e-ER Planner

Organization Module

Organization User Guide

Version 5.0 Beta 6

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Introduction

This user guide aims at giving you the information required to work with "Organization Section" of "Organization". This user guide can be downloaded from "Organization Help" screen shown in **Figure 2** which is accessible from "Organization → Help" menu as shown in **Figure 1**.
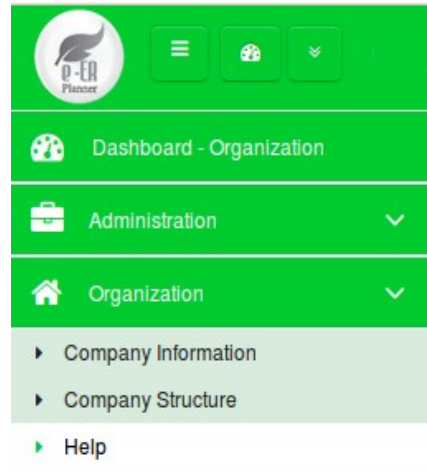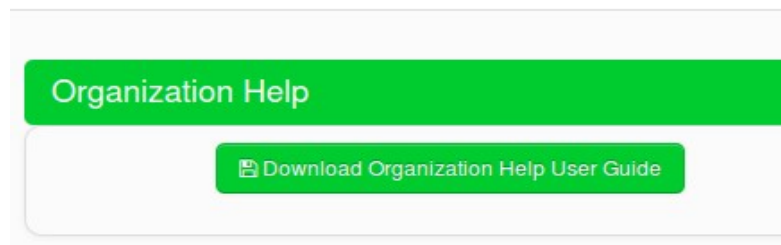

Figure 1

Figure 2

Top Navigation Bar

Toggle Left Menu

Open/Retract System Modules

Organization ☐ Default Module

Super_Admin ▾

System Dashboard

Default Module

Current Module

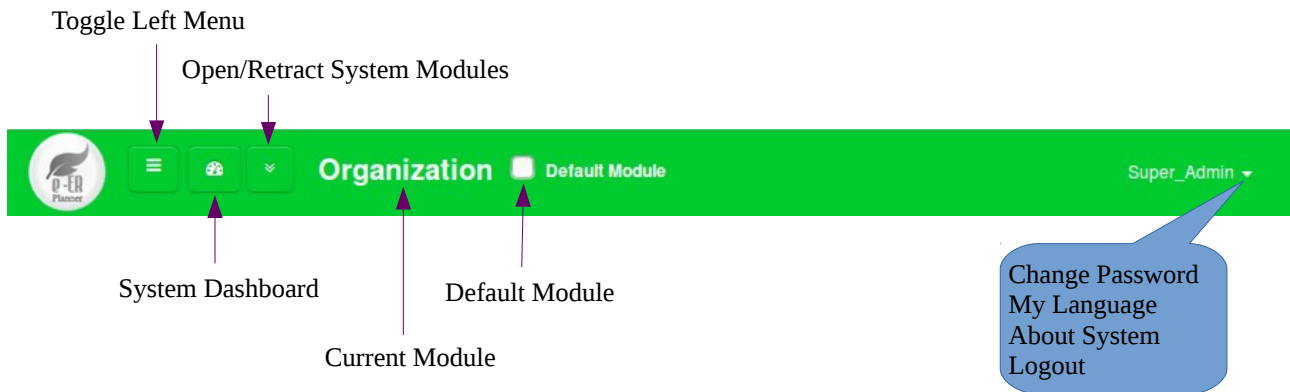Change Password
My Language
About System
Logout

Figure 3

- **Toggle Left Menu** : Show/hide left menu

- **Open/Retract System Modules** : Open/retract system module dashboard. Previous screen preserves if user does not select any module.

- **System Dashboard** : Opens the system modules dashboard. Previous screen does not preserved.

- **Current Module** : Shows the current module that user has selected.

- **Default Module** : Selecting current module as default module will allow to go directly to that module on login to the system.

Company Information

Company information can be added in the screen shown in **Figure 4**. "Company Information" screen is accessible from "Administration Module → Company Information" menu.

- "Company Name", "E-mail", "Primary Phone Number" and "Address" fields are mandatory when adding company information.

- Country code of telephone numbers and fax number can be selected by accessing the country flag .

- There should be a space between country code and telephone/fax number. **Ex :** +94 0111234567.

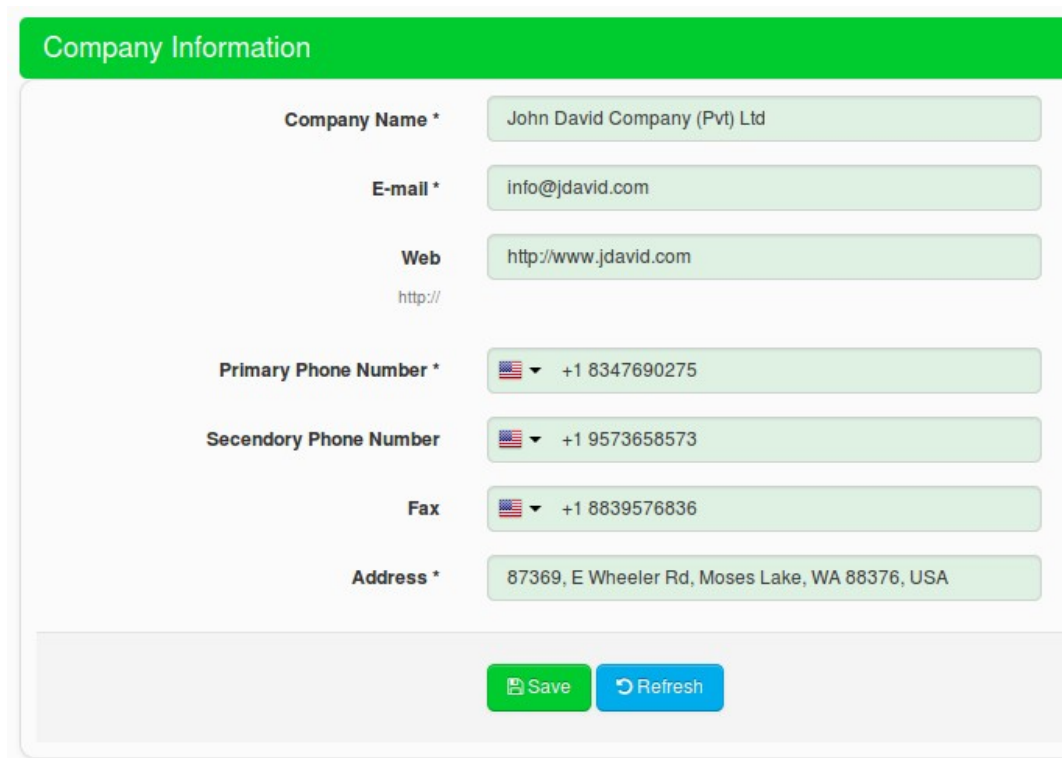- Company information is shown on system print outs (Reports, Invoice etc.).

Figure 4

Company Structure

Company organization structure can be created as shown in **Figure 5**. "Company Structure" screen is accessible from "Administration Module → Company Structure" menu.
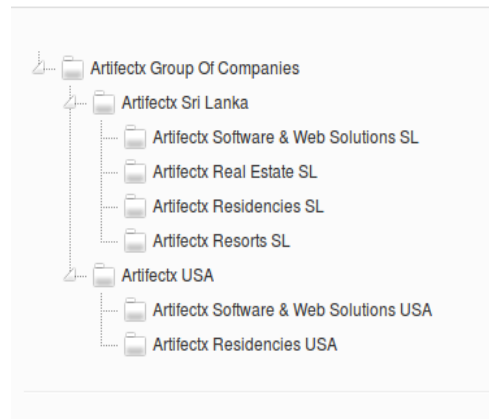

Figure 5

- In order to add the company structure, right click on the top company name.

- A new menu will be displayed as shown in **Figure 6**.

- When you select "Add" option from the menu, a new screen will be displayed to add the company name.

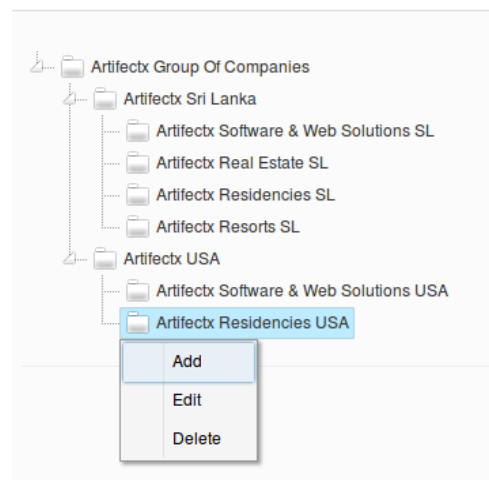- Company structure can be arranged by dragging and dropping company names in the structure.

Figure 6