Openbravo Quickstart Guide

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I. Introduction

Through some practical examples, this quick start guide aims to properly introduce users to Openbravo, its interface, and basic functionalities.

II. Getting Started

The user guide will begin with the Openbravo login page.

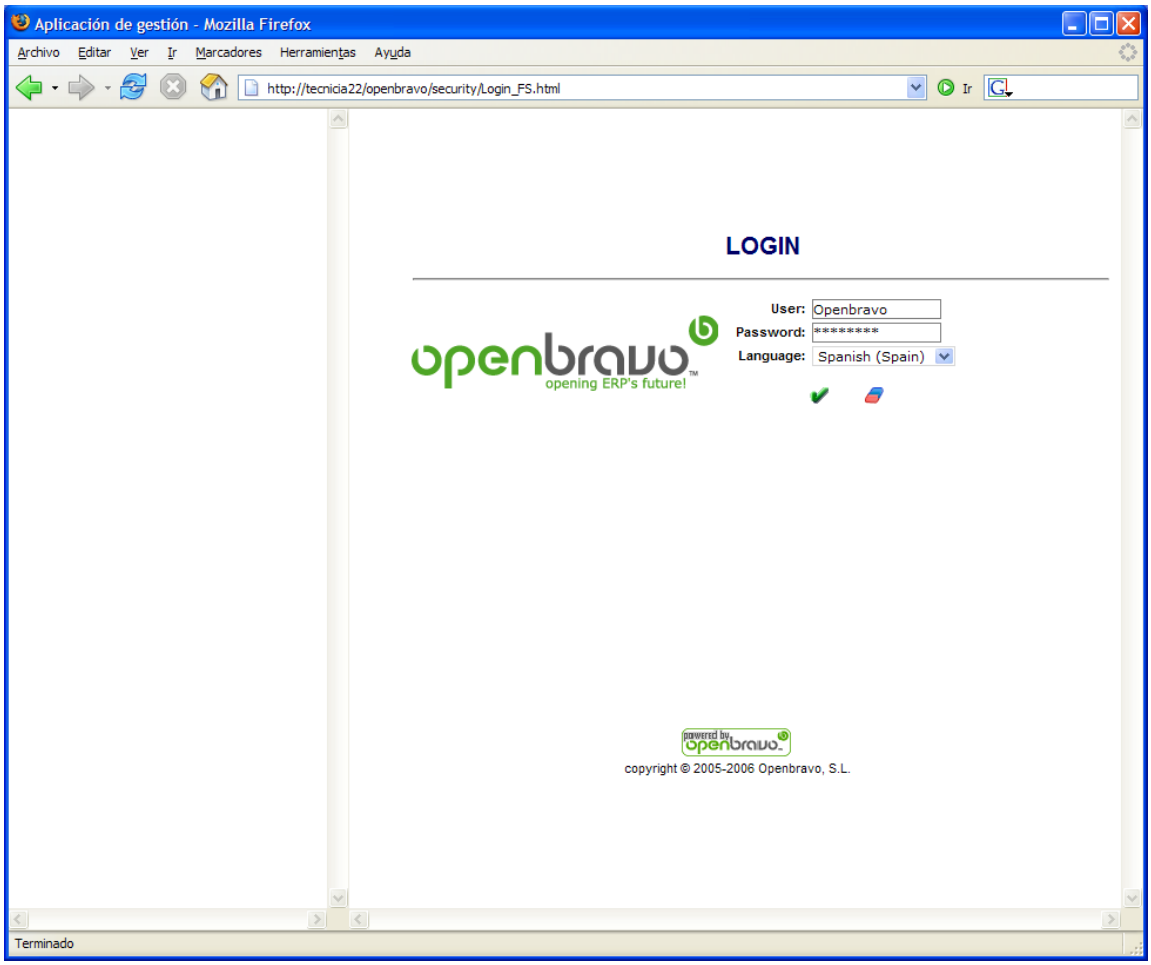

Illustration 1: Aplication login window

Here, the username and password are entered. It's also possible to select the preferred language (English for this example).

Once the system has verified user login data, the user will be taken to a window displaying additional login options.

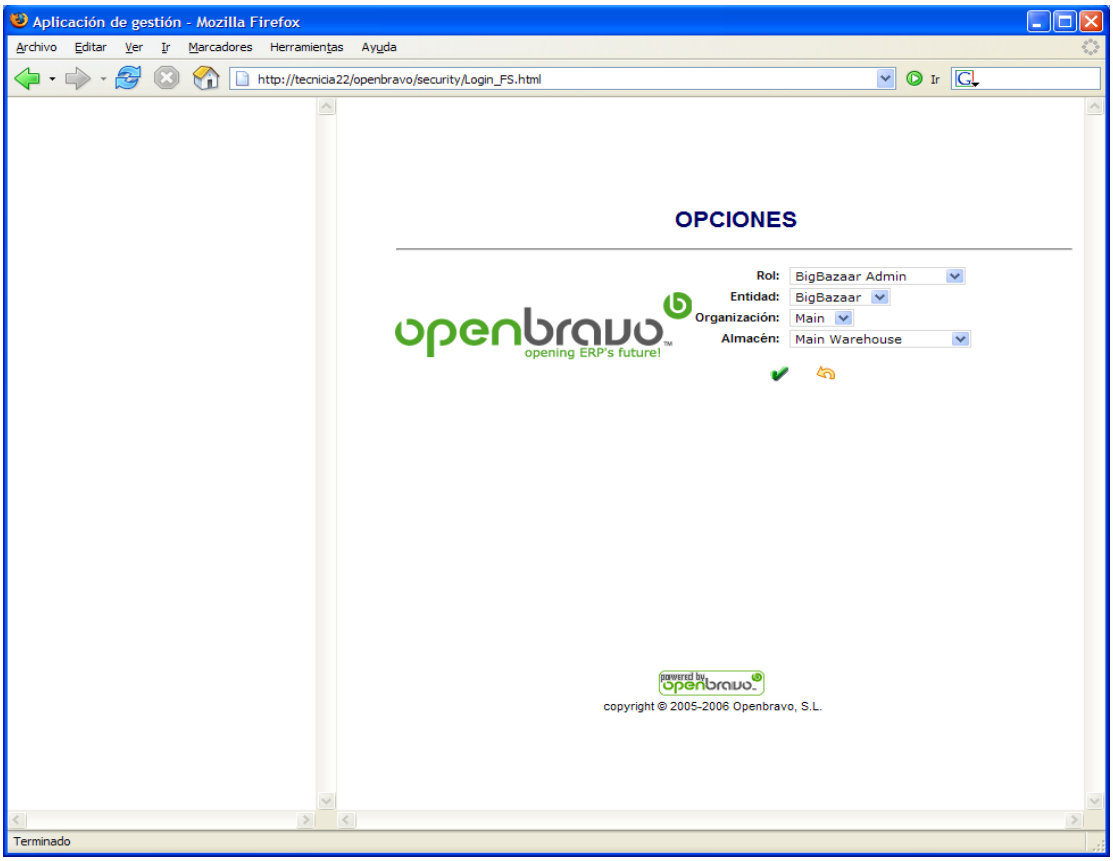

Illustration 2: Login options window

Here, the *role*, *company*, *department*, and *function* the user wishes to work with are indicated in order to provide the correct options. The role option determines which actions will be allowed, whereas the rest of the parameters tell the application which data the user will be working with.

III. Application Menu

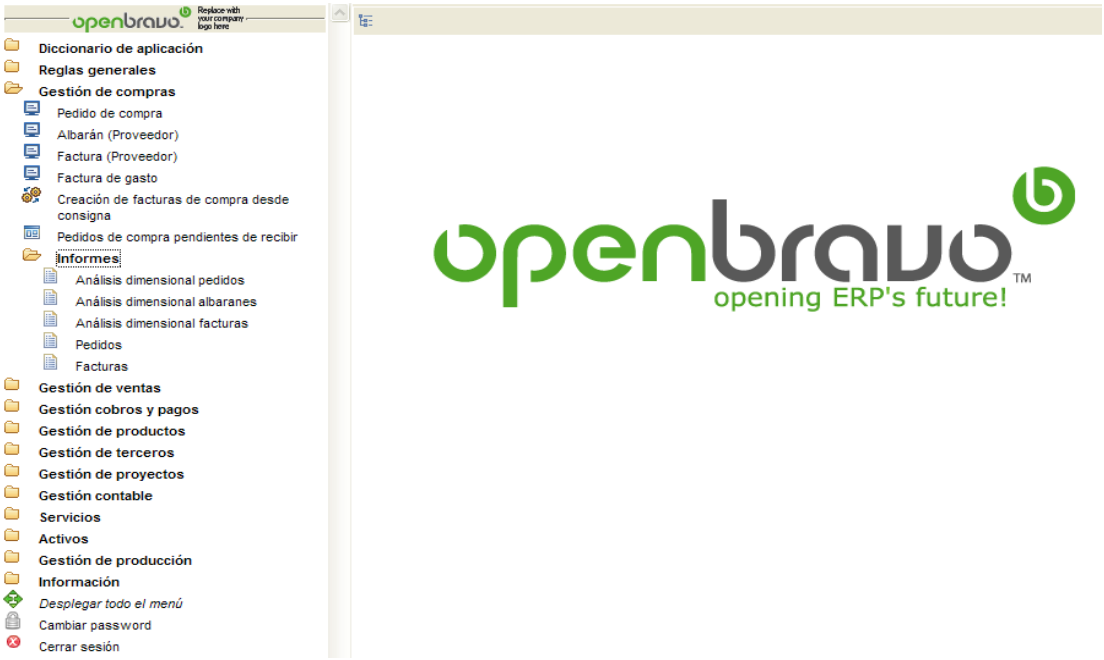

Illustration 3: Application menu

In the menu the different application modules can be seen. The modules accessible by each user are dependent on the permission granted. When the user clicks on one of the modules, (), it will open () and display the components of the selected module.

In the lower part there is an icon to “unfold the menu” which shows all of the options accessible for the role selected at login.

The type of option corresponds to one of the following components, which is identified by an icon:

- Standard Window
- Form
- Report
- Process
- Task
- Information
- Workflow

Users can access the different functionalities provided by Openbravo through the application menu in the left side. The following are the list of the application modules that can be found:

- **Application Dictionary:** Provides the necessary tools and utilities to manage the application (tables, windows, forms, information and processes).
- **General Rules**: Defines rules for the system as well as the way in which it will function (currency, organizations, and entities). Functions such as work rules, permission granted, and basic organizational data are managed here.
- **Purchase Management**: Includes functions and information for a company to process purchases (purchase requests, merchandise receipts, verification of supplier invoices, evaluation of suppliers, etc.).
- **Sales Management:** Consists of the main sales functions (sales requests, taxes, patents, invoices, commissions, etc.).
- **Collections and Payments Management**: Contains the functions for managers to receive and pay accounts (cash journals, remittances, transactions, etc.).
- **Product Management**: Provides access to master product data, company articles and components, and all operations related to the management and organization of warehouses (inflow, outflow, location, inventory, etc).
- **Third-party Management:** Defines master data management (suppliers, clients, or employees), and manages client relations (CRM).
- **Project Management:** Contains the necessary functions for companies to organize activities by delivery or completion of projects. Companies can manage the entire process including the budget, each phase, and the costs and purchases associated to each individual project.
- **Financial Management:** Includes the individual functions of financial management and general accounting (the account list, account data, taxes, balance sheets, account results, etc.)
- **Services:** Consists of functions for service providers to manage and control activities, regardless of the need to invoice internal or external clients. Detailed monitoring of incurred expenses is also available.
- **Assets:** Defines tangible and intangible assets, acquisition prices and accounting valuations, as well as present amortizations.
- **Production Management:** Includes access to the organizational production structure (sections, jobs, machines, etc.) and to functions necessary to manage production (prescriptions, trip tickets, manufacturing orders, manufacturing parts, work incidents, maintenance issues, etc.).
- **Information:** Provides a centralized data list from several selection criteria, the data already registered in the application, clients, effects, invoices, orders, products, etc.

In most cases, the access folders to functions include a subfolder with the **Configuration Rules** and parameters of the respective functional area. This also occurs in the subfolder of Reports.

IV. Editing Window

One of the basic functions of Openbravo is the inclusion of master data, for example how the user can add product data. If the form “Product” in the module “Production Management” is selected, the product-editing window will open in the right hand part of the browser.

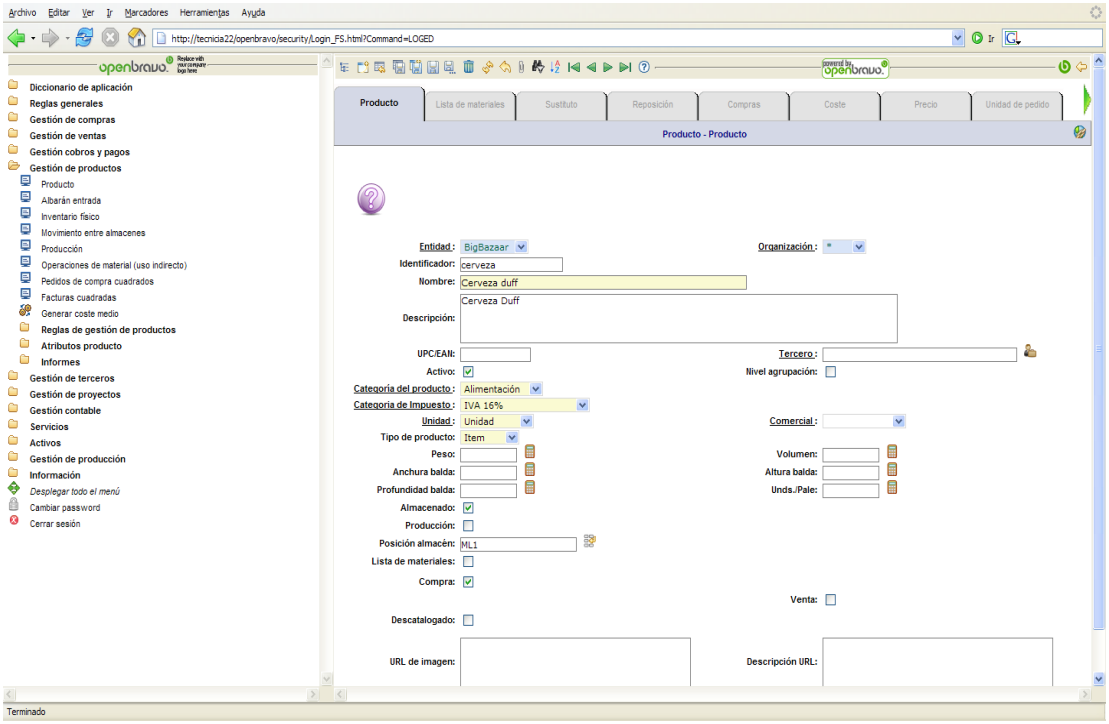

Illustration 4: Product window

In this window well-differentiated zones can be seen, which are described in the following sections:

IV.1. Buttons Toolbar

The buttons toolbar can be found at the top of the page which shows the actions that can be carried out in each of the windows.

Illustration 5: Details of the buttons toolbar (Product Window)

The following is a list of actions that can be carried out using the buttons toolbar:

- Hide or show the menu, which allows the user to increase the work

area of the window.

- Create a new record
- Save the current record and go to the statement of records
- Save the record and show the form to create a new record
- Save the record and maintain the active record displayed
- Save the record and move to the next record
- Erase the record
- Show the documents attached to the active record
- Print the document
- Show the records in statement mode
- Allow editing of a specific record
- Show the filter records window
- Show the select record order window
- Refresh the window to return to the initial state before editing
- Refresh the window data
- Move to the first record
- Move to the previous record
- Move to the next record
- Move to the last record
- Show the help window for the form
- Show information about the product version
- Show the previous form

IV.2. Tabbed Menu

At the top of the product window is a tabbed menu which displays the product information in a way that is organized and easy to follow. Information is grouped in a clear manner.

Illustration 6: Details of the tabbed menu (Product window)

Focusing attention on the height of the tabs, we can see the relationship between each one (in this case we are able to see that all of them are subsections of the tab “Product”).

IV.3. Work Area

The remainder of the window is occupied by the product window referred to earlier, including its specific fields.

In this case, the product window has been configured in a large size, so that when it is opened, the possibility of filtering the data to be viewed is given through a filter window. If the accept button ( ) is pressed, leaving the selection fields empty, all records are shown.

Illustration 7: Filter window (Product window)

In the Tabbed menus, a button for References ( ) can be seen. With this button the windows that have records which make reference to the current record are shown. This allows forward browsing and by choosing one window, the details of the records of this selected window are shown.

Illustration 8: Reference Window

When one of these windows is selected, the user is shown all the records that are referenced to this record.

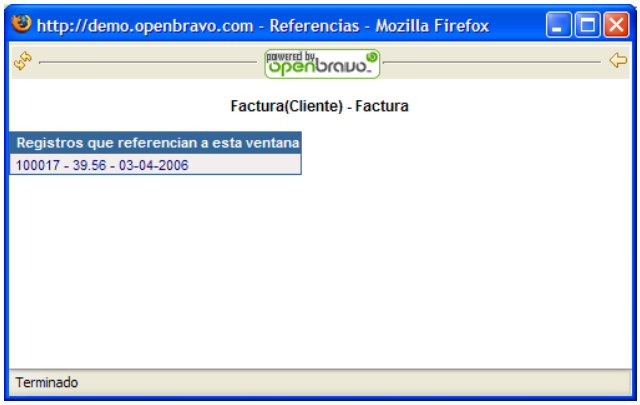

Illustration 9: References window (next window)

Another useful feature of the window of this application is the inclusion of options that help to enter data. These are the following options:

- Products
- Projects
- Accounts
- Gaps
- Attributes
- Third Party
- Orders
- Delivery Notes
- Invoices
- Activities
- Calendar
- Calculator

( ) In this window, this gap finder appears, which helps the user find a place for the product:

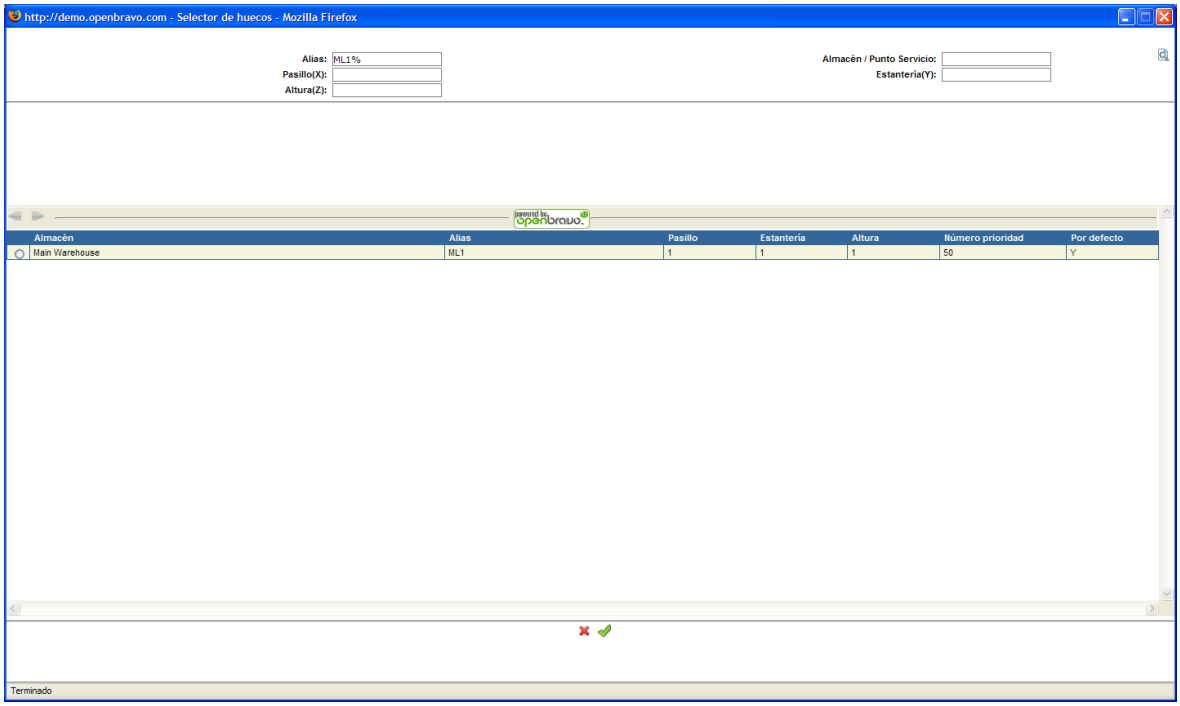

Illustration 10: Window to see product gaps

In the product window all operations for the editing of a record can be carried out. Before carrying out another operation or making changes in another tab of the product, the record must be saved in a clear way using one of the save buttons: (, , y).

If after making a change the user tries to carry out another operation, the system will advise that these changes have been made:

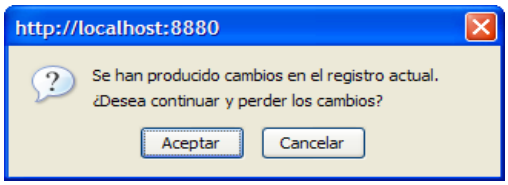

Illustration 11: Confirmation of Changes

V. Process Window

Another common procedure is the creation of documents, such as sales orders. For this operation, “Request window from the Sales management module” is selected

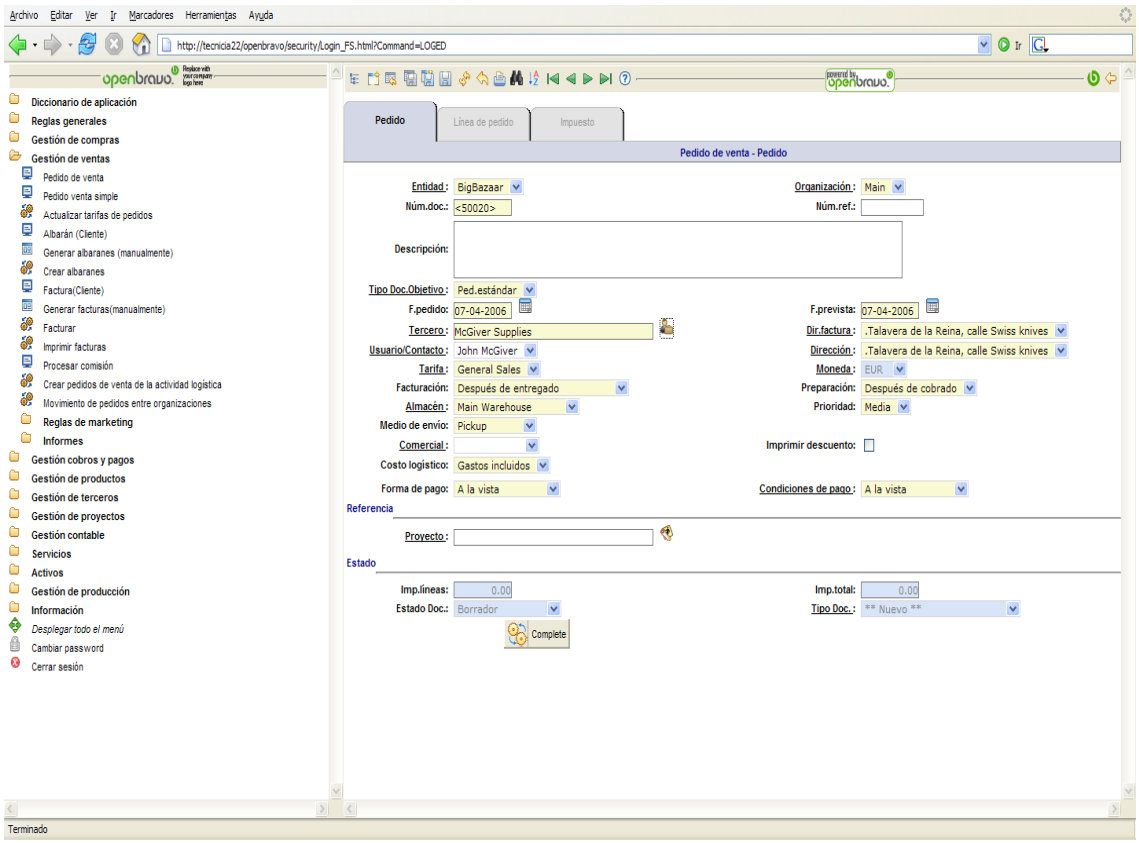

Illustration 12: Purchase Order Window

The buttons here are the same as for editing a product. Nevertheless, just in case, some new controls appear enabling the user to edit the order and its lines. These are the options that allow the user to select certain groups, such as third-parties or products.

Clicking the “New” button ( ) a new user can be created.

In the header of the order, if the user selects the third party that will fulfill the order, they may enter their code and click Enter or make the selection from a corresponding list of available suppliers:

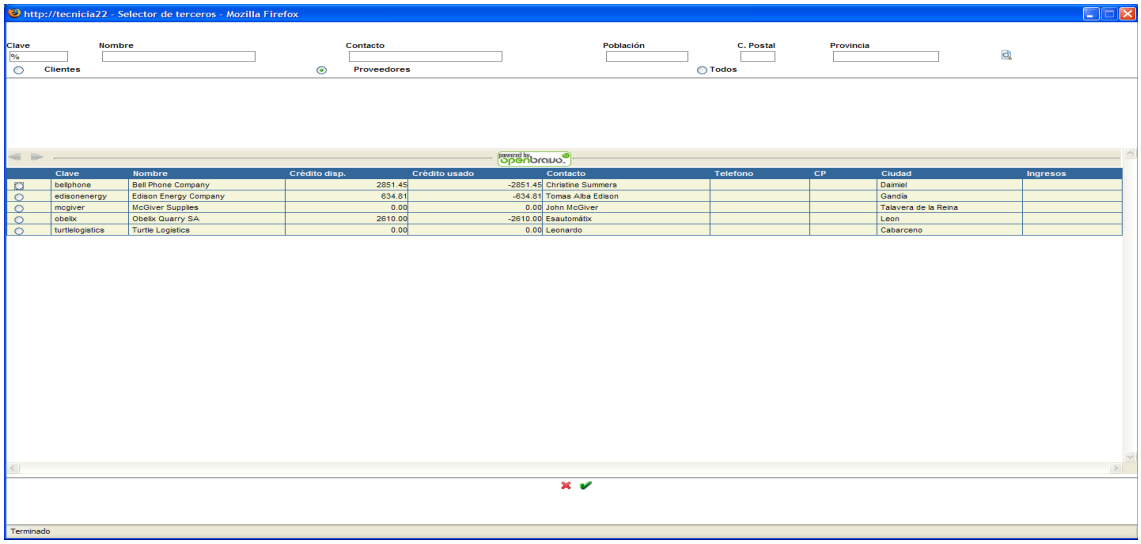

Illustration 13: Third-Party window

To add new lines to the order, the user should first save the header and then click on the “Order line” tab

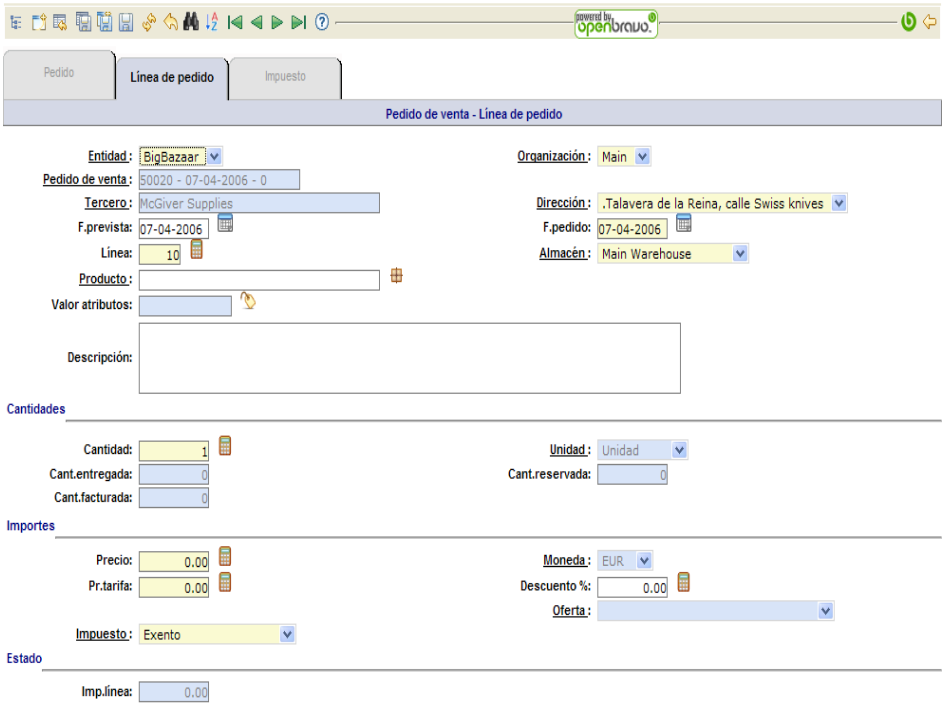

Illustration 14: Order line window

(🖳) The product selector can be used to search for the required product.

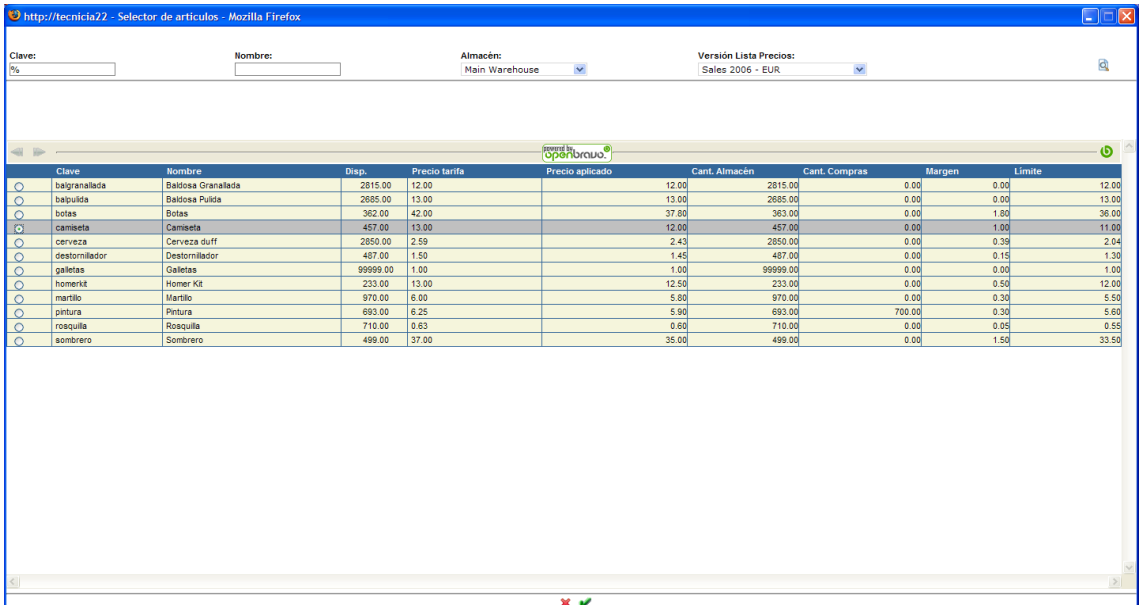

Illustration 15: Product selection window

Especially useful is the “save and new” function ( ) in the buttons toolbar, which can be used to sequentially add all the lines of an order.

Once all the order lines are added, the order is completed by clicking the “Complete” button. The next window shown allows the completion, cancellation or processing of the order. Just in case the user forgets, there is a brief comment informing them of the result of each action.

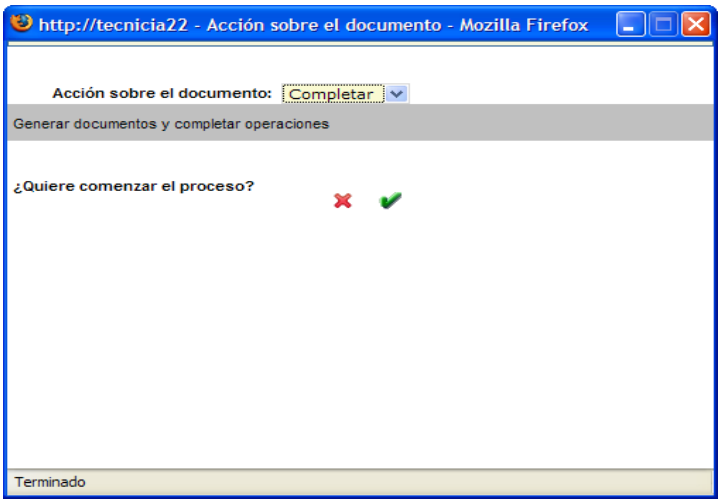

Illustration 16: Document action window (Order)

If the order is not completed, it will be stored in the system, but will not be processed.

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