



eKEPLER 8.0+ START UP GUIDE



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Introduction

This guide is intended for new users on eKEPLER. It will show you the basic commands of the ERP, and how to move along the different option screens.

Connection Screen

The connection screen of eKEPLER will require that you enter your username, password, role and the server IP address which you are going to connect.

Each user can have different roles, in order to see the different roles a certain user you need to type * in the role or leave the role blank, once you connect to the server you will see a list of the different roles the user has access to.

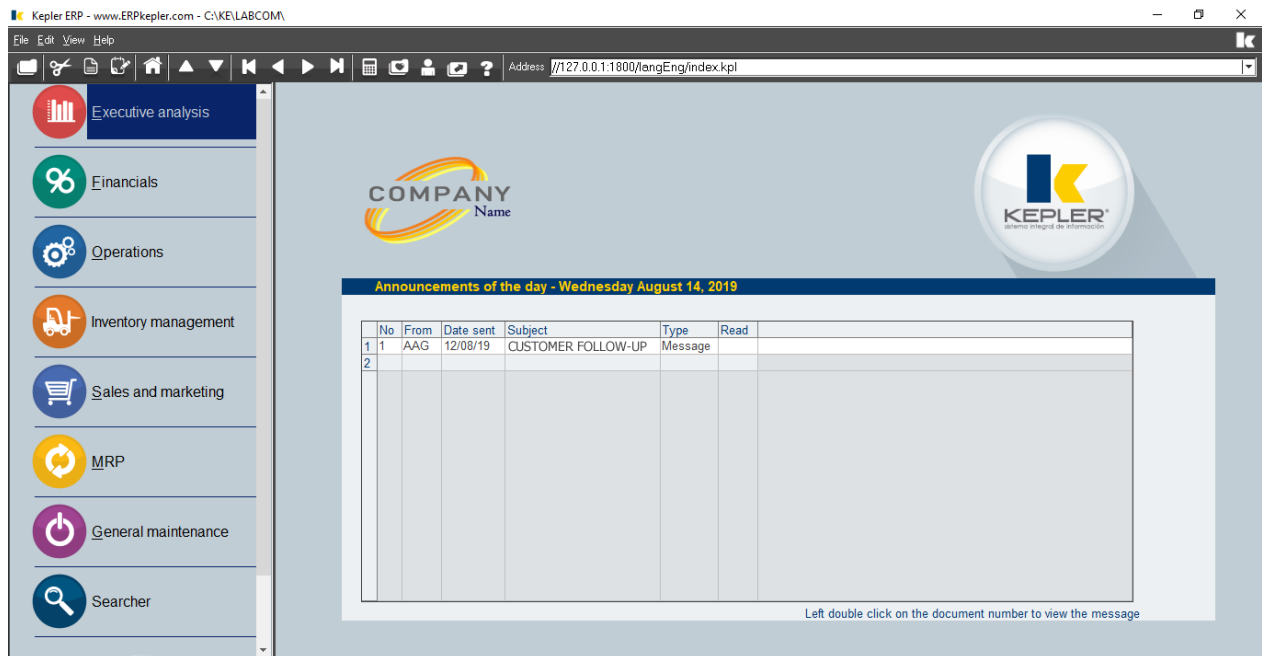
The screenshot shows a web browser window titled "Server connection - www.ERPkepler.com". The address bar contains "langEng/ks_ini.kpl". The main content area features a dark blue login panel with the eKEPLER logo on the left. The panel is titled "Access to ERP KEPLER" and contains the following fields and controls:

- User:
- Password:
- Role:
- Language:
- Server:
- Login button: A green circular button with a white play icon.



Home Screen

To the left side of your home screen you will see the menu or tree of eKEPLER. In this tree or menu you will find the different modules and options a certain role and user has access to. In the right hand side of the home screen, you will find the operation screen; this screen will show you the option or report in which you have entered. You may change from the right-side to the left-side using **Ctrl. + Tab**.



The home screen of eKEPLER is composed by:

- Title bar: Show you the title of the current screen being viewed.

Announcements - www.ERPkepler.com -

- Menu bar. This will show you the basic menus of eKEPLER. You can access the menu bar by pressing ALT + underline letter.

File Edit View Help

- Tool bar: This bar contains the buttons for the most common commands and tools in eKEPLER.



- Address bar: Identify the server address, port and the name of the option that is being accessed.

Address //127.0.0.1:1800/langEng/announcements.kpl



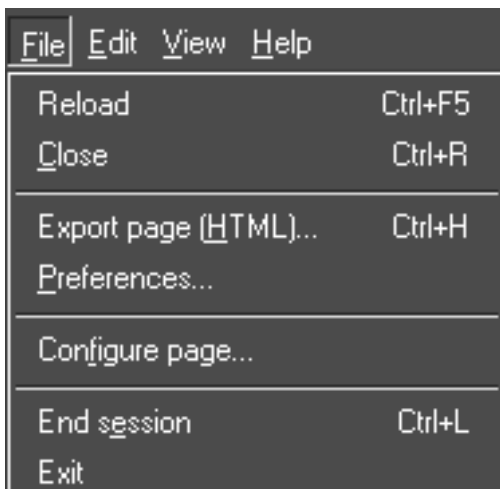
- Status bar. You will find this in the lower right hand side of your screen. This bar will show you information regarding the current status of the screen, the current time, your user and the company in which you are currently working on.



Menu Bar

The options contain in this menu bar are quite similar to those found on any Microsoft products. Nevertheless, the options that are shown can vary from screen to screen.

File Menu



In this Menu you can find:

Option	Description
Reload	Reloads the option or page being viewed.
Close	Closes the current page being viewed.
Export page (HTML)	It allows you to export the information generated by a report or an on-screen consulting page to a regular HTML or text file. You can also save the information on the Windows clipboard, in order to export that information to excel, word, notepad, or any other Microsoft application.
Preferences	In this option you can configure the initial access for eKEPLER. You can change the initial page, by default eKEPLER will show you the menu-tree displayed on the left side, but you can configure your access to being in a certain option or page. If the page or option has a "_" before, this means that the option being used is located in the client side, and not in the server. You can also



Configure page

configure your user, role and password for easy access, and the email parameters for sending emails using the eKEPLER mail. The language configuration in the GENERAL subset refers to the language being used for the client access program.

End Session

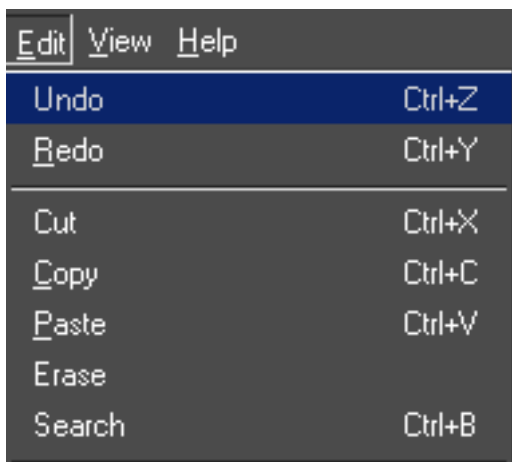
In this option you can configure the various printing parameters which you will be used when printing a report from eKEPLER.

Exit

This option closes the current session and returns the user to the connection screen.

This closes the eKEPLER client.

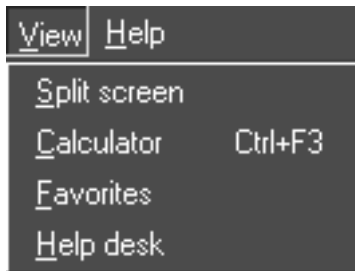
Edit Menu



Inside this menu you will find the following options:

Option	Description
Undo	It undo's the last action.
Redo	It redo's the last action that was undo.
Cut	Erases the text selected and places it on the MS clipboard.
Copy	Copies the selected text to the MS clipboard.
Paste	It copies from the MS clipboard the last text placed there.
Erase	It erases the select text.
Search	Places the cursor on the search engine option, where you can enter the name of some system option.

View Menu



Split Screen: In this option we can find the Split screen. When the split screen is not used, we can fully view on the screen the page or option being used, and the menu-tree is hidden. (Fig 1). When we use the split screen we can view on the left side the menu-tree and on the right side the current page or option being used. (Fig 2).

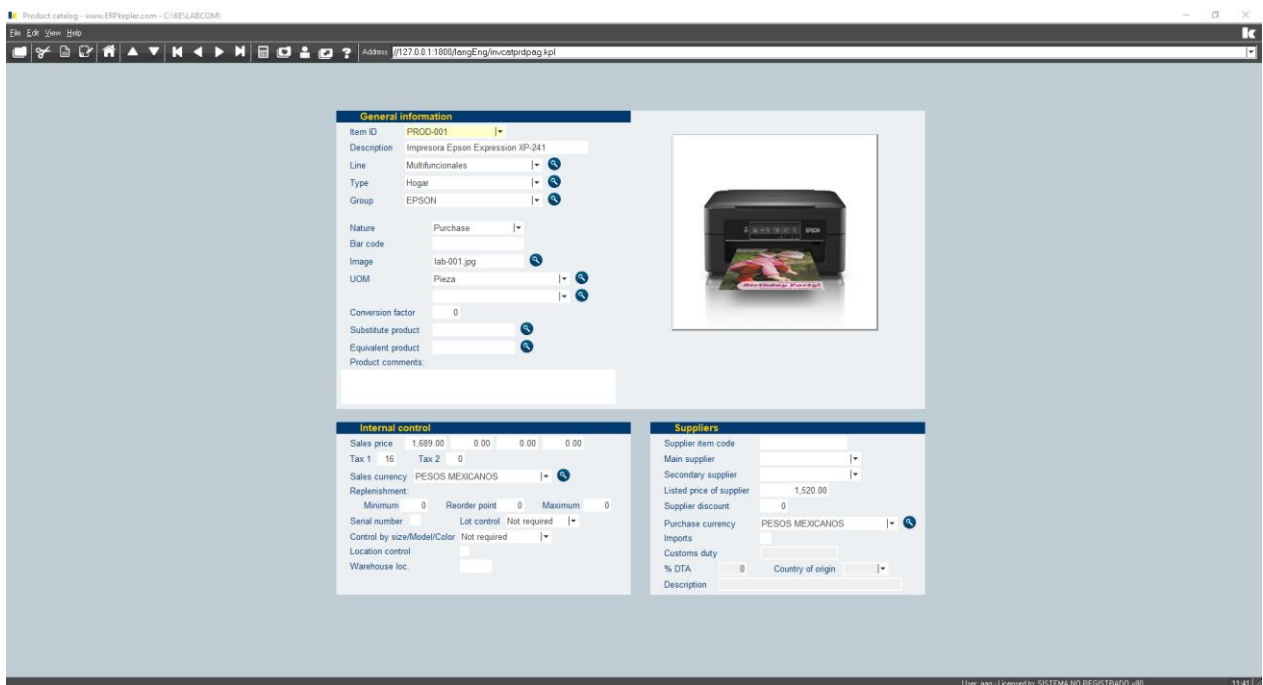


Fig 1. Page viewed without split-screen.

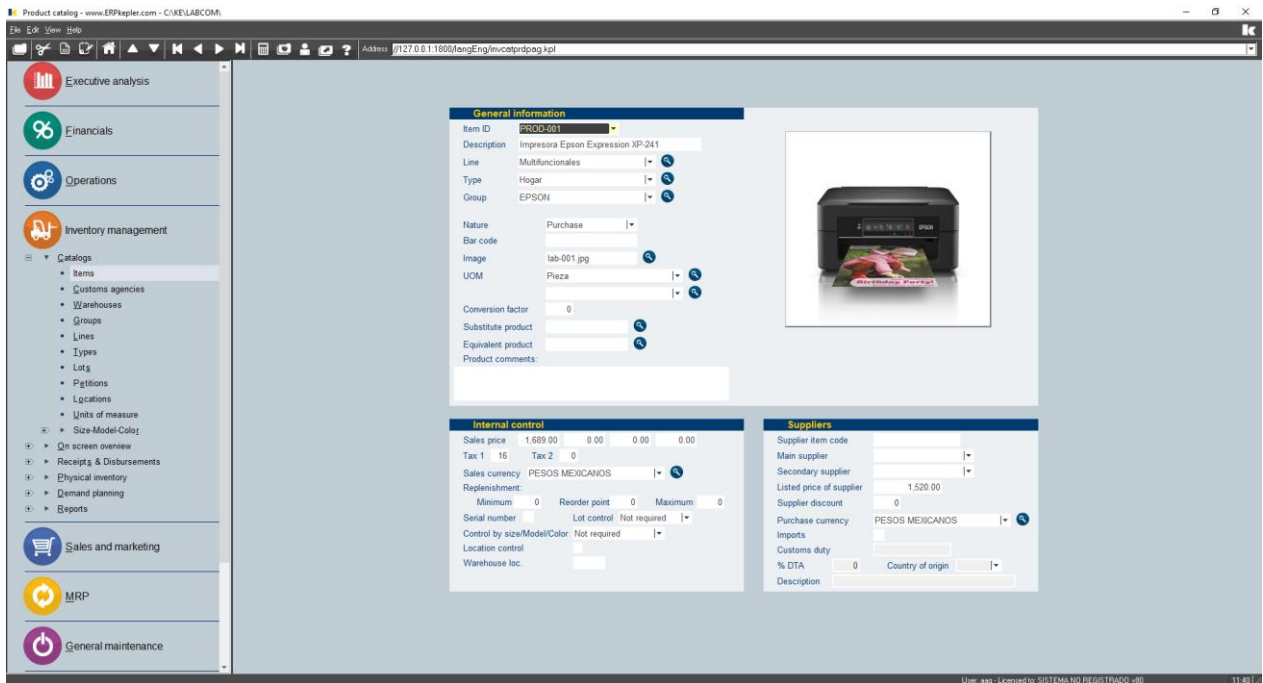


Fig 2. Page viewed using split-screen.

Calculator

On the *view menu* we can also find the calculator. This option shows the windows calculator. This calculator can also be shown by pressing F3.

Favorites

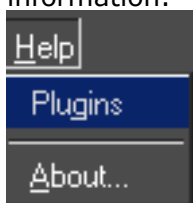
This option allows you to create a list of favorite options per user. The user can customize it's access to the ERP, prioritizing each option and indicating a brief description that is more relevant to him. Through this option you can have direct access to the options that have been defined. You must have previously have registered users.

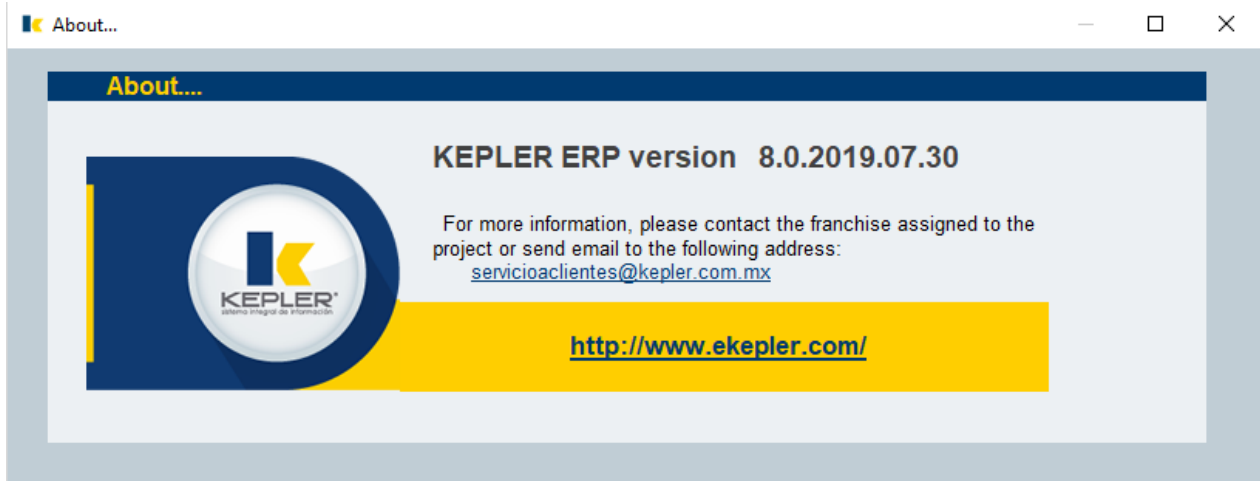
Help desk

This option allows the user to send an email to the person in charge of the ERP Support within the company. The fields will be filled in automatically, including the option that the user is viewing, so that the user will only register his / her question to the person in charge.








Help menu

In the HELP MENU you can find the Access to the eKEPLER PLUGINS page and in the about section you will find information regarding the ERP's version, and customer service contact information.





Tool Bar

Button	Description
	Cut, copy and paste. This three buttons have the same function of those found on the EDIT Menu Bar.
	Close session. This closes the current session in eKEPLER and returns the user to the connection screen.
	Navigation Arrows– this buttons are used to move around the menu-tree. You can also use ALT + Down Arrow, and ALT + Up Arrow to move around.
	Page and Catalog positioning arrows. This buttons have two basic uses. They will place the user on the last or previous page or option that was used. When the user is located in a catalog; the first two will place you on the previous record or the first record, and the last two will place you on the next or last record
	
	Shows the Microsoft calculator. This calculator can also be shown by pressing F3.
	Shows the <i>Favorite</i> option.



Shows the Help Desk option.



Opens a new eKEPLER instance using the connection parameters being used.



Shows additional information about the option in which we are working.

The following icons are shown only on non-Screen Consulting pages or options.



Prints the information being show on a table or grid.



Allows you to export the information on a grid to excel, html, text or send the information be email.



Executes the option or screen.



Any one of these icons generates a particular graph. The graphs that are generated correspond to the graph being shown on the picture.

Icons used in eKEPLER operative screen.



Accept Button. This button creates or eliminates, depending on the page or option being used, the eKEPLER document.



Cancel Button. This button erases the information and data on the current page or option.

NOTE: On each icon has a *tool tip* which contains a brief description on what the icon is for.

Example:



Execute analysis

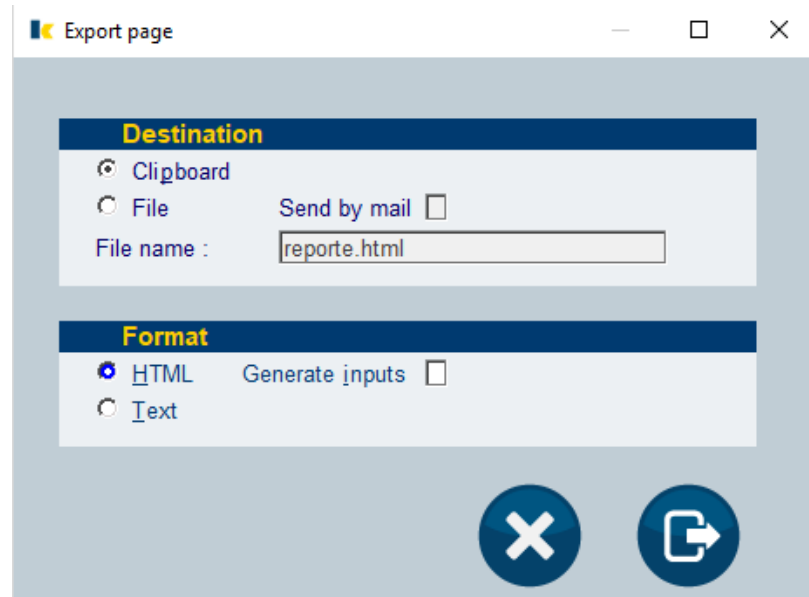


Creates purchase order

Icons used in the Purchase Requirement option in the Distribution Module

Export page.

You can export any page or option in the ERP. You can access the export page by the File – Export page menu or by the export page icon located on the upper right hand side of the screen, or by pressing CTRL+H.



The parameters of this page are:

Destination

- Clipboard: This allows you to copy the current page to the clipboard, in order to paste the information on other applications, such as MS Excel, Word, notepad, etc..
- File: this option creates a file on a text or HTML format.

Format

- Define the format of the file to be created the file can be HTML or a simple text file.
- Generate inputs: This is only use on HTML format export. This allows you to export the input objects on the page or options, as they appear on the screen.



Branch: CASA MATRIZ
Currency:
Customer:
Date: 08/15/2019
Include sales documents only

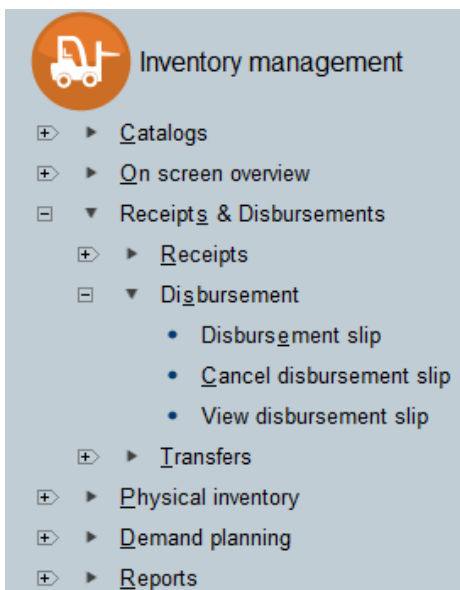
	Branch	Customer	Customer name	Invoice no	Description	Invoice date	Due date	Currency	Amount	Reference	Due amount	Days due
1	01	CLI-001	JUMEX MÉXICO	0000002	Ventas sin garantía	2019/08/13	2019/08/28	PESOS	8618		8618	0
2	01	CLI-002	TRUPER MÉXICO	0000007	Alta de renta	2019/08/09	2019/09/08	PESOS	3489.5		3489.5	0
3	01	CLI-002	TRUPER MÉXICO	0000008	Alta de renta	2019/08/09	2019/10/08	PESOS	3489.5		3489.5	0
4	01	CLI-002	TRUPER MÉXICO	0000009	Alta de renta	2019/08/09	2019/11/07	PESOS	3489.5		3489.5	0
5	01	CLI-002	TRUPER MÉXICO	0000010	Alta de renta	2019/08/09	2019/12/07	PESOS	3489.5		3489.5	0
6	01	CLI-002	TRUPER MÉXICO	0000011	Alta de renta	2019/08/09	2020/01/06	PESOS	3489.5		3489.5	0
7	01	CLI-002	TRUPER MÉXICO	0000012	Alta de renta	2019/08/09	2020/02/05	PESOS	3489.5		3489.5	0
8	01	CLI-003	SERVICLEAN	0000014	Alta de renta	2019/08/13	2019/10/12	PESOS	4534.67		1949.34	0
9	01	CLI-003	SERVICLEAN	0000015	Alta de renta	2019/08/13	2019/11/11	PESOS	4534.67		4534.67	0
10	01	CLI-003	SERVICLEAN	0000016	Alta de renta	2019/08/13	2019/12/11	PESOS	4534.67		4534.67	0
11	01	CLI-003	SERVICLEAN	0000017	Alta de renta	2019/08/13	2020/01/10	PESOS	4534.67		4534.67	0
12	01	CLI-003	SERVICLEAN	0000018	Alta de renta	2019/08/13	2020/02/09	PESOS	4534.67		4534.67	0
13	01	P-002	Hewlett Packard Enterprise Mexico	0000001	Venta con garantía	2019/08/09	2019/08/09	PESOS	5090		5090	6
14	01	P-005	Dell México	0000003	Venta con garantía	2019/08/13	2019/08/23	PESOS	27208	123456GHYU	27208	0
15												
									84526.35		81941.02	

<F10> o left-Click on customer for detail.
< F10> o left-Click on invoice no. for detail.

Menu Tree

The menu tree is used to navigate and move around the eKEPLER options and modules a certain user has access to. You can easily and quickly move around this menu-tree by pressing the letters underline in each module-sub module and option. For example, if we wanted to go to the chart of accounts, we could type FACA (Financials-Accounting-Catalog-Chart of Accounts)

The icons represented by ► indicate that there are more options or modules inside the folder. The symbol ⊞ indicates that you can expand the sub-tree to see the options included in the module. The symbol ⊞ shrinks the tree, closing the options and sub-modules in that particular module.







eKEPLER Options or Pages.

eKEPLER has 4 basic types of options or pages, these are Catalogs, On screen consulting, Operation and Reports.

Catalog

Customer information		Extra	
Customer ID	CLI-001		
Name	JUMEX MÉXICO		
Address	Blvd. Miguel de Cervantes Saavedra 301		
	Granada		
City, State	Ciudad de México		
Zip code	11520		
Phone(s)	55 5699 1999	Fax	
EIN.	AAAA010101AAA		
E-mail	contacto@mail.com		
Additional information			
Sales agent	Juan Francisco Castro		
Group	Cliente A		
Zone	México DF.		
Credit limit	0.00	Term	15
Discounts	(1) 0.00	(2) 0.00	(3) 0.00
Commissions: On sales	0.0000	Commissions: On collections	0.0000
Revision:	Day	Hour	
Pay:	Day	Hour	
Comments:			


Fiscal address


Shipping address

Elements

Description



Text Input. Allows the user to type any text information

Combo Box. This shows the User the available options to be used on a certain field.

Search Button. This button allows the user to search for a certain value.



In order to move around the different inputs on an eKEPLER page you can use the TAB key to go to the next field, the SHIFT+TAB to go to the last field, or the arrows or mouse to move around the different fields.

To move around the different records in a catalog you can use the PgUp and PgDn keys, or the buttons in the tool bar located on the upper left side. For more information see the menu bar section on this same document. You can also use the CTRL+ HOME key to go to the first record, and the CTRL+END key to go to the last record on a certain catalog. The END key will place the user on the last field in the catalog.

To create a new record on an eKEPLER catalog, the user has to type an ID, which is commonly the first field that appears on screen, and another field that is not part of the ID. For example, in a customer catalog, you have to type the customer ID and the customer's name. Normally the ID field, which is necessary to create a new record, appears in yellow.

Customer ID	P-002 ▾
Name	Hewlett Packard Enterprise Mexico

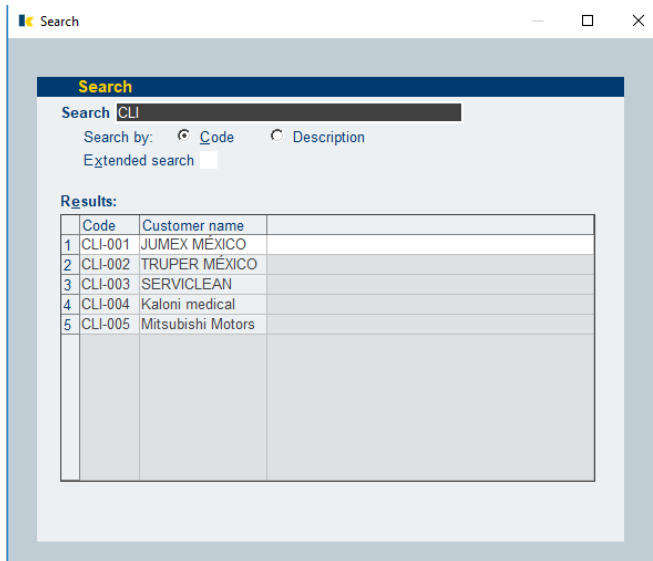
Example of a catalog with one identifier field. (Customer ID)

Warehouse data	
Branch	Headquarters ▾ 🔍
Warehouse number	1 ▾
Description	Principal Warehouse
Isolation warehouse	

Example of a catalog with two identifier fields (Branch and warehouse number)

Search window

A very used key in eKEPLER is F9. This key is used to activate the search window. In catalogs it is activated in the first identifier field (in the ID field). Pressing F9, a window like the following will appear.



The operation of this screen is as follows:

1. Enter a word or string of text to search in the Search field. When extended search is activated, the search will be done in the ID and in the description. If extended search is deactivated, you will have to choose where to search (if in code or description)
2. If you want to see everything in the catalog, the search field is emptied. To empty the field you can use the space bar
3. Once the word has been entered or the field has been emptied, press the Enter key.
4. The search results will be displayed. By clicking on one of the records, it will position you in the information of that record.

Operation Screen

The operation screens in eKEPLER allow the user to capture all the operations that occur in a company, operations such as invoices, collections, payments, etc. Using this screen, a user has to enter or type the information being required, such as, customer ID, amount, date, etc., and the ERP generates the rest of the process in automatic. All the validations required by document are automated in each operation page, so the ERP will not create the eKEPLER document if important information has not been entered by the user.



eKEPLER Start up guide

Operación / Sales

General data

Branch: CASA MATRIZ
Warehouse: Almacén Principal
Doc. Group: Direct Invoice
Doc. Type: Ventas en general

Document

CONSULT

Number: 0000006
UD0501-0000006
Date: 08/13/2019

Detail

Customer: CLI-003
EIN: AAAA010101AAA
Previous doc.:
Previous items:

Discounts: 0 0 0
Sales agent: Juan Francisco Castro
Currency: PESOS
Ex rate: 1.0000
Reference:

SERVICLEAN
Av. universidad No. 450
Universidad
México D.F. 65893

Item	Qty	UOM	Price	Discount 1	Amount	Description
1	PROD-008	10 PZA	1,129.00		11,290.00	Cabezal HP 11 Negro
2	PROD-010	5 PZA	2,549.00		12,745.00	Tóner Xerox 106R036 Cyan
3						

Credit limit: 0.00
Customer balance: 20,088.02
Available credit: -20,088.02

Subtotal: 24,035.00
Discount: 0.00
Freight: 0.00
Subtotal: 24,035.00
Tax 1: 3,845.00
Tax 2: 0.00
Total: 27,880.00

Term: 0 Payment Date: 08/13/2019
Delivery time:
Commercial terms: Pago de contado
Ship to:
Shipment date:
Comments:

Invoice Screen

On Screen Consulting

Customer sales - www.ERPkepler.com - C:\KE\LABCOM\

File Edit View Help

Address: /127.0.0.1:1800/langEng/cxconpan/vc.kpl

Executive analysis

- Senior management
- General management
- Sales
 - Statistics by customer
 - Sales by customer per month
 - Sales by customer
 - Customer sales by categories
 - Sales by categories
 - Profit by categories
 - Client profit by categories
 - Profit by categories per month
 - Profit by customer
- Inventory analysis

Financials

Operations

- Sales and distribution
 - Sales
 - Quotes

Information

Branch: CASA MATRIZ
Currency: PESOS MEXICANOS
Customer:
Month to analyze: July
From: 08/13/2019
To: 08/15/2019

Branch	Customer	CustomerName	No.	Description	Date	Currency	UOM	Sales w/Tax	Cost of sale	Profit	Referen
1	01	CLI-001	JUMEX MEXICO	0000002	Ventas sin garantia	08/13/19	PESOS	7,429.00	0.00	7,429.00	
2	01	CLI-003	SERVICLEAN	0000006	Ventas en general	08/13/19	PESOS	24,035.00	0.00	24,035.00	
3	01	CLI-003	SERVICLEAN	0000008	Ventas en general	08/13/19	PESOS	23,455.00	0.00	23,455.00	
4	01	CLI-003	SERVICLEAN	0000013	Alta de renta	08/13/19	PESOS	4,534.67	0.00	4,534.67	
5	01	CLI-003	SERVICLEAN	0000014	Alta de renta	08/13/19	PESOS	4,534.67	0.00	4,534.67	
6	01	CLI-003	SERVICLEAN	0000015	Alta de renta	08/13/19	PESOS	4,534.67	0.00	4,534.67	
7	01	CLI-003	SERVICLEAN	0000016	Alta de renta	08/13/19	PESOS	4,534.67	0.00	4,534.67	
8	01	CLI-003	SERVICLEAN	0000017	Alta de renta	08/13/19	PESOS	4,534.67	0.00	4,534.67	
9	01	CLI-003	SERVICLEAN	0000018	Alta de renta	08/13/19	PESOS	4,534.67	0.00	4,534.67	
10	01	CONTADO	Cliente de Mostrador	0000007	Venta de mostrador	08/13/19	PESOS	1,129.00	995.00	134.00	
11	01	P-005	Dell México	0000003	Venta con garantia	08/13/19	PESOS	23,455.00	0.00	23,455.00	123456
12											
								106,711.02	995.00	105,716.02	

Sales by customer by month.

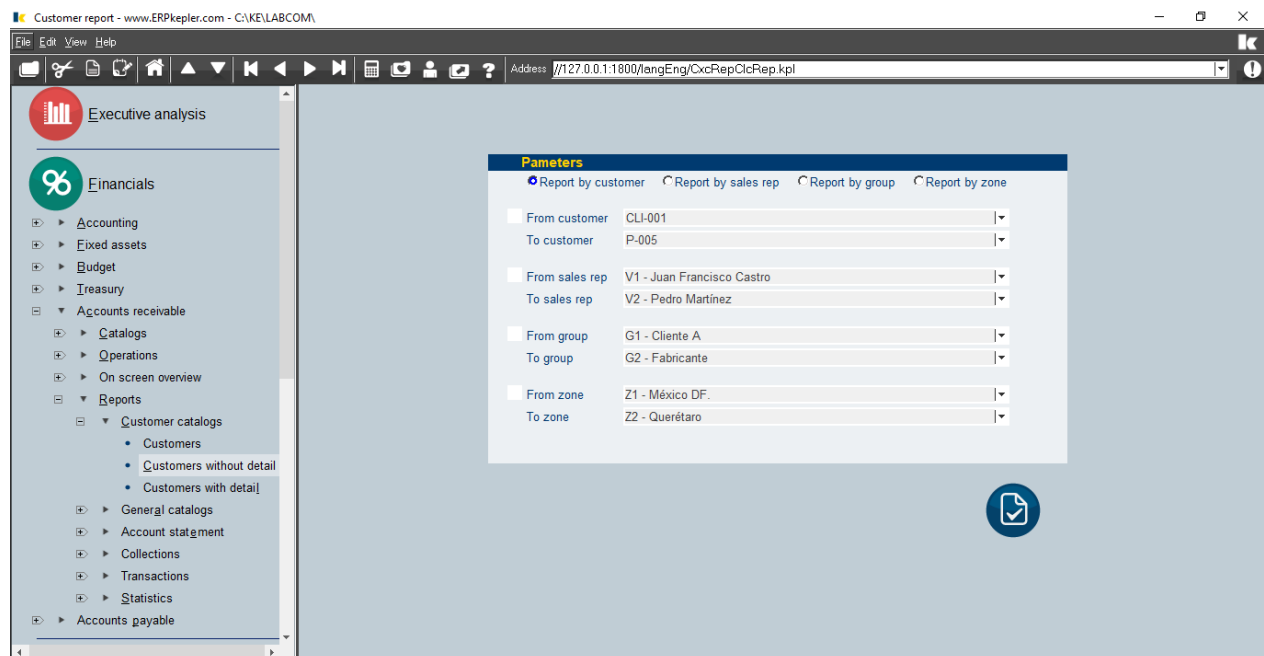
The on-screen consulting pages show certain information based on the criteria entered by the user. The information is shown when the user clicks on the EXECUTE button, located on the upper right hand side of the screen.

The user can move around the grid or table, using the scroll bars, and he can re-order any information in decreasing or increasing order by placing the mouse pointer on a certain column and clicking the right button of the mouse. In certain on-screen consulting pages some columns and rows are fixed, this means that even when you move the scroll bars these columns will not move in order to facilitate the viewing of the information on the grid.

All the On-Screen consulting pages have their own criteria fields. If a criteria filed is left with a blank the search is executed without using this criteria, to leave a certain criteria or field in blank you have to press the SPACEBAR on the field.

On certain fields you can drill down to view more detail information. This drill downs can be executed by pressing <F10> on the field in the grid, or by placing the mouse pointer on the field in the grid and double clicking the left button of the mouse. When entering a page or option by drill down, you can return to the previous page by pressing ESC or simply closing the option.

REPORTS



The screenshot shows a web browser window with the address bar displaying `http://127.0.0.1:1800/lengEng/CxcRepCicRep.kpl`. The interface includes a sidebar menu with categories like 'Executive analysis', 'Financials', and 'Reports'. The 'Reports' section is expanded, showing 'Customer catalogs' with sub-options: 'Customers', 'Customers without detail', and 'Customers with detail'. The 'Customers without detail' option is selected. A 'Parameters' dialog box is open, allowing users to define report criteria. The dialog has four radio buttons for grouping: 'Report by customer' (selected), 'Report by sales rep', 'Report by group', and 'Report by zone'. Below these, there are four sections for defining the report range, each with 'From' and 'To' fields and dropdown menus.

From	To
From customer: CLI-001	To customer: P-005
From sales rep: V1 - Juan Francisco Castro	To sales rep: V2 - Pedro Martinez
From group: G1 - Cliente A	To group: G2 - Fabricante
From zone: Z1 - México DF.	To zone: Z2 - Querétaro

Customer Catalog without detail.

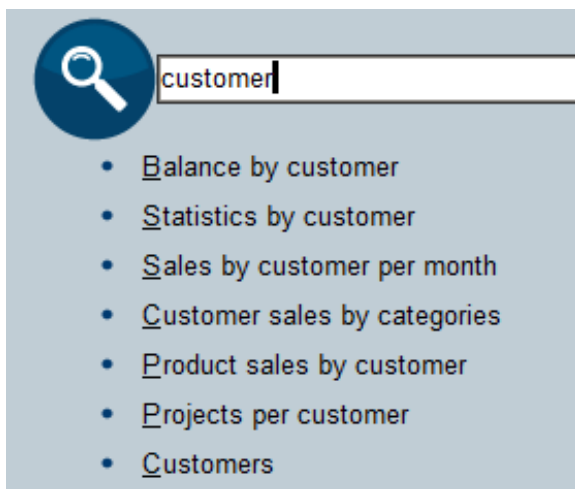
The eKEPLER reports allow the user to generate any report by certain criteria. The radio buttons define how the information will be grouped, in the example above the information can be grouped by customer, zone, group or salesRep.

The checkbuttons are used to limit the search or the information shown in the report by certain criteria. In the example above the information can be filtered by customers, zones, groups and sales representatives. In order to use a certain criteria, you must choose the corresponding check box, and define the criteria needed. You can activate as many criteria fields as you need, for example you may choose to generate the report by certain sales rep and by certain zone.

To generate the report the user has to click on the EXECUTE button, located on the upper right side of the screen. Once the report is shown on screen, you can choose to send the report to a printer or to export the report to a text or html file. These options are located on the upper left-hand side of the report, once the generated report appears on the screen. By default, all the reports are printed on a custom letter size, you change these parameters on the Configure Page located on the File Menu.

Searcher

At the end of the main menu's tree you will find the searcher. To edit, press F2 or in the Edit menu's>search. You have to type the name of the eKEPLER option you are trying to find or the part of the description that appears in the menu tree. By double clicking on a search result, it will place you in the module where this option is located.



Example of a search for the word customers



ANEX

Easy Access Keys

Easy Access Key	Description
CTRL + TAB	Allows the user to change the current option.
TAB	Moves to the following filed
SHIFT + TAB	Moves to the previous filed.
Alt + letter underline.	Places the cursor on the field that is indicated by the letter underline.
Space bar	Erases the field.
Home	Places the cursor on the first filed of the screen.
End	Places the cursor on the last filed of the screen.
Backspace	If the field has information, this erases the last letter on the field.
F2	This places the cursor at the end of the text on a certain field
F5	Reloads page
F9	Shows the search screen. This is used when searching for certain ID such as customers, items, suppliers, etc... This key works only on certain fields that allow this search to happen.
F10	Is used to drill down for more detail information on a certain field. This can be use on grids or tables, and also on certain fields such as customer, suppliers and items ID's.
CTRL + C	Copy
CTRL + V	Paste.

Easy Access keys for catalogs

PgUp	Go to the Previous Record.
PgDn	Go to the next Record.
CTRL+ DEL	Delete the current record.
CTRL + HOME	Go to the first record.
CTRL+ END	Go to the last record.

Oher easy access keys

CTRL + ↓	Used on combo boxes, this show the content of a combo box.
CTRL + ↑	Used on combo boxes, this hides the content of a combo box.
Shift + ↓ or Shift + ↑	Opens a list.