How to
Achieve Tasks in ADempiere

DOCUMENT SUMMARY SHEET

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1 Records

1.1 Adding a New Record

To Add a New Record complete the following steps:

1 Click the New Button , Ctrl-N or select File/New Record from the menu.

2 Change any default information that has pre-populated fields. Enter values in all required fields (required fields will appear shaded in colour)

3 When all data has been entered click the Save Button or Ctrl-S.

4 You can ignore all changes by clicking the Ignore Button or ESC

1.2 Changing an Existing Record

You can change any field on a record and this change will be reflected on any transaction that uses this record.

To Change an Existing Record complete the following steps:

- Retrieve the record you want to change.

- Go to the field or fields that you want to change and enter or select a new value.

- When you have made all the desired changes click the Save Button or Ctrl-S.

1.3 Ignore Changes

A record can be restored to its original state by clicking the Ignore Changes button , hitting the Escape Key or selecting Edit/Ignore Changes.

1.4 Deleting a Record

To Delete a Record complete the following steps.

- Retrieve the record you want to delete in the single record view or highlight the record you want to delete in the multiple record view.

- Click the Delete Button , Ctrl X or select Edit/Delete Record.

Records that are used elsewhere in the system or that is required for audit purposed cannot be deleted, but you can deactivate them.
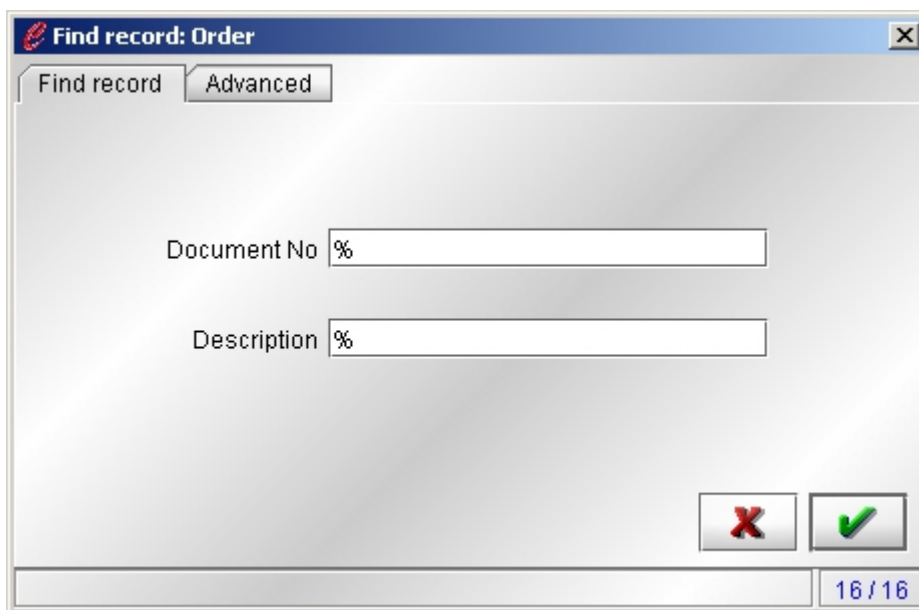
1.5 Copy a Record

Copying is creating a new record by copying the values of an existing record as defaults. You need to change the unique information (e.g. value/key) before you can save it. To Copy a Record complete the following steps.

- Retrieve the record you want to copy in the single record view or highlight the record you want to copy in the multiple record view.

- Select Edit/Copy or Ctrl-V.

- Change the field(s) desired.

- Click the Save Button ![save icon] or Ctrl-S.

1.6 Searching for Records

There are two methods available to search for records. Both are accessed in the same manner.

To perform a Simple Search complete the following steps.

Open the screen which displays the record you want to search for.

Click the Find Button ![find icon], Ctrl F or select View/Find Record

In the Simple Search tab enter the values you want to search on. These fields will vary depending on the screen. You can use the % before or after characters to act as a wildcard

Click the OK check mark and the records that meet the search criteria will be displayed.

To perform an Advanced Search complete the following steps.
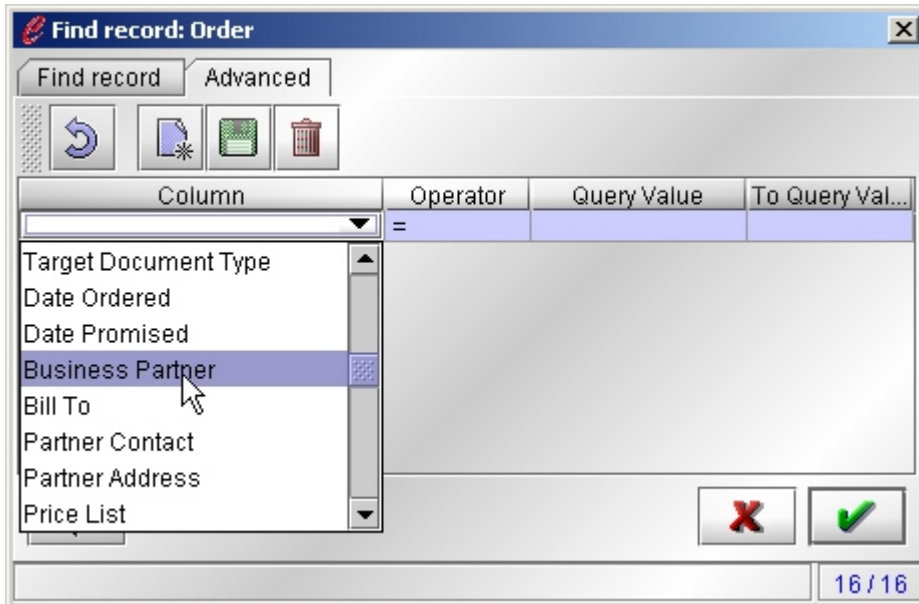
- Open the screen which displays the record you want to search for.

- Click the Search Button or Ctrl-F.

- Click the Advanced Tab.

- Construct a query by selecting a Column to search, the Operation to perform and the Key value to compare. You can combine multiple statements by using the and/or field.

- When you have entered the desired criteria click the OK check mark and the records that meet the search criteria will be displayed.

To restore the screen to all records click the Refresh Button or by entering Cancel in the Find screen.

Zoom allows you to go directly to the definition screen for a field on the current screen without leaving the current screen or losing any data already entered but not yet saved. Zoom can be used on any field that is defined on one screen and referenced on another.
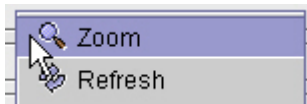
To use the Zoom feature complete the following steps.

- Position the cursor within the field you want to zoom from.

- Click the right mouse button and select Zoom.

- The screen where the field is defined will appear.

- If the necessary record is not present, you can add a new record provided you have the necessary permissions to do so.

- Close the screen to return to the original screen.

- If you added a new record position the cursor in the field and click the right mouse button and select Refresh. This causes the new record(s) to appear in the drop down list.

- Select the desired value from the drop down list.

If the field is a business partner field, you have the additional option to start the "Quick Entry" Screen for new or existing business partners.

The Business partner Quick Entry allows you to capture the main information.

2.1   Changing Data View

You can switch between the single record view and multiple record view by clicking the Data Grid Toggle or select File/Data Grid Toggle. The toggle changes depending on the state.

2.2   View History

History can be viewed for any transaction. By default, you will view only active (non completed) transactions and those transactions entered today. Once a transaction is complete it can be viewed by clicking the View His-tory button or by selecting View/History Records. The History records can not be altered in any way. When your view includes historical records the toggle shows .

2.3   Attachment

Any record can have an attachment associated with it. This may be notations, product specifications or record specific information. To add attachments click the Attachment button . Each record can have multiple at-tachments. To view an attachment click the Attachment button or select View/Attachment. If the record has an attachment, the button changes to . If the attachment is a graph, it is directly displayed in the attachment.

2.4 Refresh

To have the records for a screen retrieved from the database again click the Refresh button ⟳ or select Edit/Refresh Menu.

2.5 Menu

To bring the Main Menu into focus click the Menu button 🏠 or select Go/Menu.

2.6 Printing

ADempiere has three different print options: (1) a document like an invoice is printed by clicking the Print button 🖨 or selecting File/Print. (2) To print a screen select File/Print Screen. (3) To print a report, press the Report button 🔍 and print from the report viewer.

2.7 Navigating through records

You can navigate through records by using the Arrow Buttons. The Next Record button ⌄ , Page Down or Go/Next Record will display the next unique record. The Last Record button ⤓ , End, or Go/Last Record will display the last unique record. The First Record button ⤒ , Home or Go/First Record will display the first unique record. The Previous Record button ⌃ , Page Up or Go/Previous Record will display the previous record.

Navigating tabs can be done by clicking on the tab or using one of the following options. The Detail button ❯ , F12 or Go/Detail Record will display the detail record in the next tab. For example, in the Order screen F12 will bring you to the first Order Line. The Parent button ❮ , F11 or Go/Parent Record will display the parent tab record. For example, in the Order Line screen F11 will bring you to the Order screen for that Line.

2.8 Account Info

From any screen you can select View/Account Info to display Account information.

2.9 Business Partner Info

From any screen you can select View/Business Partner Info or Alt P to display Business Partner information.

2.10 Product Info

You can retrieve the Product screen at any time by clicking the Product button , Ctrl P or selecting View/Product Info. This is helpful, if you are in the middle of a transaction and you receive a call and want to access product information.

2.11 End Window

You can close an active window by clicking the End Window button , Ctrl X or selecting File/End Window. When you close a window via those options, you will be asked if you want to save your changes. If you leave the system by clicking on the upper right and corner of the window, you will not be prompted to save any changes.

You log out and leave the system via or File/Exit System.

3 Adaxa's Offices and Contacts

Information of a general nature about Adaxa and its services can be found at www.adaxa.com or obtained by sending an email to info@adaxa.com with a description of the information that you would like to receive. If you are an existing client and wish to initiate a request for software support please send an email to helpdesk@adaxa.com with as much detail as possible about the nature of your support request.

For all other information please contact the Adaxa office nearest to you.

3.1   Australia

Address: 10 Kylie Place, Melbourne, Victoria, 3192, Australia

Contacts: Office

- 1300 990 120 (Within Australia)
- +613 9510 4788 (Outside of Australia)

3.2   New Zealand

Address: 73 Boston Road, Mt Eden, Auckland, 1023, New Zealand

Contacts: Office

- 0800 232 922 (Within New Zealand)
- +649 9744 600 (Outside of New Zealand)

3.3   United States of America

Address: 4400 NE 77th Ave, Suite 275, Vancouver, WA 98662, USA

Contacts: Office

- +1 760 576 5115