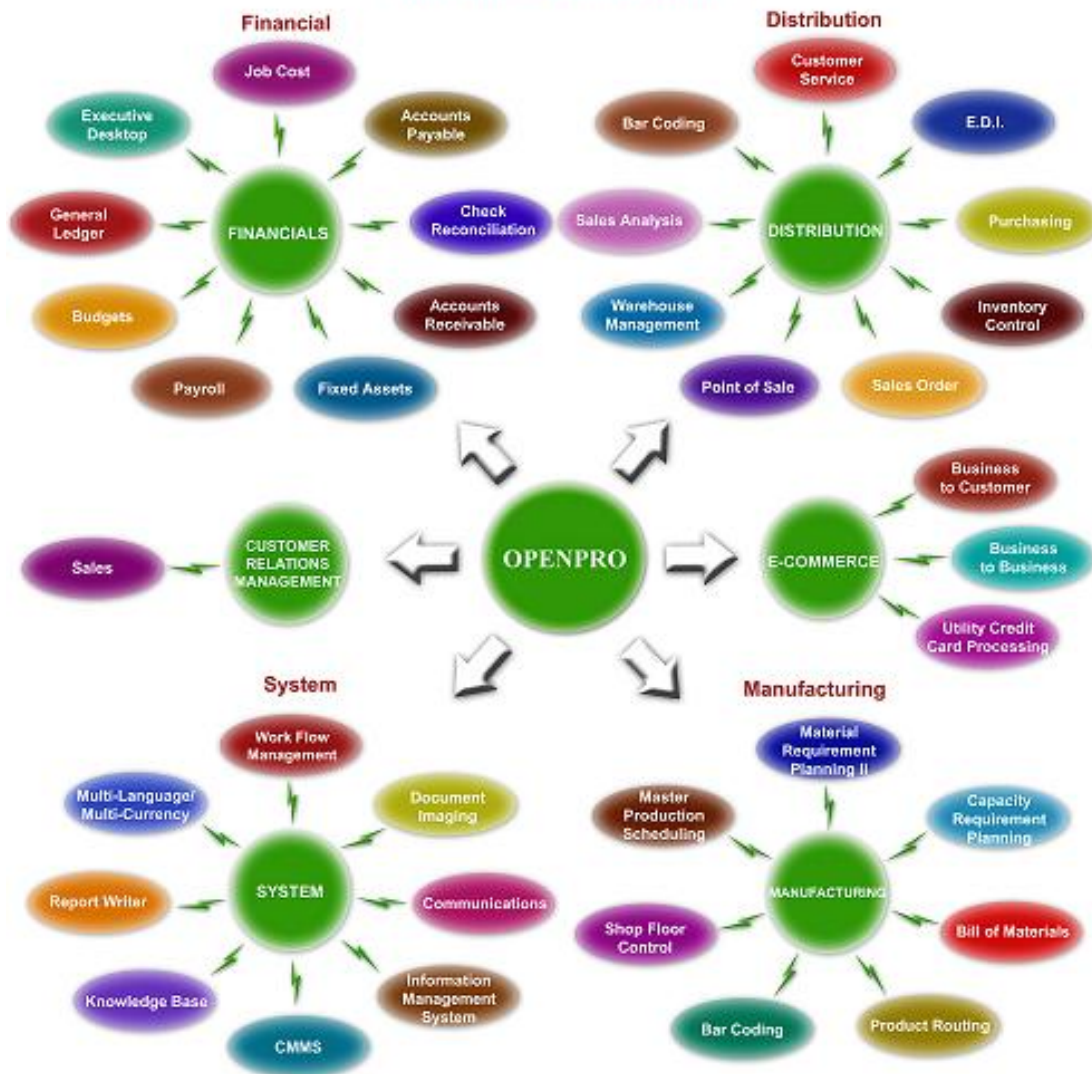
Or go to www.openpro.com/ol_training.html, which has general information on the OpenPro ERP packages. There are also video training sessions by application.



OpenPro ERP

The Open Source ERP Software Solution

More Value. More Features.

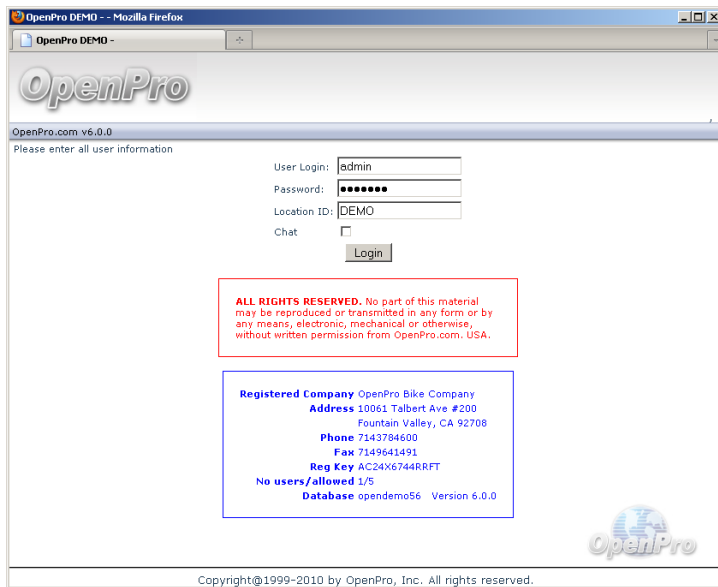


OpenPro standard system modules.

Log In to OpenPro ERP software

**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 do not 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; instead, asterisks (*) will represent the password 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 detailed 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 questions can be emailed to us at support@openpro.com.

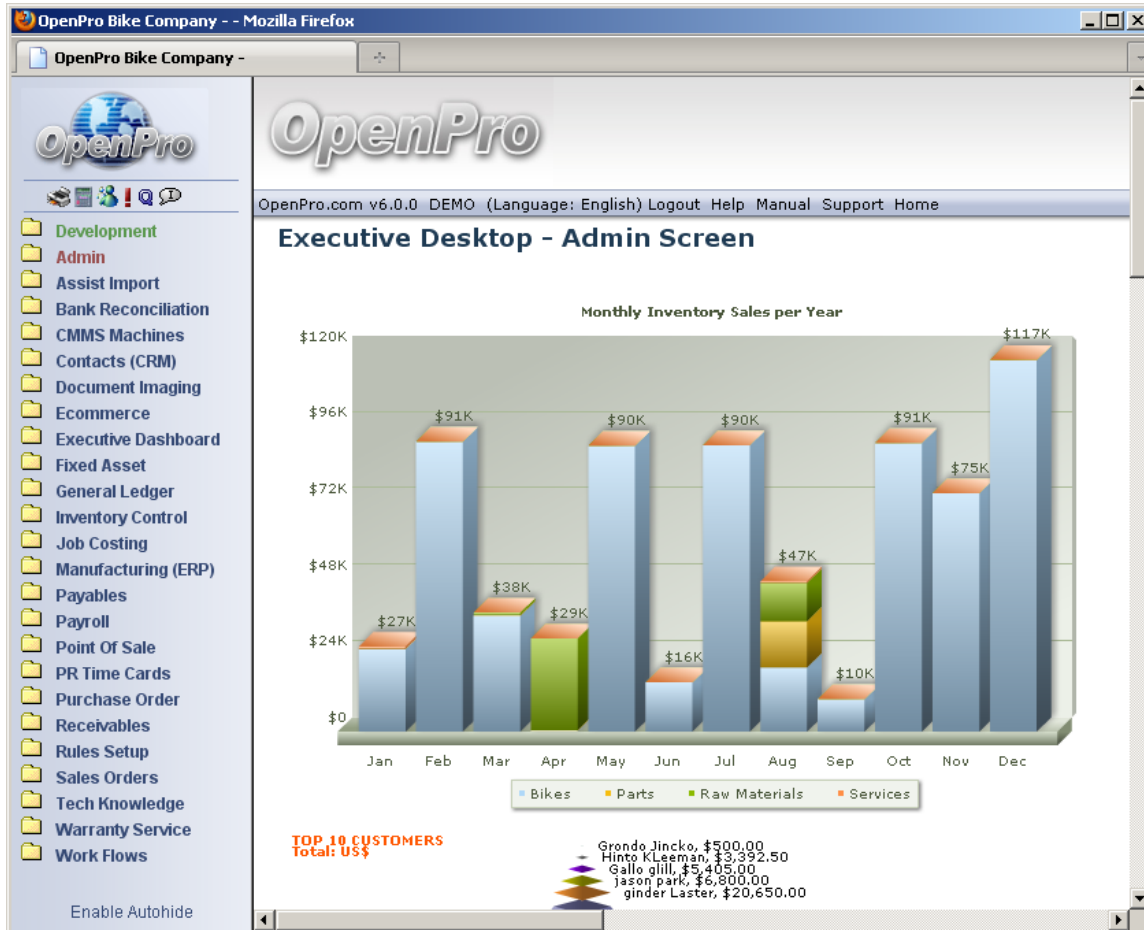
HOME: Takes you back to the main menu screen.

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



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, such as print reports. Also, you may choose to 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, your log in information, and the 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 detailed 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.

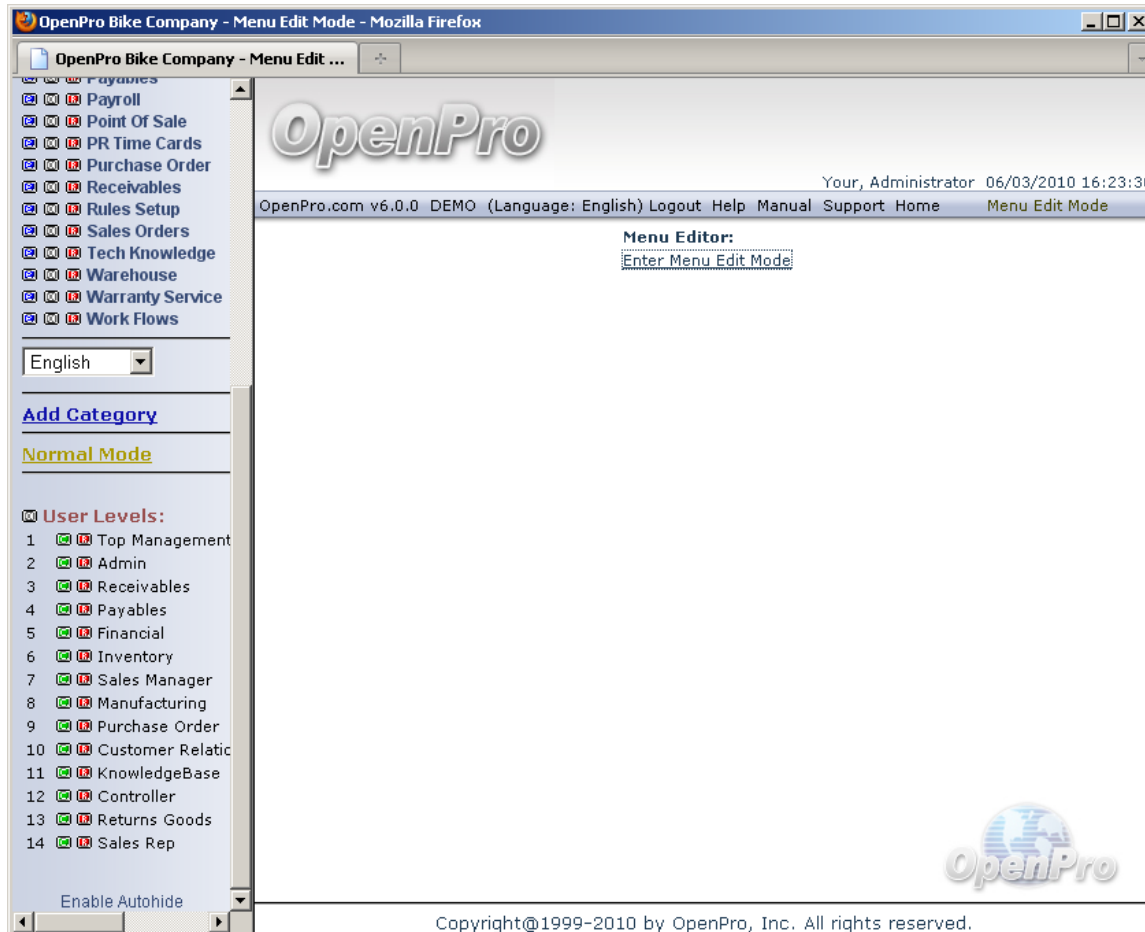
Disable Autohide: This makes the menu fixed, always open and on top of the screen.

The Globe is used for the messenger between machines.

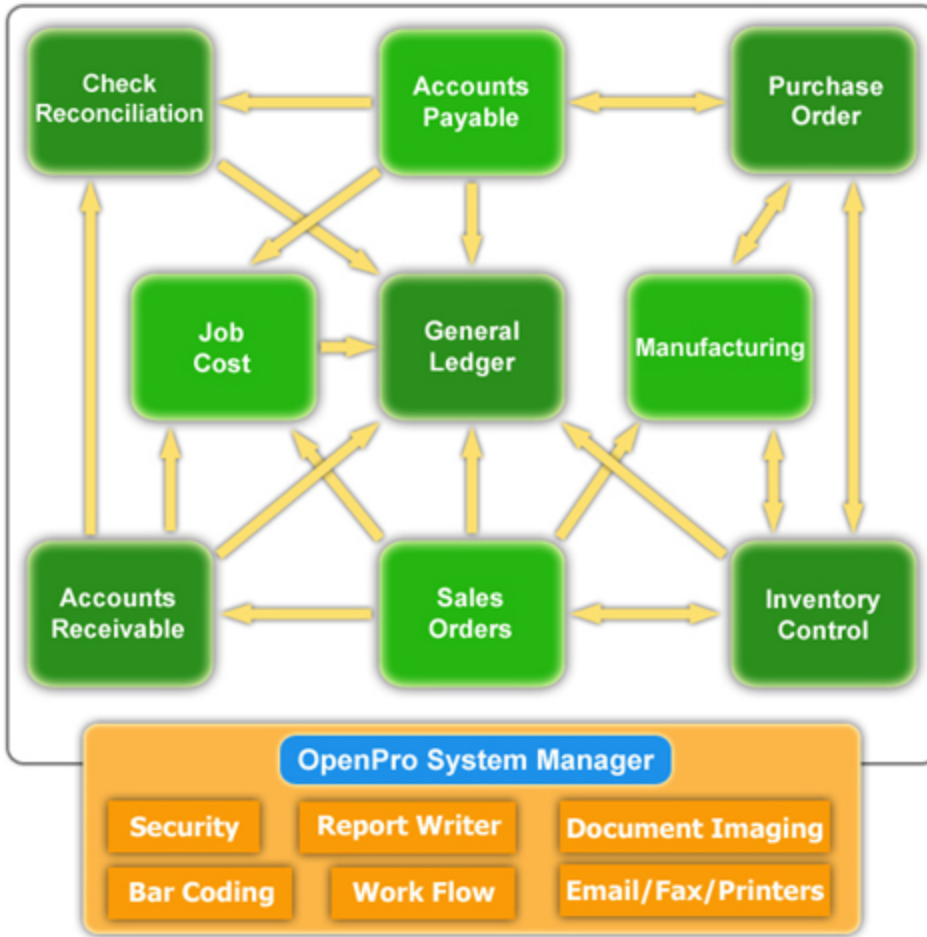
The Application menu is user definable, based upon your login ID you can have different items on this menu.

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

The menu system is fully customizable, with the menu editor, you can add change and delete menu items per login type. So, for example, someone in Accounts Payable only sees AP screen information.



OpenPro Data Flow

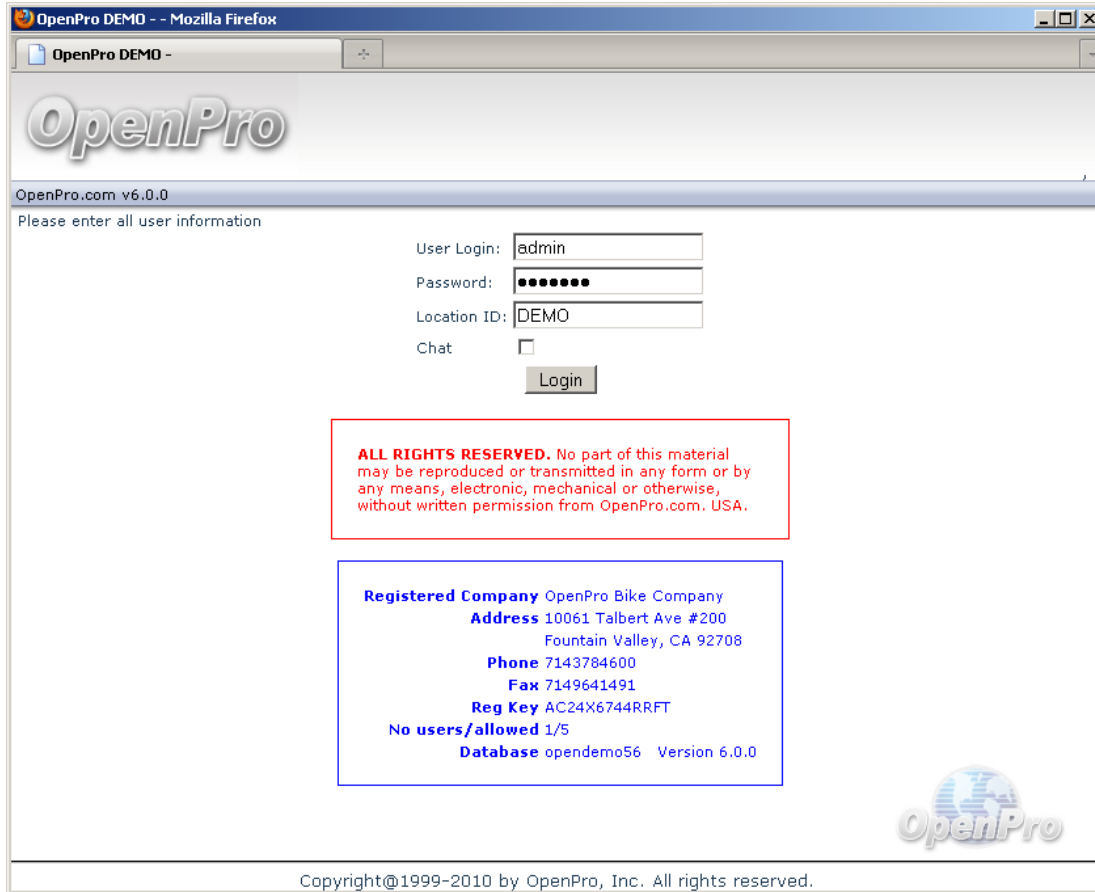


OpenPro data flow.

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. lecting 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 will describe these fundamentals in an effort to familiarize you with their use. First, look at a sample **Inventory Item** screen, as shown below. We will use this **Item Search** screen to illustrate several of the application fundamentals found throughout the application—across multiple screens and modules.

Go to Inventory Control\Item Find

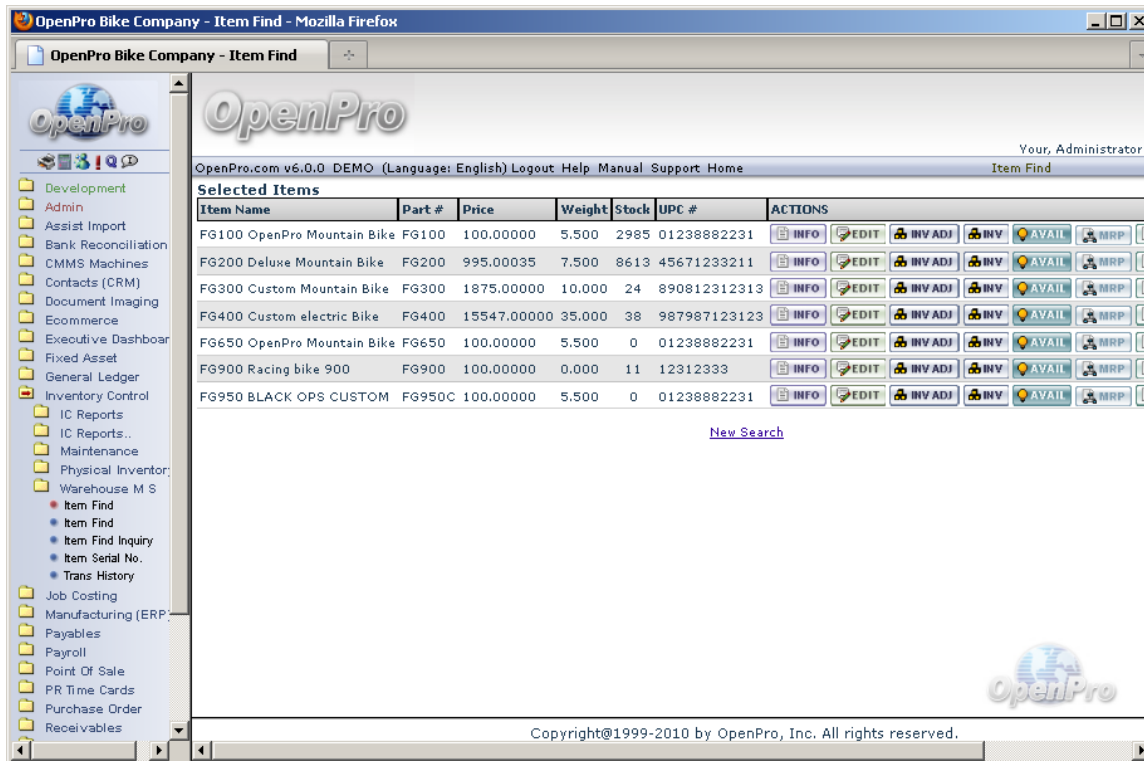


Search Screen

All of the search screens have various options for searching records as well as sorting the data that is displayed. Additionally, if you click on the “**Search**” button it will display all the records in the database. OpenPro ERP software has very powerful options with every search screen, while remaining easy to use.

In this example we can search items by the following categories: item #, name or description, mfg number, weight and UPC.

You can also search 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 advanced SQL database searches are fast and easy.



The screenshot displays the OpenPro Item Find interface. The main content area shows a table of selected items with the following data:

Item Name	Part #	Price	Weight	Stock	UPC #	ACTIONS
FG100 OpenPro Mountain Bike	FG100	100.00000	5.500	2985	01238882231	INFO EDIT INV ADJ INV AVAIL MRP
FG200 Deluxe Mountain Bike	FG200	995.00035	7.500	8613	45671233211	INFO EDIT INV ADJ INV AVAIL MRP
FG300 Custom Mountain Bike	FG300	1875.00000	10.000	24	890812312313	INFO EDIT INV ADJ INV AVAIL MRP
FG400 Custom electric Bike	FG400	15547.00000	35.000	38	987987123123	INFO EDIT INV ADJ INV AVAIL MRP
FG650 OpenPro Mountain Bike	FG650	100.00000	5.500	0	01238882231	INFO EDIT INV ADJ INV AVAIL MRP
FG900 Racing bike 900	FG900	100.00000	0.000	11	12312333	INFO EDIT INV ADJ INV AVAIL MRP
FG950 BLACK OPS CUSTOM	FG950C	100.00000	5.500	0	01238882231	INFO EDIT INV ADJ INV AVAIL MRP

Below the table is a "New Search" link. The interface includes a sidebar menu with options like Development, Admin, Assist Import, Bank Reconciliation, CMMS Machines, Contacts (CRM), Document Imaging, Ecommerce, Executive Dashboar, Fixed Asset, General Ledger, Inventory Control, IC Reports, IC Reports.., Maintenance, Physical Inventor, Warehouse M S, Item Find, Item Find Inquiry, Item Serial No., Trans History, Job Costing, Manufacturing (ERP), Payables, Payroll, Point Of Sale, PR Time Cards, Purchase Order, and Receivables. The footer contains the copyright notice: "Copyright@1999-2010 by OpenPro, Inc. All rights reserved."

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 doing a mouse right click and choose the print option. If at any time you want to change your search you can click on **New Search** or **Item Find** on the left menu bar.

On the right side of the listing are **actions**, where you are able to focus on specific details about a particular item.

Application Fundamentals

Here is an example of one of the action items you can select. It is the item availability screen that is used for **Available to Promise** for your customers.

Date	Beginning Balance	Required	Receiving	Committed
6/2/2010	2985.00	0.00	2597.00	4983.00
6/9/2010	599.00	0.00	0.00	0.00
6/16/2010	599.00	0.00	0.00	0.00
6/23/2010	599.00	0.00	0.00	0.00
6/30/2010	599.00	0.00	0.00	0.00
7/7/2010	599.00	0.00	0.00	0.00
7/14/2010	599.00	0.00	0.00	0.00
7/21/2010	599.00	0.00	0.00	0.00
7/28/2010	599.00	0.00	0.00	0.00
8/4/2010	599.00	0.00	0.00	0.00
8/11/2010	599.00	0.00	0.00	0.00
8/18/2010	599.00	0.00	0.00	0.00
8/25/2010	599.00	0.00	0.00	0.00
9/1/2010	599.00	0.00	0.00	0.00
9/8/2010	599.00	0.00	0.00	0.00
9/15/2010	599.00	0.00	0.00	0.00
9/22/2010	599.00	0.00	0.00	0.00
9/29/2010	599.00	0.00	0.00	0.00
10/6/2010	599.00	0.00	0.00	0.00
10/13/2010	599.00	0.00	0.00	0.00
10/20/2010	599.00	0.00	0.00	0.00
10/27/2010	599.00	0.00	0.00	0.00
11/3/2010	599.00	0.00	0.00	0.00
11/9/2010	599.00	0.00	0.00	0.00
11/16/2010	599.00	0.00	0.00	0.00
11/23/2010	599.00	0.00	0.00	0.00

Application Fundamentals

Here is the **Show Inventory** screen displaying the current stock on hand. Specifically shown is a lookup list of serialized items:

OpenPro Bike Company - inventory_store_list - - Mozilla Firefox


Inventory on Hand for FG100
FG100 OpenPro Mountain Bike

LocationCode	Location Name	Location Phone	On Hand	Allocated	Available	On Order 1	Available 1	On Order 2	Available 2
Consignment	Consignment	1212	89.000	0.000	89.000	0.000	0.000	0.000	0.000
DROPSHIP	DROPSHIP	7146548465	2010.000	0.000	2010.000	0.000	0.000	0.000	0.000
hwd	Hollywood	213-444-9088	25.000	0.000	25.000	0.000	0.000	0.000	0.000
DEMO	OpenPro Samburg Bike Company	714-378-4603	880.000	4983.000	-4103.000	10.000	890.000	1.000	891.000
SBO	San Bernardino	9096764002	-82.000	0.000	-82.000	0.000	0.000	0.000	0.000
SDO	San Diego	6145678900	0.000	0.000	0.000	0.000	0.000	0.000	0.000
WHSE	Warehouse	234-234-9898	63.000	0.000	63.000	0.000	0.000	0.000	0.000
WLA	West LA	949-555-6578	0.000	0.000	0.000	0.000	0.000	0.000	0.000
Item Total			2985.000	4983.000	-1998.000	10.000	890.000	1.000	891.000

Application Fundamentals

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

OpenPro Bike Company - item_maint -- Mozilla Firefox

Item 

Name FG200 Deluxe Mountain Bike Rev # 1 Status Active

Part Number FG200 Model Code

Ship Reference Sellable Taxable E-Commerce

General Dimensions Description Userdef Pictures

General

	Material	Labor	F.Overhead	V.Overhead	Outside	Total Cost
Cost	21.55000	0.11000	0.10000	0.01000	0.00000	21.77

Inventory Tracking Regular Inventory Class FGItem - Finished Goods item

Price 995.00035 990.00000 980.00000 970.00000 960.00000

Item Category Bikes


Image

UPC Code 45671233211

Manufacturer Open Pro Demo company

Mfr. Number FV200

Vendor Number OP

Current Image: 

Color Blue Size 17 Style Lake

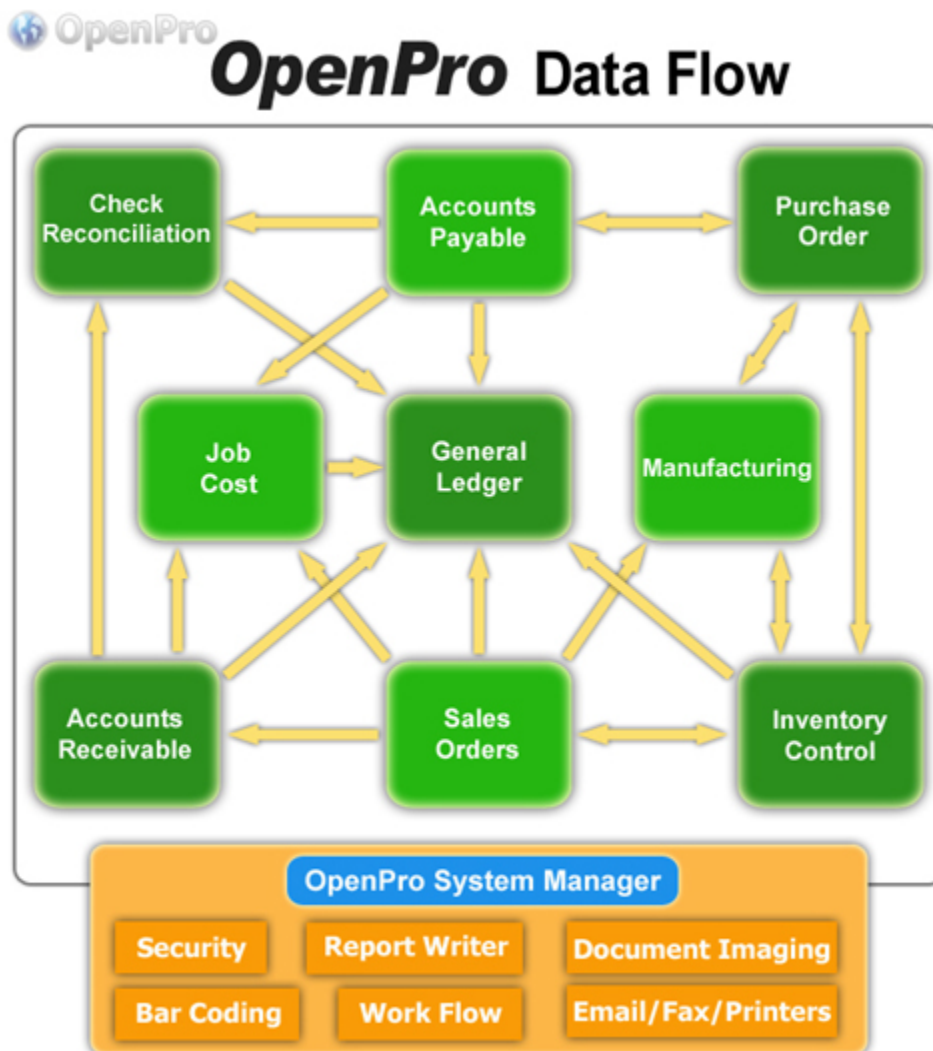
Height 54

Description	Description 2
Deluxe Mountain Bike with wood side rails	candy apple red color

Basic Process Flow

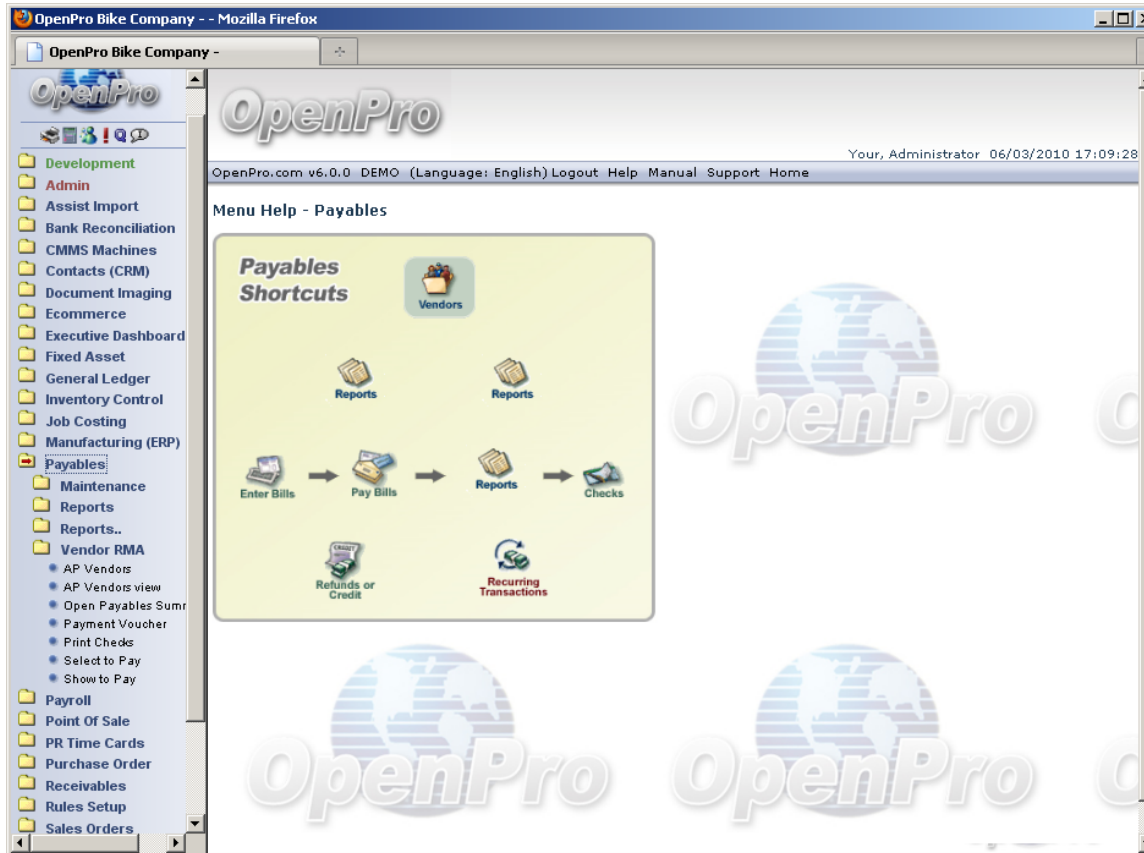
This section is a continuation of the *Application Demonstration Guide I* and is designed to introduce you to the basic process flow through the OpenPro Standard Solution. We have assembled a series of related screenshots to illustrate a logical sequence of business scenarios. We hope you find the scenarios to be useful. Feel free to test them out yourself. Your evaluation database comes pre-loaded with the same sample data used to generate the screen shots in this section.

The basic flow starts with **Payables, Receivables Aging and Cash Receipts, Financials, E-commerce, Customer Relationship Management, Check Reconciliation, Service Billing** and then **Inventory Control and Point of Sale**.



Getting Started with Payables

After you log in, go to the “Payables” sub menu,



and then the sub menu “A/P Vendors”.

Here you can enter a vendor name and specifically search by any of the options listed. If you would like to see a list of all vendors, simply click on “Search” with no value entered in the “Search For” box.

Getting Started with Payables

This first screen shows a list of Vendors. You can click on “search” to display all the customers.

The screenshot displays the OpenPro software interface in a Mozilla Firefox browser window. The main content area shows a table titled "Select Vendors" with a "MASS EMAIL" button above it. The table lists several vendors with their respective details. A "New Search" link is located below the table. The left sidebar contains a navigation menu with various system functions. The footer of the interface includes the OpenPro logo and the text "Copyright@1999-2010 by OpenPro, Inc. All rights reserved."

Name	Company	Vendor Ref#	Address	Phone #	City	State	Country	
	Computer Management Services L 7		70 Essex Rd.	(800)533-5595	Westbrook	CT	USA	INFO EDIT
Luvik, Gil	Delivery Company	3	234 Gastro Street	8900900 4181	Hartford	CT		INFO EDIT
Smitty, Sable	Finnion Rainbow Inc	2000	55 Tinhorn St # 23a	(888)981-3244	Peacock	WV	USA	INFO EDIT
Zenhouse, Jim	Gashouse Fixtures		90322 Miner Lane	(909)451-2005	Jinton	CA	USA	INFO EDIT
Lopez, Jennifer	Metal Fab company	6	123 rich people only street	(714)555-1234	Hollywood	CA	USA	INFO EDIT
	Metal ginger inc	4	899 Celery lane	(800)500-1394	Cuntung	KS	USA	INFO EDIT
Steel, John	Metal Supply Company	1000	123 Real Metal Lane	(432)611-9275	Metal city	AL	USA	INFO EDIT

For this demonstration, please select Metal Supply Company. From this sub menu you can view vendor information, edit the vendor, enter in new vouchers, as well as view templates for vouchers.

Getting Started with Payables

When you select “Edit” for the Vendor, the Vendor Edit screen pops up, as shown below:

Edit Vendor

Vendor Information

Company Metal Supply Company Disable:
[Map](#) [Directions](#) [Mailing Label](#)

Name(first,MI,last) John Steel

Title OWNER

General **Remit to** **Config** **User def** **Logo**

General

Billing E-Mail JOHN@METALSUPPLY.COM

Password

Address 123 Real Metal Lane **Address 2** suite 200

City Metal city

State Code ALABAMA

State / Province (Non-US only)

Country USA

Zip 05467

Phone Number 432-611-9275

Cell Number

Fax Number 432-222-1245

Date Added (mm/dd/yyyy) **Added By**

Default AP class Parts Purchases / 20000-000 / 50700-000 / 50700-000 / 50500-000

Default AP Account 20000-000 | Accounts payable |

Alternate Contacts [Edit Current](#) [New](#)
[Alternate](#)

Getting Started with Payables

Click on “Enter Voucher”:

Add
[Show Details](#)
Vendor: Metal Supply Company / John Steel / (432)611-9275 / JOHN@METALSUPPLY.COM

Set defaults: Template: Rent PAINT AP Class: Purchases/Parts Purchases PAINTCLASS

Invoice #: P. O. / Reference: [View PO](#) [Find PO](#) [Receiver](#) Doc Type: Voucher
 Invoice Date: 06/03/2010 Payment Terms: net30 / payable net 30 AP account: 20000-000
 Due Date: 07/03/2010 GL Date: 06/03/2010 On 1099: Rents
 Notes:

Location: DEMO / OpenPro Sa Select your account: Select Apply Prepayment: - choose -

Location	Account No	Account Description	Description	Project/Sub-Pro/Task	Debit	Credit
DEMO	50700-000	Inventory expenses			0.00	0.00
DEMO	50500-000	Purchase discounts			0.00	0.00
					0.00	0.00
					0.00	0.00
					0.00	0.00
					0.00	0.00

Amount to Pay: 0.00
 Currency/Rate: default 1 Amount: 0.00

[5 MORE LINES](#) [Post Print](#) [Post Close](#) [Post Add](#) On Hold

Import File: [Browse...](#) [Import File](#)

Vouchers can be entered manually as seen on the screen above, or created from purchase orders. When entering in purchase orders, you can use templates to make the entry faster for recurring payables processing. When you are finished processing this transaction, you can print a check immediately or post the voucher and pay it later. Once the transaction is posted, data is updated by Vendor and General Ledger.

Getting Started with Payables

The “Select to Pay” sub menu is used to select vouchers manually, automatically or run a payables aging report.

The screenshot shows the OpenPro software interface for the 'Select to Pay' function. The window title is 'OpenPro Bike Company - Select to Pay - Mozilla Firefox'. The main content area is titled 'OpenPro' and includes a navigation menu on the left and a main form area.

Navigation Menu (Left):

- Development
- Admin
- Assist Import
- Bank Reconciliation
- CMMS Machines
- Contacts (CRM)
- Document Imaging
- Ecommerce
- Executive Dashboard
- Fixed Asset
- General Ledger
- Inventory Control
- Job Costing
- Manufacturing (ERP)
- Payables**
 - Maintenance
 - Reports
 - Reports..
 - Vendor RMA
 - AP Vendors
 - AP Vendors view
 - Open Payables Sum
 - Payment Voucher
 - Print Checks
 - Select to Pay**
 - Show to Pay
- Payroll
- Point Of Sale
- PR Time Cards
- Purchase Order

Main Form Area:

OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home Select to Pay

Your, Administrator 06/03/2010 17:12:39

Select Vouchers To Pay **By Vendor** **By Voucher** **Either** **Both**

Search For:

Vendor	Voucher	Sort
<input type="text"/>	Number: <input type="text"/>	Vendor Company name ascending
<input checked="" type="radio"/> Company	Minimum Due Date: <input type="text"/> (MM/DD/YYYY)	<input checked="" type="checkbox"/> FAST
<input type="radio"/> Vendor Number	Maximum Due Date: <input type="text"/> (MM/DD/YYYY)	<input type="checkbox"/> Include Vendor Detail (aging)
<input type="radio"/> Last Name	Minimum Invoice Date: <input type="text"/> (MM/DD/YYYY)	<input checked="" type="checkbox"/> Include Vendor Totals (aging)
<input type="radio"/> First Name	Maximum Invoice Date: <input type="text"/> (MM/DD/YYYY)	<input type="checkbox"/> Summary by Vendor (aging)
<input type="radio"/> Address	Rep: <input type="text"/>	<input type="checkbox"/> Multi-Currency
<input type="radio"/> E-Mail Address	Purchase Order: <input type="text"/>	
<input type="radio"/> Social Security #	Cash Account: <input type="text"/>	
<input type="radio"/> Phone Number	Exclude Vouchers with Prefix: <input type="text"/>	
<input type="radio"/> Cell Number	<small>separate by commas does not apply to aging reports</small>	
Pay Group: <input type="text"/>	<input checked="" type="checkbox"/> Exclude Vouchers On Hold	
Vendor Type: <input type="text"/>		

Copyright©1999-2010 by OpenPro, Inc. All rights reserved.

Getting Started with Payables

When you select “View Selected Vouchers for Payment”, all the open items selected to be paid will be displayed, including a total for the payables run.

OpenPro Bike Company - Select to Pay - Mozilla Firefox

OpenPro Bike Company - Select to Pay

OpenPro

Your, Administrator 06/03/2010 17:12:55

OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home [Select to Pay](#)

[Click to select all](#)

Selected Vouchers for Payment

Pay All	Pay Part	On Hold	Amt to Pay	Left To Pay	Vendor	Vendor Number	Voucher	Invoice Number	Invoice Date	Due Date	Voucher Total
<input checked="" type="checkbox"/>	<input type="checkbox"/>		1231231.00	1,231,231.00	Metal Supply Company / John Steel	1000	416	123123123f	06/03/2010	07/03/2010	US\$1,231,231.00
<input type="checkbox"/>	<input type="checkbox"/>			6,655.00	Metal Supply Company / John Steel	1000	417	123123gghj	06/03/2010	07/03/2010	US\$6,655.00

Make indicated selections & show all to pay
 Make indicated selections & show select to pay
 Revise search and try again
 Clear all selections to pay

Copyright@1999-2010 by OpenPro, Inc. All rights reserved.

OpenPro Bike Company - Select to Pay - Mozilla Firefox

OpenPro Bike Company - Select to Pay

OpenPro

Your, Administrator 06/03/2010 17:13:41

OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home [Select to Pay](#)

All Vouchers Set for Payment

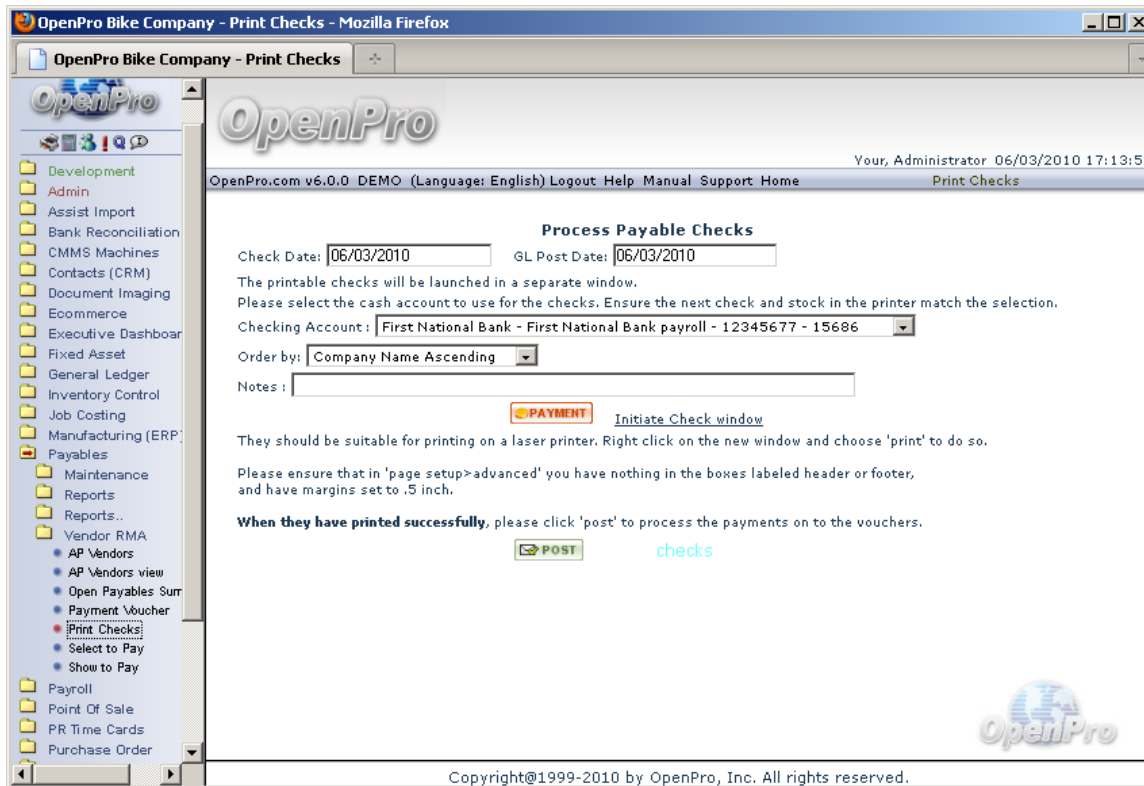
3 vouchers 3 checks

Remove	Amt to Pay	Left To Pay	Vendor	Voucher	Doc Date	Due Date	Voucher Total
<input type="checkbox"/>	1.00	1.00	Computer Management Services L/	393	04/23/2007	04/06/2010	US\$1.00
<input type="checkbox"/>	95.00	95.00	Finnion Rainbow Inc / Sable Smitty	392	03/21/2007	07/07/2009	US\$95.00
<input type="checkbox"/>	150.00	150.00	Metal Supply Company / John Steel	354	09/14/2005	01/23/2009	US\$150.00
	246		Amount to be Paid		Process Removals		

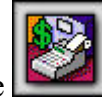
Copyright@1999-2010 by OpenPro, Inc. All rights reserved.

Getting Started with Payables

Print Checks processes all the selected A/P Vouchers in the prior step. You begin by selecting the A/P checkbook to print checks.



Getting Started with Payables



To Print a Payables Aging Report, run Select to Pay then click on the “Make Printable Aging” Icon.

This prints an Open Aging report for Payables.

OpenPro Bike Company - Select to Pay - Mozilla Firefox

OpenPro Bike Company - Select to Pay

OpenPro

Your, Administrator 06/03/2010 17:14:18

OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home Select to Pay

Accounts Payable to June 03, 2010

Vendor	Invoice #	Invoice Date	Due Date	0-30 Days	30-60 Days	60-90 Days	90-120 Days	120+ Days
Finnion Rainbow Inc/Sable Smitty	5556	09/18/2009	09/18/2009	0.00	0.00	0.00	0.00	50.00
	ag432qsag	05/12/2010	05/12/2010	95.00	0.00	0.00	0.00	0.00
	Balance	US\$145.00	Total	US\$95.00	0.00	0.00	0.00	50.00
Metal ginger inc/	5555555	04/07/2009	04/07/2009	0.00	0.00	0.00	0.00	100.00
	Balance	US\$100.00	Total	US\$0.00	0.00	0.00	0.00	100.00
Metal Supply Company/John Steel	testim	03/10/2009	03/10/2009	0.00	0.00	0.00	0.00	10,000.00
	121245767	04/28/2009	05/25/2009	0.00	0.00	0.00	0.00	702.44
	123123ccc	04/28/2009	05/25/2009	0.00	0.00	0.00	0.00	500.00
	123123123	04/29/2009	05/27/2009	0.00	0.00	0.00	0.00	123.00
	15000000	05/08/2009	06/08/2009	0.00	0.00	0.00	0.00	15,000,000.00
	inv123	06/10/2009	07/10/2009	0.00	0.00	0.00	0.00	308.00
	inv6	06/10/2009	07/10/2009	0.00	0.00	0.00	0.00	100.00
	rent0506	09/04/2009	09/04/2009	0.00	0.00	0.00	0.00	100.00
	2ffsf	10/30/2009	10/30/2009	0.00	0.00	0.00	0.00	400.00
	12312312	12/18/2009	12/18/2009	0.00	0.00	0.00	0.00	100.00
	Invoicenum	01/11/2010	01/11/2010	0.00	0.00	0.00	0.00	100.00
	123aa	05/12/2010	06/11/2010	123.00	0.00	0.00	0.00	0.00
	123ff	05/12/2010	06/11/2010	123.00	0.00	0.00	0.00	0.00
	123ddsa	05/12/2010	06/11/2010	123.00	0.00	0.00	0.00	0.00
	123bb	05/12/2010	06/11/2010	123.00	0.00	0.00	0.00	0.00
	123qq	05/12/2010	06/11/2010	123.00	0.00	0.00	0.00	0.00

Getting Started with Receivables

Customer Find: Search for a customer by company name, first name, last name or any of the other options displayed.



Select Last Name and click on “Search”.

Getting Started with Receivables

The screenshot displays the OpenPro software interface within a Mozilla Firefox browser window. The browser title is "OpenPro Bike Company - Customer Find - Mozilla Firefox". The page title is "OpenPro Bike Company - Customer F...". The interface features a left-hand navigation menu with various modules such as "Bank Reconciliation", "CMMS Machines", "Contacts (CRM)", "Document Imaging", "Ecommerce", "Executive Dashboard", "Fixed Asset", "General Ledger", "Inventory Control", "Job Costing", "Manufacturing (ERP)", "Payables", "Payroll", "Point Of Sale", "PR Time Cards", "Purchase Order", "Receivables", "Rules Setup", "Sales Orders", "Tech Knowledge", "Warranty Service", and "Work Flows". The "Receivables" module is expanded, showing sub-items like "AR Commission", "AR Reports", "AR Reports..", "Maintenance", "AR Cash Receipts", "Customer Find", "Customer Find New", "Open Summary", "Open Receivables", "Receivable Aging", and "Receivable Aging Pa".

The main content area displays the "OpenPro" logo and the text "OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home". Below this, it states "3 customers found." and provides a "MASS EMAIL" button. A table titled "Selected Customers" lists the following information:

Name Company	Ref # Phone #	Address	Actions
Computer Management Services L	458 (800)533-5595	70 Essex Rd. Westbrook,CT	INFO EDIT HISTORY PAST INV
Mathers, Harry S Computer Bike Services LLC	458HR (800)533-0595	70 Essex Rd. Fountain Valley,CA	INFO EDIT HISTORY PAST INV
Mr. Smith, Frank DD Cocanut Oil Dist CO	6 (714)964-2140	10061 tablert ave Suite 203 Fountain Valley,CT	INFO EDIT HISTORY PAST INV

Below the table, there is a "New Search" link. The footer of the page contains the text "Copyright@1999-2010 by OpenPro, Inc. All rights reserved." and the OpenPro logo.

From this screen you can select View, Edit Customer Information, Process Cash Receipts, Receivables, Templates and Update Ship to Addresses.

Getting Started with Receivables

The Receivables Aging Report displays all the open receivables by customer or open item:

The screenshot shows the OpenPro software interface for generating a Receivable Aging report. The window title is "OpenPro Bike Company - Receivable Aging - Mozilla Firefox". The main content area is titled "OpenPro" and includes a navigation menu on the left and a main form area.

Navigation Menu (Left):

- Bank Reconciliation
- CMMS Machines
- Contacts (CRM)
- Document Imaging
- Ecommerce
- Executive Dashboard
- Fixed Asset
- General Ledger
- Inventory Control
- Job Costing
- Manufacturing (ERP)
- Payables
- Payroll
- Point Of Sale
- PR Time Cards
- Purchase Order
- Receivables
 - AR Commission
 - AR Reports
 - AR Reports..
 - Maintenance
 - AR Cash Receipts
 - Customer Find
 - Customer Find View
 - Open Summary
 - Open Receivables
 - Receivable Aging
 - Receivable Aging Pa
- Rules Setup
- Sales Orders
- Tech Knowledge
- Warranty Service
- Work Flows

Main Form Area:

OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home

Your, Administrator 06/03/2010 17:15:18

Receivable Aging

Select Receivables for Report By Customer By Invoice Either Both

CustomerCustomer Invoice

Number

By Last Name First Name Address Company E-Mail Address Customer Reference # Social Security # Date of Birth Phone Number Cell Number

Due Date to

Entry Date to

Invoice Date to

Representative - choose -

Purchase Order

Sort Company, Entry Date ascending

FAST

Include Customer Detail (aging)

Include Customer Totals (aging)

Summary by Customer (aging)

Multi-Currency

Copyright©1999-2010 by OpenPro, Inc. All rights reserved.

Getting Started with Receivables

The Receivables Aging Report displays all the open receivables by customer or open item:

OpenPro Bike Company - Receivable Aging - Mozilla Firefox

OpenPro Bike Company - Receivable ...

OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home

Your, Administrator 06/03

Receivable Aging

Accounts Receivable For June 03, 2010

Customer	Unapplied Cash	Invoice #	Invoice Date	Due Date	0-30 Days	30-60 Days	60-90 Days	90-120 Days
ginder Laster/12	0.00	<u>1004</u>	09/07/2007	09/21/2007				
		<u>10001</u>	09/07/2007	10/05/2007				
		<u>90922</u>	12/28/2007	12/28/2007				
		<u>1005</u>	01/08/2010	02/01/2010				
		<u>1098</u>	07/15/2009	04/09/2010				
		<u>1093</u>	07/15/2009	04/09/2010				
		Balance	28,125.21	Total	0.00	0.00	0.00	0.0
Grondo Jincko/423	0.00	<u>4567</u>	07/11/2008	08/08/2008				
		<u>1103</u>	07/15/2009	04/09/2010				
		<u>1102</u>	11/27/2009	12/28/2009				
		Balance	752.50	Total	0.00	0.00	0.00	0.0
gono Smith/25	0.00	<u>345345</u>	02/29/2008	02/29/2008				
		<u>1134</u>	03/26/2010	04/28/2009			91.81	
		Balance	635.81	Total	0.00	0.00	91.81	0.0
Kane Lale/50	0.00	<u>1280</u>	09/11/2009	10/09/2009				
		<u>1279</u>	09/11/2009	10/09/2009				
		Balance	3,176.09	Total	0.00	0.00	0.00	0.0
George Thinert/52	0.00	<u>1090</u>	07/15/2009	04/09/2010				
		Balance	462.10	Total	0.00	0.00	0.00	0.0

Getting Started with Financials General Ledger

The Financials General Ledger is a full-featured financial package. OpenPro also integrates with other reporting packages and exports the reports to Excel.

The screenshot displays the OpenPro software interface for the 'OpenPro Bike Company - Chart of accounts'. The main window shows a list of accounts with the following columns: Edit, Account No, Inactive, Account Description #1, Account Description #2, Finance Type, Statement Account Type, Balance Type, Summary Type, Notes, and Delete. The table contains 14 rows of account data.

Edit	Account No	Inactive	Account Description #1	Account Description #2	Finance Type	Statement Account Type	Balance Type	Summary Type	Notes	Delete
Edit	10000-000	No	Cash account #13557		Balance	Assets	Debit	Summary		Delete
Edit	10000-001	No	newcash		Balance	Assets	Debit	Summary		Delete
Edit	10100-000	No	Cash account #13726		Balance	Assets	Debit	Summary		Delete
Edit	10200-000	No	Cash Account #3		Balance	Assets	Debit	Summary		Delete
Edit	11100-000	No	Cash account #13726		Balance	Assets	Debit	Summary		Delete
Edit	11200-000	No	Cash account #13557		Balance	Assets	Debit	Summary		Delete
Edit	12000-000	No	Accounts Receivable		Balance	Assets	Debit	Summary		Delete
Edit	13000-000	No	Furniture and fixtures		Balance	Assets	Debit	Summary		Delete
Edit	13100-000	No	Accumulated depreciation		Balance	Assets	Debit	Summary		Delete
Edit	13200-000	No	Work in process		Balance	Assets	Debit	Summary		Delete
Edit	14000-000	No	Inventory		Balance	Assets	Debit	Summary		Delete
Edit	14500-000	No	Cost of jobs		Balance	Assets	Debit	Summary		Delete
Edit	20000-000	No	Accounts payable		Balance	Liability	Credit	Summary		Delete
Edit	20050-000	No	Retainage payable		Balance	Liability	Credit	Summary		Delete

OpenPro has a full 64 digit chart of accounts that is user definable. It comes with a standard chart of account that can be updated or you can import your own chart of accounts into the system.

Getting Started with Financials General Ledger

With the open architecture you can have as many open years as you need. OpenPro can handle up to thirteen periods per year.

OpenPro
OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home

Search by fiscal year

List Fiscal Years
[Add a New Fiscal Period](#)

Edit	Fiscal Year	Current Period	Reporting Period	1. Beginning Date	1. Ending Date	1. Closed	2. Beginning Date	2. Ending Date	2. Closed	3. Beginning Date	3. Ending Date
Edit	2000	1	2000-01-01	01/01/2000	01/31/2000	<input checked="" type="checkbox"/>	02/01/2000	02/29/2000	<input checked="" type="checkbox"/>	03/01/2000	03/31/2000
Edit	2001	1	2001-01-04	01/01/2001	01/31/2001	<input checked="" type="checkbox"/>	02/01/2001	02/28/2001	<input checked="" type="checkbox"/>	03/01/2001	03/31/2001
Edit	2002	1	2002-01-01	01/01/2002	01/31/2002	<input checked="" type="checkbox"/>	02/01/2002	02/28/2002	<input checked="" type="checkbox"/>	03/01/2002	03/31/2002
Edit	2003	5	2003-11-01	01/01/2003	01/31/2003	<input checked="" type="checkbox"/>	02/01/2003	02/28/2003	<input checked="" type="checkbox"/>	03/01/2003	03/31/2003
Edit	2005	3	2004-01-01	01/01/2004	01/31/2004	<input checked="" type="checkbox"/>	02/01/2004	02/29/2004	<input checked="" type="checkbox"/>	03/01/2004	03/31/2004
Edit	2006	1	2005-01-01	01/01/2005	01/31/2005	<input checked="" type="checkbox"/>	02/01/2005	02/28/2005	<input checked="" type="checkbox"/>	03/01/2005	03/31/2005
Edit	2007	1	2006-01-01	01/01/2006	01/31/2006	<input checked="" type="checkbox"/>	02/01/2006	02/28/2006	<input checked="" type="checkbox"/>	03/01/2006	03/31/2006
Edit	2008	3	2007-01-01	01/01/2007	01/31/2007	<input checked="" type="checkbox"/>	02/01/2007	02/28/2007	<input checked="" type="checkbox"/>	03/01/2007	03/31/2007
Edit	2008	1	2008-01-01	01/01/2008	01/31/2008	<input type="checkbox"/>	02/01/2008	02/29/2008	<input type="checkbox"/>	03/01/2008	03/31/2008
Edit	2009	1	2009-01-01	01/01/2009	01/31/2009	<input checked="" type="checkbox"/>	02/01/2009	02/28/2009	<input checked="" type="checkbox"/>	03/01/2009	03/31/2009
Edit	2010	1	2010-01-31	01/01/2010	01/31/2010	<input type="checkbox"/>	02/01/2010	02/28/2010	<input type="checkbox"/>	03/01/2010	03/31/2010

Getting Started with Financials General Ledger

The General Ledger entry process is quick and easy.

OpenPro Bike Company - GL Entry - Mozilla Firefox

OpenPro Bike Company - GL Entry

OpenPro

Your, Adm
GL Entry

OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home

POST

Source Document: General Journal entries

Reference:

Transaction Date: 06/03/2010

Notes:

Import File: Browse... Import File

Import Format: Account No, Description, Notes, Location, Debit, Credit, Project, Sub-Pro, Task

Please select your account Location for bottom acct Set Template

Select -- choose -- -- choose -- PAINT

Location	Account No	Account Description	Notes	Debit	Credit	Pro
				0.00	0.00	
				0.00	0.00	
				0.00	0.00	
				0.00	0.00	
				0.00	0.00	
				0.00	0.00	
				0.00	0.00	
				0.00	0.00	
				0.00	0.00	
				0.00	0.00	

Total Rows: 10 Difference: 0.00 Total: 0.00 0.00

Currency/Rate: default 1 Amount: 0

5 MORE LINES POST Reverse this entry for date: 07/03/2010

Copyright©1999-2010 by OpenPro, Inc. All rights reserved.

Getting Started with Financials General Ledger

G/L forms is where you create your own financial statements and update existing records.

The screenshot displays the OpenPro software interface within a Mozilla Firefox browser window. The browser title is "OpenPro Bike Company - GL Forms - Mozilla Firefox". The page title is "OpenPro Bike Company - GL Forms". The OpenPro logo is visible in the top left and bottom right. The user is logged in as "Your, Administrator" on "06/03/2010 17:16:15". The page content includes a navigation menu on the left, a main heading "View the General Ledger Forms", a sub-heading "List General Ledger Forms", and a link "Add New General Ledger Form". A table lists existing forms with columns for Edit, Copy, Identification, Form Name, Form Title, G L Year, Delete, and Check.

Edit	Copy	Identification	Form Name	Form Title	G L Year	Delete	Check
Edit	Copy	17	Qty Profit and Loss	Demo Profit and Loss Qtrly	2007	Delete	Check
Edit	Copy	18	P&L form print monthly	Demo Monthly Form P&L	2004	Delete	Check
Edit	Copy	27	Balance Sheet	Balance Sheet Monthly	2007	Delete	Check
Edit	Copy	26	Balance Sheet Summary	Balance Sheet Summary	2007	Delete	Check
Edit	Copy	52	P&L 1-12	Demo Profit and Loss	2006	Delete	Check

Copyright©1999-2010 by OpenPro, Inc. All rights reserved.

Getting Started with Financials General Ledger

When editing the G/L Form there are multiple layouts to choose from.

OpenPro Bike Company - Mozilla Firefox

OpenPro Bike Company -

OpenPro

OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home

Change General Ledger Form

Layout Number: Qty Profit and Loss

Type of Statement: P&L

Form Title: Demo Profit and Loss Qtrly

General Ledger Year: 2007

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8
1-3	4-6	7-9	10-12	1-12	PV1-12	PPV1-12	%C5

Please select your account(s) -- choose account --

Row Code	Account Number	Account Description	Account To
Ins Del LIT		Profit and Loss Statement	
Ins Del LIT	1	1st Qtr	
Ins Del LIT	2	2nd Qtr	
Ins Del LIT	3	3rd Qtr	
Ins Del LIT	4	4th Qtr	
Ins Del LIT	5	YTD	
Ins Del LIT	6	Prior Year	
Ins Del LIT	7	2 Years Ago	
Ins Del LIT	8	% of prior year	

Getting Started with Financials General Ledger

When running financial reports you have many options including exporting the report to spreadsheet format.

The screenshot displays the OpenPro web application interface for GL Financials. The main content area includes the following options:

- Report for Year: 2008
- Department: All
- Currency: USD - Dollar
- Display Zero Balance:

The 'Prepare' button is highlighted in blue. Below these options is a table of reports:

Report	Identification	Form Name	Form Title	General Ledger Year
<input checked="" type="checkbox"/>	17	Qty Profit and Loss	Demo Profit and Loss Qtrly	2007
<input type="checkbox"/>	18	P&L form print monthly	Demo Monthly Form P&L	2004
<input type="checkbox"/>	26	Balance Sheet Summary	Balance Sheet Summary	2007
<input type="checkbox"/>	27	Balance Sheet	Balance Sheet Monthly	2007
<input type="checkbox"/>	52	P&L 1-12	Demo Profit and Loss	2006

Click the document you want to run, and then click “Prepare Report”.

Getting Started with Financials General Ledger

Once the report shows up on your screen, you have the option to print, fax or email it.

OpenPro Bike Company - rpt_glfFinancials - - Mozilla Firefox

DEMO - OpenPro Samburg Bike Company
Date: 06/03/2010 Time : 17:16:56
Currency:

Demo Profit and Loss Qtrly
Year 2008

Profit and Loss Statement

	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	YTD	Prior Year
Revenue						
Sales Account	335,428.00	2,192,635.00	197,500.00	990,995.00	3,716,558.00	636,810,759.5
Sales Labor	0.00	0.00	0.00	0.00	0.00	3,288.0
Misc Charges on Sales	0.00	0.00	0.00	0.00	0.00	111,174.6
Sales Parts	0.00	0.00	8,100,000.00	9,000,000.00	17,100,000.00	(39,537.4
Freight - shipping	6,559.00	0.00	121.00	85.00	6,765.00	46,365.0
Misc. charges on sales	0.00	0.00	(105.00)	0.00	(105.00)	(3,032.0
Less Discounts Allowed	0.00	0.00	(810,000.00)	0.00	(810,000.00)	270.5
Finance charges	0.00	0.00	0.00	0.00	0.00	(381,381.9
Inter Branch Transfer	0.00	0.00	0.00	0.00	0.00	(202,892.2
Total Revenue	341,987.00	2,192,635.00	7,487,516.00	9,991,080.00	20,013,218.00	636,340,193.0
Cost of Goods Sold						
Purchases - parts	0.00	0.00	0.00	0.00	0.00	(6,066.5
Purchase Discounts	0.00	0.00	0.00	0.00	0.00	9,990.0
Purchase rtrns & allowncs	0.00	0.00	0.00	0.00	0.00	(954.6
Cost Of Goods Sold Inventory	57,215.88	456,576.11	49,932.00	443,362.00	1,007,085.99	1,055,121.8
Inventory expenses	8,742,523.00	14,876,800.00	11,014.12	0.00	23,630,337.12	17,012,198.4
Purchase price adjustments	0.00	0.00	0.00	0.00	0.00	2,427.9
Total Cost of Goods Sold	8,799,738.88	15,333,376.11	60,946.12	443,362.00	24,637,423.11	18,072,716.9
Gross Income	(8,457,751.88)	(13,140,741.11)	7,426,569.88	9,547,718.00	(4,624,205.11)	618,267,476.0
Operating Expenses						
Laborerx027s wages	987.60	0.00	0.00	0.00	987.60	0.0
Supplemental pay expense	2,432.15	0.00	0.00	0.00	2,432.15	(11,717,157.6
FICA tax expense	1,654.41	0.00	0.00	0.00	1,654.41	0.0
SUI tax expense	250.13	0.00	0.00	0.00	250.13	0.0
FUI tax expense	1,089.58	0.00	0.00	0.00	1,089.58	0.0
Insurance expense	200.00	0.00	0.00	0.00	200.00	0.0
Advertising and promotion	0.00	0.00	0.00	0.00	0.00	(937.0

Getting Started with Financials General Ledger

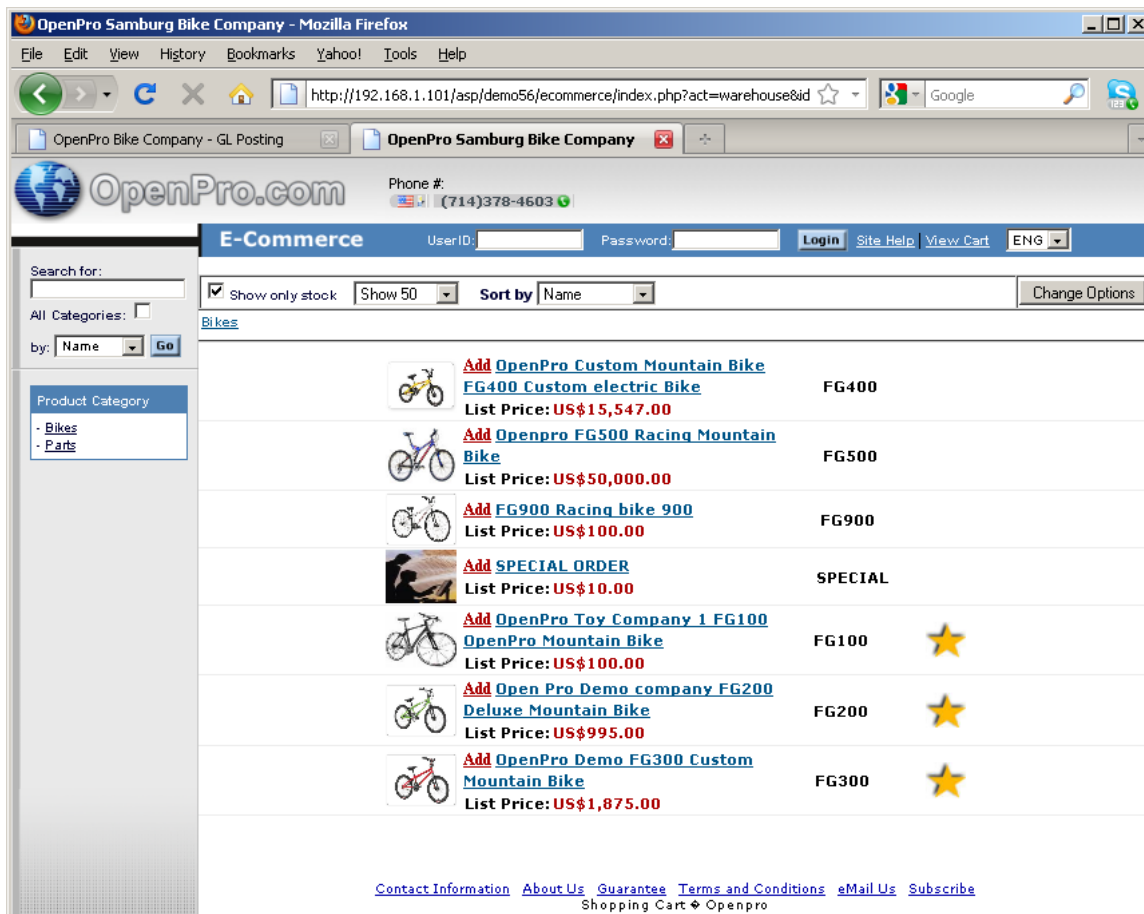
G/L Posting is where transactions from other systems come over to General Ledger to be reviewed and posted.

The screenshot shows the OpenPro GL Posting interface. The left sidebar contains a navigation menu with categories like Development, Admin, General Ledger, and Inventory Control. The main area displays a list of transactions with the following columns: Edit, Post, View, Journal, Vendor, From System, Transaction Date, No of Transaction, Location, and Notes. The transactions listed include entries for Metal Supply Company, Cocanut Oil Dist CO, and Smart Company, with various transaction types like AP VOUCHER, AR RECEIVABLE, and IC SALE.








Edit	Post	View	Journal	Vendor	From System	Transaction Date	No of Transaction	Location	Notes
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A/P	2469	Metal Supply Company / John Steel	AP VOUCHER	06/03/2010	2	DEMO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A/P	2468	Metal Supply Company / John Steel	AP VOUCHER	06/03/2010	2	DEMO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A/R	2467	Cocanut Oil Dist CO / Frank Smith	AR RECEIVABLE	06/01/2010	6	DEMO Order# 5412, Invoice# 1310
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sale	2466	Smart Company / Marty Smart	IC SALE	06/03/2010	2	DEMO 5318 line:0001
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CR	2465	Cocanut Oil Dist CO / Frank Smith	CR RECEIVABLE	06/02/2010	2	DEMO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CR	2464	Cocanut Oil Dist CO / Frank Smith	CR RECEIVABLE	06/01/2010	2	DEMO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CR	2463	Cocanut Oil Dist CO / Frank Smith	CR RECEIVABLE	06/01/2010	2	DEMO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A/R	2462	Cocanut Oil Dist CO / Frank Smith	AR RECEIVABLE	06/01/2010	5	DEMO Order# 5414, Invoice# 1309
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sale	2461	Cocanut Oil Dist CO / Frank Smith	IC SALE	06/01/2010	2	DEMO 5414 line:0001
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sale	2460	Cocanut Oil Dist CO / Frank Smith	IC SALE	06/01/2010	2	DEMO 5414 line:0002
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CR	2459	Cocanut Oil Dist CO / Frank Smith	CR RECEIVABLE	06/01/2010	2	DEMO
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	CR	2458	Cocanut Oil Dist CO / Frank Smith	CR RECEIVABLE	06/01/2010	2	DEMO Order# 5413, Invoice# 1308

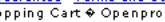
Getting Started with E-commerce

OpenPro has two different types of carts for E-Commerce. One is a stand-alone cart where you can have the cart off-site and not connected in real time. The other is connected in real-time. Below is a sample of the e-commerce cart. The first page shows all the specials for that day. This can be customized within the OpenPro package.



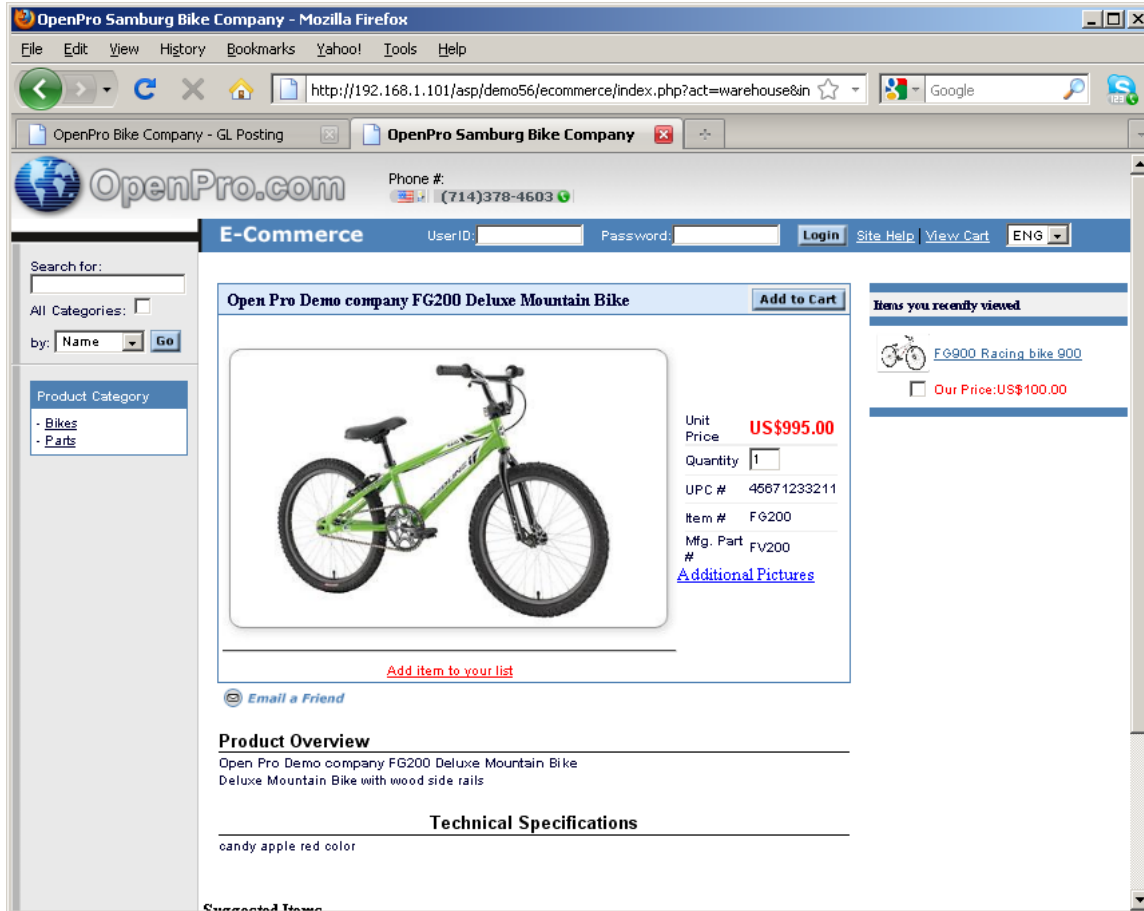
The screenshot displays the OpenPro Samburg Bike Company website in a Mozilla Firefox browser. The page features a navigation bar with 'E-Commerce', 'Login', 'Site Help', and 'View Cart' options. A search bar is present, along with filters for 'Show only stock' and 'Sort by Name'. The main content area lists several bicycle models with their respective prices and 'Add' buttons. The footer contains contact information and a shopping cart icon.

Product Image	Product Name	Model	List Price	Specials
	Add OpenPro Custom Mountain Bike FG400 Custom electric Bike	FG400	US\$15,547.00	
	Add Openpro FG500 Racing Mountain Bike	FG500	US\$50,000.00	
	Add FG900 Racing bike 900	FG900	US\$100.00	
	Add SPECIAL ORDER	SPECIAL	US\$10.00	
	Add OpenPro Toy Company 1 FG100 OpenPro Mountain Bike	FG100	US\$100.00	★
	Add Open Pro Demo company FG200 Deluxe Mountain Bike	FG200	US\$995.00	★
	Add OpenPro Demo FG300 Custom Mountain Bike	FG300	US\$1,875.00	★

[Contact Information](#) [About Us](#) [Guarantee](#) [Terms and Conditions](#) [eMail Us](#) [Subscribe](#)
Shopping Cart 

Getting Started with E-commerce

By clicking on the product, the system shows the details of that product.



The screenshot shows a web browser window titled "OpenPro Samburg Bike Company - Mozilla Firefox". The address bar displays the URL: `http://192.168.1.101/asp/demo56/ecommerce/index.php?act=warehouse&in`. The browser tabs include "OpenPro Bike Company - GL Posting" and "OpenPro Samburg Bike Company".

The website header features the "OpenPro.com" logo, a phone number "(714)378-4603", and a navigation bar with "E-Commerce", "UserID:", "Password:", "Login", "Site Help", "View Cart", and "ENG" (language selector).

The main content area displays the product "Open Pro Demo company FG200 Deluxe Mountain Bike" with an "Add to Cart" button. A large image of the green and black mountain bike is shown. To the right of the image, the following details are listed:

- Unit Price: **US\$995.00**
- Quantity:
- UPC #: 46671233211
- Item #: FG200
- Mfg. Part #: FV200
- [Additional Pictures](#)

Below the image is a red link: "Add item to your list".

On the right side of the page, there is a section titled "Items you recently viewed" with a link to "FG900 Racing bike 900" and a price of "Our Price: US\$100.00".

The left sidebar contains a search bar, "All Categories:" with a checkbox, and a "Product Category" menu with options for "Bikes" and "Parts".

Below the product image, there is an "Email a Friend" link, a "Product Overview" section with the text "Open Pro Demo company FG200 Deluxe Mountain Bike Deluxe Mountain Bike with wood side rails", and a "Technical Specifications" section with the text "candy apple red color".

Getting Started with E-commerce

When you “Add to Cart” and “View Cart” it displays what is purchased.

The screenshot shows a web browser window titled "OpenPro Samburg Bike Company - Mozilla Firefox". The address bar shows the URL: <http://192.168.1.101/asp/demo56/ecommerce/index.php?act=viewcart&sess>. The browser tabs include "OpenPro Bike Company - GL Posting" and "OpenPro Samburg Bike Company".

The website header features the "OpenPro.com" logo, a phone number "(714)378-4603", and navigation links for "E-Commerce", "User ID", "Password", "Login", "Site Help", "View Cart", and "ENG".

On the left side, there is a search bar and a "Product Category" menu with options for "Bikes" and "Parts".

The main content area is titled "My Cart" and displays a table of "Selected Item":

Item Name	Item #	Quantity	Cost per Unit	Total Cost
<input checked="" type="checkbox"/> FG200 Deluxe Mountain Bike	FG200	<input type="text" value="1"/>	US\$995.00	US\$995.00

Below the table, there are buttons for "Update Cart", "Check Out", "Continue Shopping", and "Make a Donation". A "Shipping" dropdown menu is set to "Next Date Next Day Air - US\$52.00".

There are input fields for "Promotion Code" and "Donation Amount" (set to 25). A note states: "Please Note: Promotion Code will be applied only once you click 'Check Out'".

On the right side, a "Your Amount" summary is shown:

Product Cost:	US\$995.00
Shipping Total:	US\$52.00
Tax:	US\$0.00
Total:	US\$1,047.00

At the bottom, there are links for "Contact Information", "About Us", "Guarantee", "Terms and Conditions", "eMail Us", and "Subscribe". The footer text reads "Shopping Cart Openpro".

Getting Started with E-commerce

Here is an updated view of the purchase:

The screenshot shows a Microsoft Internet Explorer browser window displaying the OpenPro.com website. The page is titled "Verify Cart" and features a navigation bar with "E-Commerce", "Login", "Site Help", and "View Cart" options. A search bar is located on the left side. The main content area displays a table of selected items, a "Your Amount" summary, and a confirmation prompt.

OpenPro.com Phone # (714)378-4603

E-Commerce UserID: _____ Password: _____ **Login** [Site Help](#) [View Cart](#)

Search for: _____
by: Name

Product Category
- Wagons

Verify Cart

Selected Item				
Item Name	SKU	Quantity	Cost per Unit	Total Cost
FG100 OpenPro Red Wagon	FG100	2	\$100.00	\$200.00

Customer Pickup Pickup - \$0.00

Your Amount	
Product Cost:	\$200.00
Shipping Total:	\$0.00
Tax:	\$15.00
Total:	\$215.00

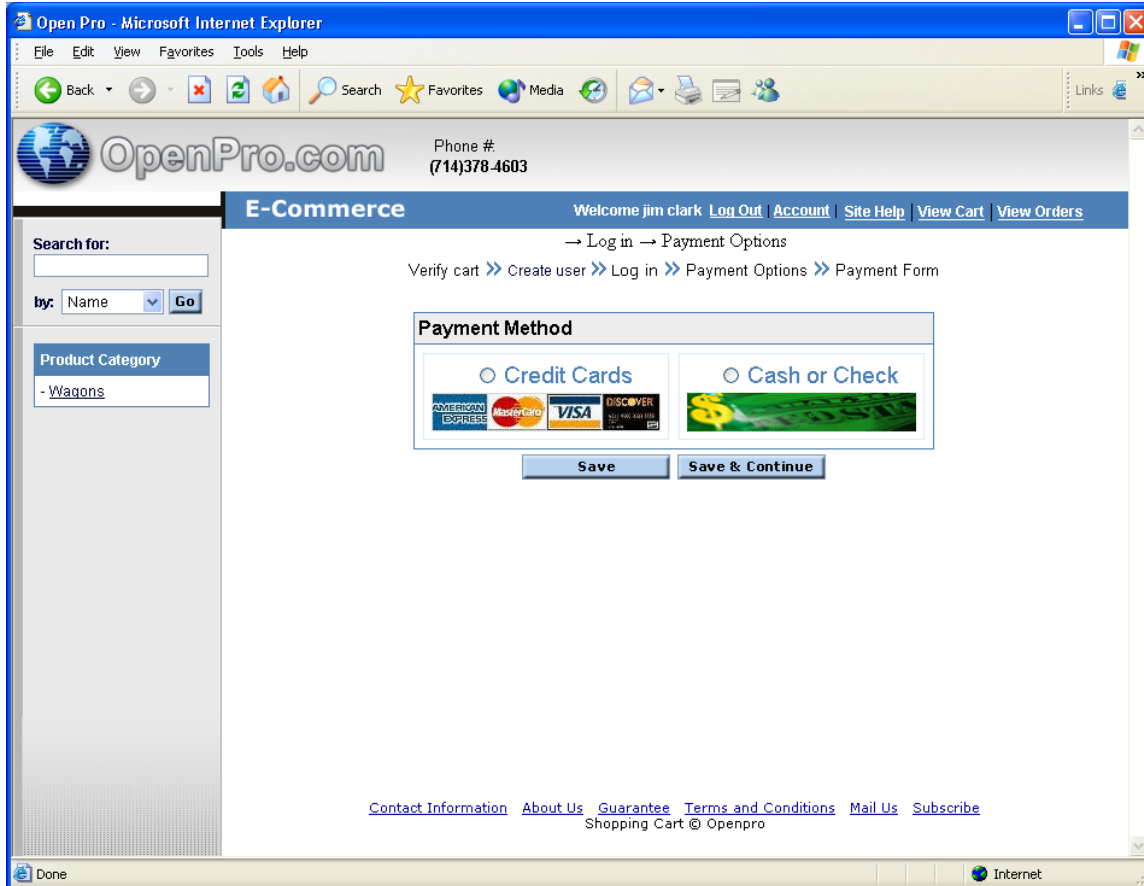
Is this information Correct?

[Contact Information](#) [About Us](#) [Guarantee](#) [Terms and Conditions](#) [Mail Us](#) [Subscribe](#)
Shopping Cart © Openpro

Done Internet

Getting Started with E-commerce

The OpenPro system can handle many different payment methods.



Getting Started with E-commerce

The OpenPro ERP system is where you finish the back end of the cart, shipping, setup of managed specials, and more.

The screenshot shows the OpenPro ERP system interface in a Mozilla Firefox browser window. The browser address bar displays the URL: `http://192.168.1.101/asp/demo56/frames.php`. The page title is "OpenPro Bike Company - E-Com Orders - Mozilla Firefox".

The interface features a navigation menu on the left side with the following items:

- Development
- Admin
- Assist Import
- Bank Reconciliation
- CMMS Machines
- Contacts (CRM)
- Document Imaging
- Ecommerce
 - Maintenance
 - E-Com Orders
 - Specials
- Executive Dashboard
- Fixed Asset
- General Ledger
- Inventory Control
- Job Costing
- Manufacturing (ERP)
- Payables
- Payroll
- Point Of Sale
- PR Time Cards
- Purchase Order
- Receivables
- Rules Setup
- Sales Orders
- Tech Knowledge
- Warranty Service
- Work Flows

At the bottom of the navigation menu, there is an "Enable Autohide" option.

The main content area displays the "OpenPro" logo and the text "OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home". Below this, there is a section titled "Selected Invoices/Quotes" containing a table with the following data:

Name	Company	Company ID	Location	Pay Method	Quote Number	Order Number	Invoice Number	Amount	Order Date	Order Type
Mathers, Harry	Computer Bike Services LLC	458HR	DEMO	mail	4779	4779	0	142.00	03/06/2007	E-Commer
Mathers, Harry	Computer Bike Services LLC	458HR	DEMO		4837	4837	0	127.00	08/17/2007	E-Commer
Smith, Harry	OpenPro demo customer	23	DEMO	mail	4783	4783	0	142.00	03/22/2007	E-Commer
Smith, Harry	OpenPro demo customer	23	DEMO	mail	4780	4780	0	142.00	03/07/2007	E-Commer
Smith, Harry	OpenPro demo customer	23	DEMO	mail	4796	4796	0	149.50	05/04/2007	E-Commer
Smith, Harry	OpenPro demo customer	23	DEMO		4909	4909	0	133.37	11/21/2007	E-Commer
Smith, Harry	OpenPro demo customer	23	DEMO		4805	4805	0	2077.62	06/12/2007	E-Commer
Smith, Harry	OpenPro demo customer	23	DEMO	mail	4808	4808	0	149.50	06/16/2007	E-Commer
Smith, Harry	OpenPro demo customer	23	DEMO	mail	4816	4816	0	149.50	06/29/2007	E-Commer
Smith,	OpenPro demo	23	DEMO	mail	4819	4819	0	133.37	07/12/2007	E-Commer

Getting Started with Customer Relationship Management CRM

OpenPro ERP has a built in CRM package that is integrated with all aspects of the business. First, it has a built in calendar for scheduling meetings, office events and more.

The calendar can also be used for Service Billing.

The image displays two screenshots of the OpenPro CRM interface. The top screenshot shows the 'Contacts (CRM) Shortcuts' menu, which includes options for Reports, Entities, Projects, Calendar, Quotes, Incidents, Groups, and Forms. The bottom screenshot shows the 'Calendar - All' view for June 2010, featuring a calendar grid with scheduled events.

Calendar - All

Sun	Mon	Tue	Wed	Thur	Fri	Sat
		1	2	3	4	5
6	7 Visit customer for service (12:00PM - 12:00PM) Admin (1)	8	9 Visit new customer (12:00PM - 12:00PM) Admin (1)	10	11	12
13	14	15 Visit new customer (12:00PM - 12:00PM) Admin (1)	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Copyright©1999-2010 by OpenPro, Inc. All rights reserved.

Getting Started with Customer Relationship Management CRM

“Leads Search” is where you keep track of your leads. Leads can be searched by many different methods.

OpenPro Bike Company - Contacts Search - Mozilla Firefox

File Edit View History Bookmarks Yahoo! Tools Help

http://192.168.1.101/asp/demo56/frames.php

OpenPro Bike Company - Contact... OpenPro Samburg Bike Company

OpenPro

Your, Administrator 06/03/2010 17:26:1

OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home Contacts Search

Find Lead

[Enter a new lead HERE](#)

Last Name |

First Name led

Address Lane

Company

E-Mail Address

Zip Code

Country

Customer Ref. #

Social Security #

Phone Number

Fax Number

Lead Source - choose -

Sales Group Choose

Followup Date

Followup Date choose

Selection

Status Flag - All -

State Code

Entry Date Min

Entry Date Max

Industry 1 Min Max

Industry 2 Min Max

Fast Search

Include All People

Sort Last name

Direction Ascending

Show Email

Show last updated

Userdef 1

Userdef 2

Userdef 3

of employees: Min Max

Revenue: Min Max

Facility Size: Min Max

dunns #

Stock Symbol

Search

OpenPro

Copyright@1999-2010 by OpenPro, Inc. All rights reserved.

Getting Started with Customer Relationship Management CRM

Once you narrow down the search method you can sort the list any way you want. Select the contact via the “Edit” button. This option allows you to process mass emails from this lead search screen. The lead search screen makes a great list for telemarketing purposes.

OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home

Selected Leads

Contact Name	Title	Company	Phone	Email	State	Zip	Followup Date	Status	Lik'hd	Sls Size	Lead S
Last, First		Alpha Enterprises	(213)444-5678	x432 jh@stillalive.com					6	543.00	P
Lopez, Jennifer Actor1	Jennifer Lopez		(714)555-1234	jlo@openpro.com	CA	90210	12/31/2006	Good	7	10000.00	AC

2 leads found

[New Search](#) [Revise Search](#)

Copyright©1999-2010 by OpenPro, Inc. All rights reserved.

Getting Started with Customer Relationship Management CRM

After selecting the “edit” button, a new window pops up displaying the contact details. This example shows that you can have multiple contacts per customer. If you click on the “detail” button, all the user-defined fields will be displayed below. Date and time stamp notes can be entered in for this contact.

OpenPro Bike Company - leads_maint -- Mozilla Firefox
 http://192.168.1.101/asp/demo56/index.php?act=leads_maint&noheaders=true&edit=Edit&customerid=475

Edit Prospect

Rep: _____ Last Access: 101 - Administrator Your 04/20/2007 Ref #: 475

Company Information:

Customer: Cocanut Oil Dist CO [View Customer](#)

Vendor: Metal Fab company [View Vendor](#)

Phone: 7145551234

Company: Jennifer Lopez

Address: 123 rich people only street

City, State: Hollywood CALIFORNIA

Zip: 90210

Country: USA www.jenniferlopez.com/

Fax Number: 5621234567

Sale Likelihood: 7 10000.00 573609 731916

Sales Group: Open Pro

Lead Source: ADD - choose - Good

Followup Notes 12/31/200

Name	Title	Phone	Email	Edit
Jennifer Lopez	Actor1	(714)555-1212	jlo@openpro.com	<input type="button" value="EMAIL"/> <input type="button" value="EDIT"/>
Joe Manager	Manager of lopez	(714)555-1239		<input type="button" value="EDIT"/>
Mike Manager		(714)555-1234	Mike	<input type="button" value="EMAIL"/> <input type="button" value="EDIT"/>

detail notes for this contact

CONTACT-MENU

Getting Started with Customer Relationship Management CRM

Here is an example of the user-defined fields on the bottom of the screen:

The screenshot displays the OpenPro CRM interface for a contact record. The browser window title is "OpenPro Bike Company - leads_maint -- Mozilla Firefox". The URL is "http://192.168.1.101/asp/demo56/index.php?act=leads_maint&noheaders=true&edit=Edit&customerid=475#".

Contact Information:

- Country: USA
- Web Site URL: www.jenniferopez.com/
- Fax Number: 5621234567
- Mass Fax:
- Sale Likelihood: 7
- Prospective Sales: \$10000.00
- Ind. 1: 573609
- Ind. 2: 731916
- Sales Group: Open Pro
- Lead Source: ADD
- Status Flag: Good
- Followup Date: 12/31/200

Contact List:

Name	Title	Phone	Email	Edit
Jennifer Lopez	Actor1	(714)555-1212	jlo@openpro.com	EDIT
Joe Manager	Manager of lopez	(714)555-1239		EDIT
Mike Manager		(714)555-1234	Mike	EDIT

Notes: detail notes for this contact

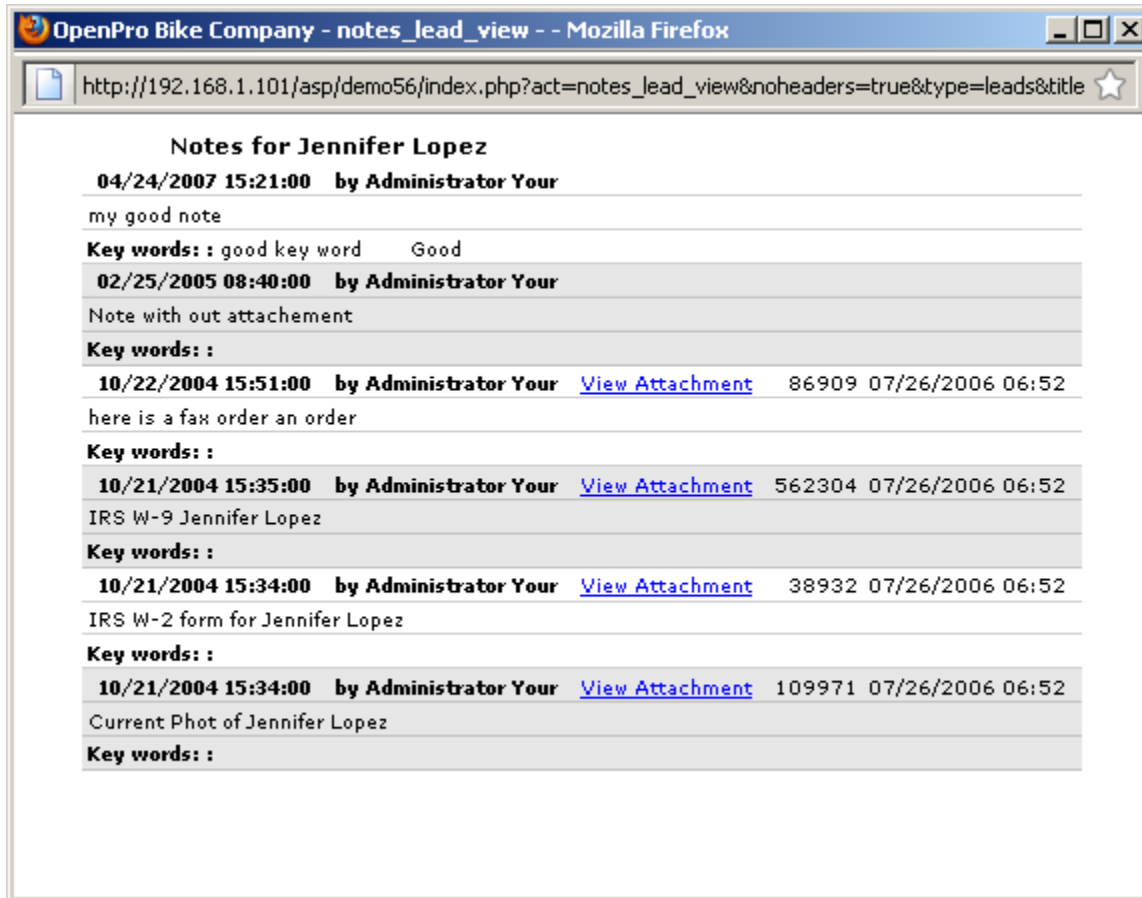
User-Defined Fields (UD1, UD2):

# of employees	0.000	Revenue	0.000
Facility Size	0.000	dunns #	
Stock Symbol		Customer Type	
Tax Id #		SIC Code	
Business Type		Credit	
Branch		Ownership	
Primary Code		Sales (appx)	
Sales Annual (range)		# Employees (appx)	0
# Employees (range)			
Ecommerce	<input type="checkbox"/>	UD1	
UD1		UD2	
Plays Golf			

Buttons: ADD PERSON, HIDE PERSON, DOCUMENT, HIDE DETAIL, COMMERCIAL, SAVE

Getting Started with Customer Relationship Management CRM

Here is an example of the notes:



The screenshot shows a Mozilla Firefox browser window titled "OpenPro Bike Company - notes_lead_view". The address bar contains the URL: http://192.168.1.101/asp/demo56/index.php?act=notes_lead_view&noheaders=true&type=leads&title. The main content area is titled "Notes for Jennifer Lopez" and displays a list of notes with their respective dates, times, authors, and descriptions. Each note entry includes a "Key words:" field and a "View Attachment" link.

Date	Time	Author	Description	Attachment	Lead ID	Created
04/24/2007	15:21:00	Administrator Your	my good note			
02/25/2005	08:40:00	Administrator Your	Note with out attachement			
10/22/2004	15:51:00	Administrator Your	here is a fax order an order	View Attachment	86909	07/26/2006 06:52
10/21/2004	15:35:00	Administrator Your	IRS W-9 Jennifer Lopez	View Attachment	562304	07/26/2006 06:52
10/21/2004	15:34:00	Administrator Your	IRS W-2 form for Jennifer Lopez	View Attachment	38932	07/26/2006 06:52
10/21/2004	15:34:00	Administrator Your	Current Phot of Jennifer Lopez	View Attachment	109971	07/26/2006 06:52


Getting Started with Check Reconciliation

Check Reconciliation is based up on the cash account setup in General Ledger. To run a balance to the statement, click on “Balance”, or you can choose to run the Report option.



Getting Started with Check Reconciliation

This is the Balance Process for your checkbook:



The screenshot shows the OpenPro web application interface. The browser window title is "OpenPro Bike Company - Cash Acct - Mozilla Firefox". The page header includes the OpenPro logo, the user name "Your, Administrator", the date and time "06/03/2010 17:28:24", and navigation links: "OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home Cash Acct".

The main content area is titled "List GL checking" and includes a link "Add New GL Checking". Below this is a table with the following data:

Edit	Cash Code	Description	Bank Name	Balance Statement	Report Past Balances	Delete
Edit	Cash1	First National Bank	First National Bank payroll	Balance	Report	Delete
Edit	Cash2	Default National Payroll	Best National Bank payroll	Balance	Report	Delete
Edit	cash4	cash	cash555	Balance	Report	Delete

Getting Started with Check Reconciliation

This is the Report process:

OpenPro Bike Company -- Mozilla Firefox

File Edit View History Bookmarks Yahoo! Tools Help

OpenPro Bike Company -

OpenPro Your, Administrator 06/03/2010 17:28:3

OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home

First National Bank payroll Statement Balance

Bank Contact Mike Block (Controller) (909)898-7334

Account First National Bank (12345677)

1 USD = 1.6 CAD CAD - CA\$

Last Reconciliation Balance (as of 06/01/2010) 0.00

<input type="checkbox"/> Use Item	Type	Check # CR #	Date	Amount
<input type="checkbox"/>	Cash Receipt	483	07/09/2008	12,700,800.00
<input type="checkbox"/>	Cash Receipt	484	09/09/2008	170,208.00
<input type="checkbox"/>	Cash Receipt	485	11/11/2008	15,552,000.00
<input type="checkbox"/>	Cash Receipt	486	12/23/2008	1,710,720.00
<input type="checkbox"/>	Cash Receipt	488	01/22/2009	1,727,827.20
<input type="checkbox"/>	Cash Receipt	489	02/09/2009	1,727,982.72
<input type="checkbox"/>	Cash Receipt	527	06/01/2010	160.00
<input type="checkbox"/>	Check	15660	06/13/2008	-1,601.58
<input type="checkbox"/>	Check	15664	06/13/2008	-14,400,000.00
<input type="checkbox"/>	Check	15666	07/29/2008	-14.40
<input type="checkbox"/>	Deposit	103	06/19/2008	11,508.56
<input type="checkbox"/>	Deposit	105	06/20/2008	45,438,892.14
<input type="checkbox"/>	Deposit	107	06/20/2008	73.60
<input type="checkbox"/>	Deposit	116	05/26/2010	80.00
<input type="checkbox"/>	Deposit	117	05/26/2010	1,710.72
<input type="checkbox"/>	Deposit	122	05/27/2010	177,777.60
<input type="checkbox"/>	Deposit	77	02/27/2006	2,444,742,009.81

Getting Started with Service Billing

Service Billing is based upon a calendar schedule.

The screenshot shows the OpenPro software interface in a Mozilla Firefox browser window. The title bar reads "OpenPro Bike Company - Calendar - All - Mozilla Firefox". The browser's address bar shows "OpenPro Bike Company - Calendar - All". The main content area displays a calendar for June 2010. The calendar is titled "June 2010" and includes a "Sort by Start Time" dropdown menu and a "View All" button. The calendar grid shows the following events:

Sun	Mon	Tue	Wed	Thur	Fri	Sat
		1	2	3	4	5
6	7 visit customer for service (12:00AM- 12:00PM) admin (1)	8	9 visit new customer (12:00AM- 12:00PM) admin (1)	10	11	12
13	14	15 visit new customer (12:00AM- 12:00PM) admin (1)	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

The sidebar on the left contains a navigation menu with the following items: Development, Admin, Assist Import, Bank Reconciliation, CMMS Machines, Contacts (CRM), CONTACT-MENU, CRM Projects, Maintenance, Reports, Work Flow Detail, Calendar - All (selected), Calendar One, Contacts Search, Contacts Search La, Lead Quote View, SIC codes, Document Imaging, Ecommerce, Executive Dashboar, Fixed Asset, General Ledger, Inventory Control, Job Costing, Manufacturing (ERP), Payables, Payroll, Point Of Sale, PR Time Cards, Purchase Order, Receivables, Rules Setup, Sales Orders, Tech Knowledge, Warranty Service, and Work Flows. The footer of the interface reads "Copyright@1999-2010 by OpenPro, Inc. All rights reserved." and includes the OpenPro logo.

Getting Started with Service Billing

Detail calendar schedules can be entered in, processed and billed for.

The screenshot displays a web application window titled "phpEventCalendar: Event Display - Micr...". The main content area shows the date "July 9, 2004" and the day "Friday". Below this, there are four event entries, each with a title bar, a description, customer information, location, company, and a "Billed" status with "edit" and "delete" links.

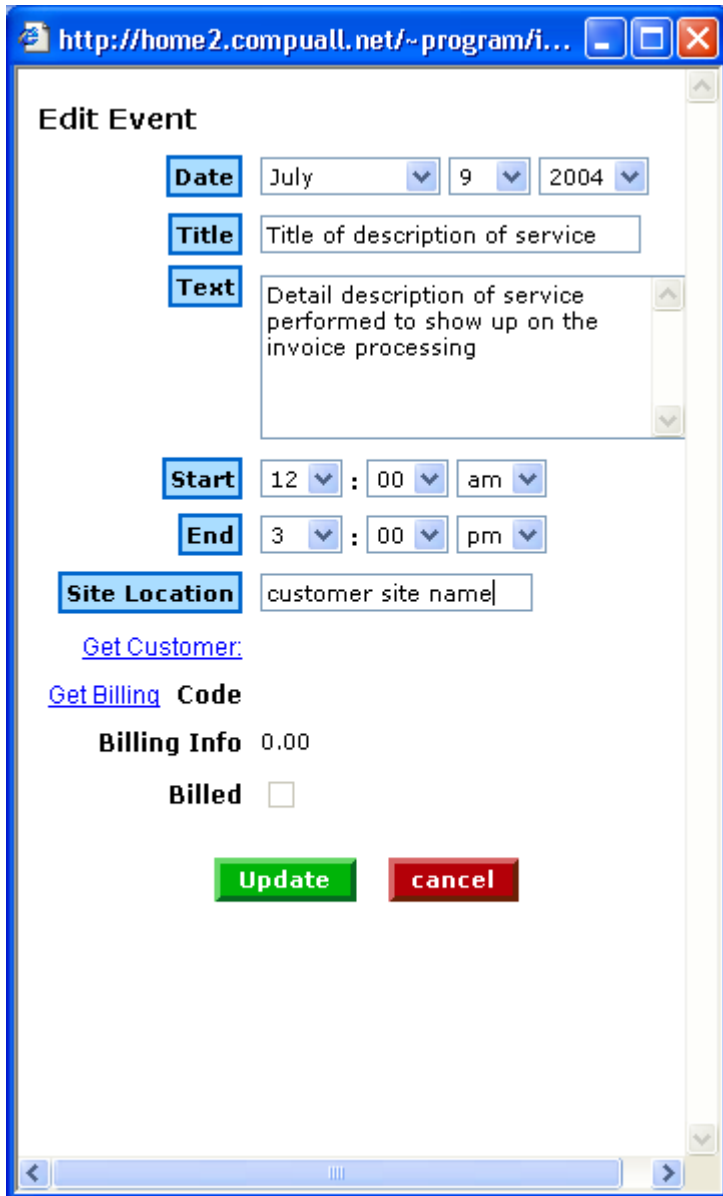
Event Title	Time
2econd entry	12:00AM - 4:00AM
fourth	12:00AM - 4:00AM
sixth	No Time Specified
sadf	12:00AM - 3:00PM

Each event entry includes the following details:

- Description: A line of placeholder text (e.g., "sdfasdf", "aSDASD", "sdfasdf sfgasdfg wtr", "asdfasdf").
- Customer: A name with a blue link (e.g., "bilbo baggins", "Jim Clark", "John Smith JR").
- Location: A name (e.g., "Location:", "AsdaSD", "sdfasdf", "sdfasdf").
- Company: A name (e.g., "Company:", "Smith Carts Inc.", "Company:").
- Posted by: "Administrator Your".
- Billed: "Yes" or "No".
- Links: "[edit]" and "[delete]".

Getting Started with Service Billing

When scheduling a customer service call, you can enter in a detailed description of the services performed. Within the dialog box, you can select the customer and the billing code or rate code, the scheduled date and time, and the person performing the service.



The screenshot shows a web browser window with the address bar displaying `http://home2.compuall.net/~program/i...`. The main content area is titled "Edit Event" and contains the following form elements:

- Date:** Three dropdown menus showing "July", "9", and "2004".
- Title:** A text input field containing "Title of description of service".
- Text:** A text area containing "Detail description of service performed to show up on the invoice processing".
- Start:** Three dropdown menus showing "12", ":", and "00", followed by "am".
- End:** Three dropdown menus showing "3", ":", and "00", followed by "pm".
- Site Location:** A text input field containing "customer site name".
- Get Customer:** A blue hyperlink.
- Get Billing Code:** A blue hyperlink.
- Billing Info:** The text "0.00".
- Billed:** A checkbox that is currently unchecked.
- Buttons:** A green "Update" button and a red "cancel" button.

Getting Started with Service Billing

After the customer information and billing information is entered into the system, the option of printing out an on-site sheet or labor work order will appear.

The screenshot shows a web browser window with the address bar displaying `http://home2.compuall.net/~program/i...`. The main content area is titled "Edit Event" and contains the following form elements:

- Date:** Three dropdown menus showing "July", "9", and "2004".
- Title:** A text input field containing "Title of description of service".
- Text:** A text area containing "Detail description of service performed to show up on the invoice processing".
- Start:** Three dropdown menus showing "12", "00", and "am".
- End:** Three dropdown menus showing "3", "00", and "pm".
- Site Location:** A text input field containing "customer site name".
- Get Customer:** A link labeled "Get Customer:" followed by the text "Jim Clark".
- Get Billing Code:** A link labeled "Get Billing Code" followed by the text "mgr01".
- Billing Info:** The text "95.00 Manager Normal".
- Billed:** A checkbox that is currently unchecked.
- Buttons:** Three buttons at the bottom: a green "Update" button, a red "cancel" button, and a yellow "Labor Quote" button.


Getting Started with Service Billing

Here is an example of the Labor Work Order:



The screenshot shows a web browser window with the following content:

OPENPRO.COM

 DEMO
OpenPro Demo Store
10061 Talbert Ave
Fountain Valley, CA 92708
(714)378-4603

Labor Work Order

Customer Reference: 5
Clark, Jim
10061 Talbert Ave
Fountain Valley, CA 92708
(714)378-4600

Date 07/09/2004, from 00:00 am to 3:00 pm

Quantity 15.00 hours

Event Title of description of service

Description Detail description of service performed to show up on the invoice processing

Rate \$95.00 [mgr01 Manager Normal]

Total Due \$1,425.00

Getting Started with Service Billing

At the end of the day, in Sales Order Processing, you can generate billing from the service records performed. This will generate invoices to send out to clients.

The screenshot shows the OpenPro software interface in a Mozilla Firefox browser window. The title bar reads "OpenPro Bike Company - Process Services - Mozilla Firefox". The browser's address bar shows "OpenPro Bike Company - Process Se...". The main content area features the "OpenPro" logo and the text "Your, Administrator 06/03/2010 17:29:48". Below this, the text "OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home" is displayed, followed by "Process Services".

The "Process Billables For" section includes the following fields and controls:

- Start Date**: A text input field.
- End Date**: A text input field.
- Order Type**: A dropdown menu currently set to "Phone Order".
- Process all Representatives**
- Submit Processing**: A button.
- Find Reps**: A button.

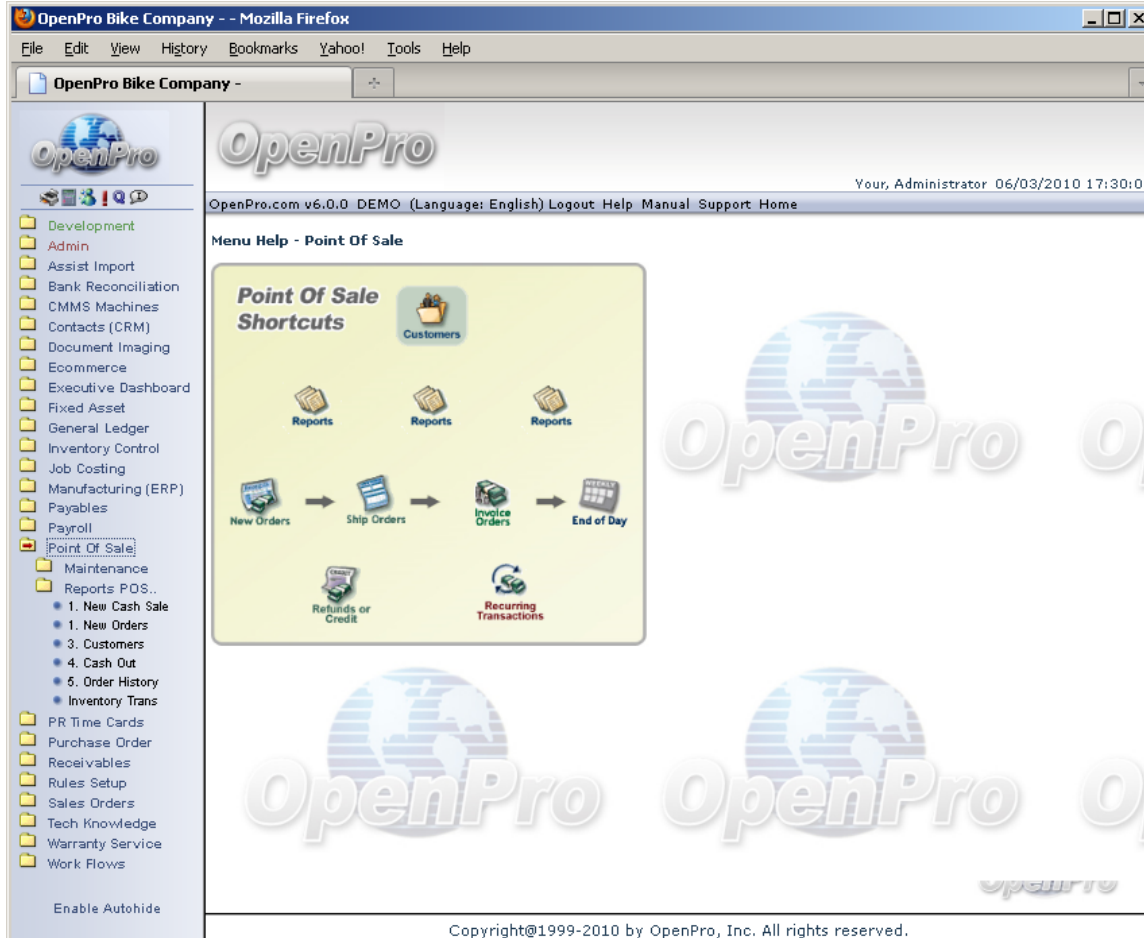
The "Chosen Representatives" section contains a table with the following structure:

Rem	Rep Num	Rem	Rep Num	Rem	Rep Num
<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>	<input type="radio"/>	<input type="text"/>

The footer of the interface displays "Copyright@1999-2010 by OpenPro, Inc. All rights reserved." and the OpenPro logo.

Getting Started with Point of Sale

OpenPro ERP Point of Sale is designed for ease of use. OpenPro Point of Sale manages your Sales, Inventory, Orders and Cash. Log in to the Point of Sale system, and click on “New Orders”. If the employee did not cash out the prior day you will get an error message stating so. The entry process is very simple like a shopping cart. OpenPro is integrated with cash drawers, display polls, bar code readers and other point of sale terminals.



Getting Started with Point of Sale

We have quick entry for walk-in customers and detail information for full customers.

The screenshot displays the OpenPro software interface for a 'New Cash Sale'. The browser window title is 'OpenPro Bike Company - 1. New Cash Sale - Mozilla Firefox'. The main header shows 'OpenPro' and the user 'Your, Administrator' with a timestamp of '06/03/2010 17:30:23'. The interface includes a navigation menu on the left with categories like 'Development', 'Admin', and 'Point Of Sale'. The main content area shows a table with one item: 'EG100 OpenPro Mountain Bike' with a quantity of 1 and a unit price of 90.00000. Below the table, there are fields for 'Discount Amount' (0.00), 'Shipping' (UPS - Customer Pickup Pickup - 0.00), and 'Tax Code' (CAOR - CALIFORNIA ORANGE COUNTY). The 'Grand Total' is displayed as US\$97.20. The footer contains the copyright notice: 'Copyright@1999-2010 by OpenPro, Inc. All rights reserved.'

Getting Started with Point of Sale

Select “New Order” for an existing customer.

The screenshot displays the OpenPro software interface in a Mozilla Firefox browser window. The title bar reads "OpenPro Bike Company - 1. New Cash Sale - Mozilla Firefox". The browser's address bar shows "OpenPro Bike Company - 1. New Cas...".

The main interface features a navigation menu on the left with categories such as Development, Admin, Assist Import, Bank Reconciliation, CMMS Machines, Contacts (CRM), Document Imaging, Ecommerce, Executive Dashboard, Fixed Asset, General Ledger, Inventory Control, Job Costing, Manufacturing (ERP), Payables, Payroll, Point Of Sale, Maintenance, Reports P.O.S., and Work Flows. The "Point Of Sale" category is expanded, showing sub-items like "1. New Cash Sale", "1. New Orders", "3. Customers", "4. Cash Out", "5. Order History", and "Inventory Trans".

The main content area displays the "OpenPro" logo and the text "Your, Administrator 06/03/2010 17:30:23". Below this, it shows "OpenPro.com v6.0.0 DEMO (Language: English) Logout Help Manual Support Home" and "1. New Cash Sale".

The order details section includes:

- Store: 6 Mr. Smith, Frank DD
- Quote: 5418
- Phone Order
- Entered By: Administrator Your
- Date: June 3, 2010 5:30 PM
- Location: Coconut Oil Dist CO Fountain Valley, CT

A table lists the items in the order:

Keep	Line Item	Type	Item Name	Part #	Quantity	Details	Discount	Unit Price	Total Price
<input checked="" type="checkbox"/>	0001	New	FG100 OpenPro Mountain Bike	FG100	1		0	90.00000	90.00

Below the table, there are buttons for "update", "Place Order", and "Invoice Order". A "Discount Amount" field is set to 0.00, and a "Total" field is set to 90.00. There is an "Override Discount Amount" checkbox which is unchecked.

Shipping and Tax information:

- Shipping: UPS - Customer Pickup Pickup - 0.00 (Total: 0.00)
- Tax Code: CAOR - CALIFORNIA ORANGE COUNTY (Total: 7.20)

Summary: Total Weight: 6, Rebate: 0.00, Grand Total: US\$97.20

At the bottom, there are fields for "Quick Add", "Input Part #", and "Input Serial".

Additional controls include a "Show only stock" checkbox, a "Show 20" dropdown, and a "Sort By: Name" dropdown. There are also buttons for "Change Options", "Search", "MATRIX", "IMPORT CSV", and "ADVANCED SEARCH".

Links for "Bike Options", "Bikes", "Parts", "Ramps", and "Services" are provided. The OpenPro logo is visible in the bottom right corner, and the copyright notice "Copyright@1999-2010 by OpenPro, Inc. All rights reserved." is at the very bottom.

Getting Started with Point of Sale

Scan or select the item from the list. When done, click on “Place Order and Pay”.

The screenshot displays the OpenPro software interface in a Mozilla Firefox browser window. The title bar reads "OpenPro Bike Company - 1. New Cash Sale - Mozilla Firefox". The browser's address bar shows "OpenPro Bike Company - 1. New Cas...".

The main interface features a navigation menu on the left with categories such as Development, Admin, Assist Import, Bank Reconciliation, CMMS Machines, Contacts (CRM), Document Imaging, Ecommerce, Executive Dashboard, Fixed Asset, General Ledger, Inventory Control, Job Costing, Manufacturing (ERP), Payables, Payroll, Point Of Sale, Maintenance, Reports P.D.S., and Work Flows. The "Point Of Sale" category is currently selected.

The main content area displays the "OpenPro" logo and the user's name "Your, Administrator" with the date and time "06/03/2010 17:30:23". Below this, the software version "OpenPro.com v6.0.0 DEMO (Language: English)" and navigation links "Logout Help Manual Support Home" are visible. The current screen is titled "1. New Cash Sale".

Key information displayed includes:

- Store: 6 Mr. Smith, Frank DD
- Quote: 5418
- Phone Order
- Entered By: Administrator Your
- Date: June 3, 2010 5:30 PM

A table lists the items for sale:

Keep	Line Item	Type	Item Name	Part #	Quantity	Details	Discount	Unit Price	Total Price
<input checked="" type="checkbox"/>	0001	New	FG100 OpenPro Mountain Bike	FG100	1		0	90.00000	90.00

Below the table, there are buttons for "update", "Place Order", and "Invoice Order". A "Discount Amount" field is set to 0.00, and the "Total" is 90.00. There is an "Override Discount Amount" checkbox which is unchecked.

Shipping information is shown as "Shipping: UPS - Customer Pickup Pickup - 0.00" with a total of 0.00. The "Tax Code" is "CAOR - CALIFORNIA ORANGE COUNTY" with a rate of 7.20. The "Total Weight" is 6, "Rebate" is 0.00, and the "Grand Total" is US\$97.20.

At the bottom of the main area, there are "Quick Add" and "Input Part #" fields, and an "Input Serial" button. Below this is a search section with "Show only stock" checked, "Show 20" items, and "Sort By: Name". There are also buttons for "MATRIX", "IMPORT CSV", and "ADVANCED SEARCH".

The footer of the page includes the OpenPro logo and the copyright notice: "Copyright@1999-2010 by OpenPro, Inc. All rights reserved."

Getting Started with Point of Sale

Open Pro handles multiple payment types, including store credit, debit cards, etc. Enter in the dollar amount and click “Check Out”.

The screenshot shows the OpenPro software interface in a Mozilla Firefox browser window. The browser title is "OpenPro Bike Company - - Mozilla Firefox". The page title is "OpenPro". The user is logged in as "Your, Administrator" on "06/03/2010 17:30:45".

The main content area displays the "Payment Designation Page" for a customer named "Cocanut Oil Dist CO Frank Smith". The order number is 5418, and the total amount to pay is US\$97.20. The page lists various payment methods with input fields for amounts and check numbers:

- Purchase Order #
- Reference
- Payment Method (amount):
 - Cash
 - American Express
 - Rebate
 - Check
 - Check #
 - Visa Credit Card
 - Master Card
 - Discover Card
 - payable net 30: 97.2
 - Check #
 - Paypal
 - E-Commerce Payment
 - Cash on Delivery
 - Check #
 - rec payment in 15 days
 - Check #
 - Payroll Deduction
 - Check #
 - newcashcode
 - Check 2
 - Check #

At the bottom of the payment list are buttons: Checkout, Deallocate, Hold, and Remove.

The right-hand sidebar contains the following fields:

- Initial Deposit:
- Invoice Date: 06/03/2010
- Ship Date: 06/03/2010
- BATCH:
- User Def2:
- User Def3:
- Insurance: - Choose -

The footer of the page reads: "Copyright@1999-2010 by OpenPro, Inc. All rights reserved."

Getting Started with Point of Sale

After making the payment you can Generate the Invoice.


The screenshot displays the OpenPro software interface within a Mozilla Firefox browser window. The browser title is "OpenPro Bike Company -- Mozilla Firefox". The address bar shows "OpenPro Bike Company -". The main content area features the OpenPro logo and a navigation menu on the left. The menu includes categories like Development, Admin, Assist Import, Bank Reconciliation, CMMS Machines, Contacts (CRM), Document Imaging, Ecommerce, Executive Dashboard, Fixed Asset, General Ledger, Inventory Control, Job Costing, Manufacturing (ERP), Payables, Payroll, Point Of Sale, Maintenance, Reports P.O.S., PR Time Cards, Purchase Order, Receivables, Rules Setup, Sales Orders, Tech Knowledge, Warranty Service, and Work Flows. The main content area displays a list of system updates and a highlighted "Generate Invoice" link. The updates include: AR Open Item Created, Commision Updated, Customer Summary updated, Company Summary updated, Order type summary updated, Item Summary updated, Rebates Made, Updated Order, and XML processing complete. Other updates include Deposit Logged, Received: 0.00, and Terms: 97.20. The highlighted text reads: **US\$97.20 Customer Billed** and **US\$0.00 Change owed back**. The "Generate Invoice" link is underlined and blue. The footer of the interface shows "Copyright@1999-2010 by OpenPro, Inc. All rights reserved."

Getting Started with Point of Sale

Here is a sample invoice. You are ready for the next customer.

invoices_show_1311_Cocanut_Oil_Dist_CO - Mozilla Firefox
_ _ X

File Edit View History Bookmarks Yahoo! Tools Help



Location: DEMO
OpenPro Samburg Bike Company
10061 Talbert Ave #200
Fountain Valley, CA 92708

Phone (714)378-4603
Fax (714)964-1491

Invoice

Phone Order

Invoice#:	1311
Date:	06/03/2010
Due Date:	07/03/2010
Time:	17:31:06
Terms:	net30
Purchase Order:	

Bill To:
Mr. Frank Smith DD
Cocanut Oil Dist CO
10061 talbert ave Suite 203
Fountain Valley, CT 92708
USA
Phone (714)964-2140

Ship to: 6
Frank Smith
Cocanut Oil Dist CO
10061 talbert ave
Fountain Valley, 92708
USA
Phone 7149642140x210

Items Ordered:

Invoice#	Cust #	Ship to #	Order Submitted	Account Representatives	Order Type	Order Date	Ship Date	Ship Via
1311	6	6	Administrator Your	sales account rep	Phone Order	06/03/2010	06/03/2010	Customer Pickup Pickup

Item #	Description	Quantity	UOM	Unit Price	Discount	Price
FG100	FG100 OpenPro Mountain Bike	1.00	Each	90.00000	0.00	90.00
<p>MFG #: Manufacture# MFG: OpenPro Toy Company 1 UPC: 01238882231 FG100 OpenPro standard model This is more detail for this item Color: Blue Size: 15 Style: Height:</p>						

Quote #:	5418
Order #:	5418
Invoice #:	1311
BATCH:	
User Def2:	

Subtotal:	90.00
Taxes:	7.20
Shipping:	0.00
Total Due:	US\$97.20

Getting Started with Point of Sale

At the end of the day you can select Close Register and Balance by selecting “Record Deposit / Close Day”:

The screenshot displays the OpenPro software interface for 'OpenPro Bike Company - 4. Cash Out'. The main window title is 'OpenPro Bike Company - 4. Cash Out - Mozilla Firefox'. The browser address bar shows 'OpenPro Bike Company - 4. Cash Out'. The page header includes the OpenPro logo, the user name 'Your, Administrator', the date and time '06/03/2010 17:31:33', and the page title '4. Cash Out'. The page content is titled 'Location Receipt Reconciliation' and features three main sections: 'Cash Drawer', 'Estimated Cash Since 06/03/2010', and 'Summary'.

Cash Drawer		Estimated Cash Since 06/03/2010		Summary	
US\$100 Bills	0	Total Received	\$0.00	Register Float (Till):	99.00
US\$50 Bills	0	Number of Orders	0	Cash to Deposit:	0
US\$20 Bills	0	Total Start	\$99.00	Discrepancy:	99
US\$10 Bills	0	Total Cash Received	\$0.00	Checks:	0
US\$5 Bills	0	Total Cash (Estimated)	\$99.00	Bank Deposit:	0
US\$2 Bills	0	Total Terms	\$1,360.80		
US\$1 Bills	0				
Quarters	0				
Dimes	0				
Nickels	0				
Pennies	0				
Total Counted:	0				

Notes:

Record Deposit / Close Day

Representative : 101 Administrator Your Time: 06/03/2010 17:31:33

Copyright©1999-2010 by OpenPro, Inc. All rights reserved.

Getting Started with Point of Sale

OpenPro POS system has many options for discounts, rebates and promotions built into the system. A great advantage is that since the data is being updated in real time, the corporate office knows the exact status of each store during the day.

Reports can be generated throughout the day to determine peak sales times throughout the store chain. Real time reporting can also show “what’s hot and what’s not” at each store. If an item is selling well in one store and not in another, the manager of the “slow” store can be notified immediately to investigate why.

We at OpenPro keep our eyes and ears open at all times. We value your suggestions and comments. We are constantly improving and upgrading OpenPro so you will always “have it your way.” It is our mission to deliver OpenPro ERP exactly as you need it packaged. We will never say no!



OpenPro ERP Software

OpenPro Application Demonstration Guide II

10061 Talbert Ave Suite 200

Fountain Valley, CA 92708

Telephone 714-378-4600

Fax 714-964-1491

www.openpro.com

infoop@openpro.com