e-ER Planner

Organization Module

Admin 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 “Administration Section” of “Organization”. This user guide can be downloaded from “Admin Help” screen shown in **Figure 2** which is accessible from “Administration → Help” menu as shown in **Figure 1**.

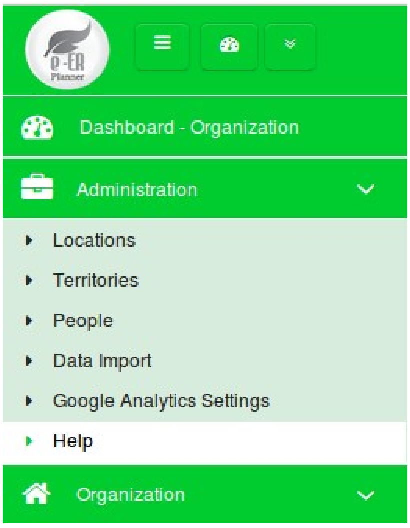


Figure 1

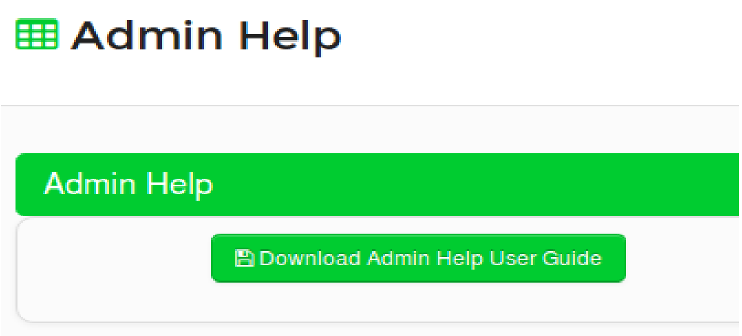


Figure 2

Top Navigation Bar

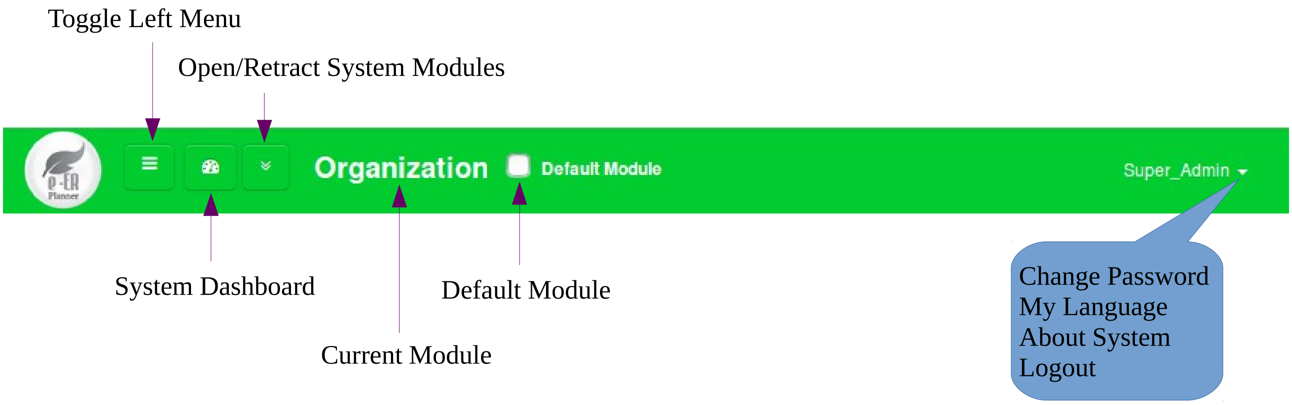


Figure 3

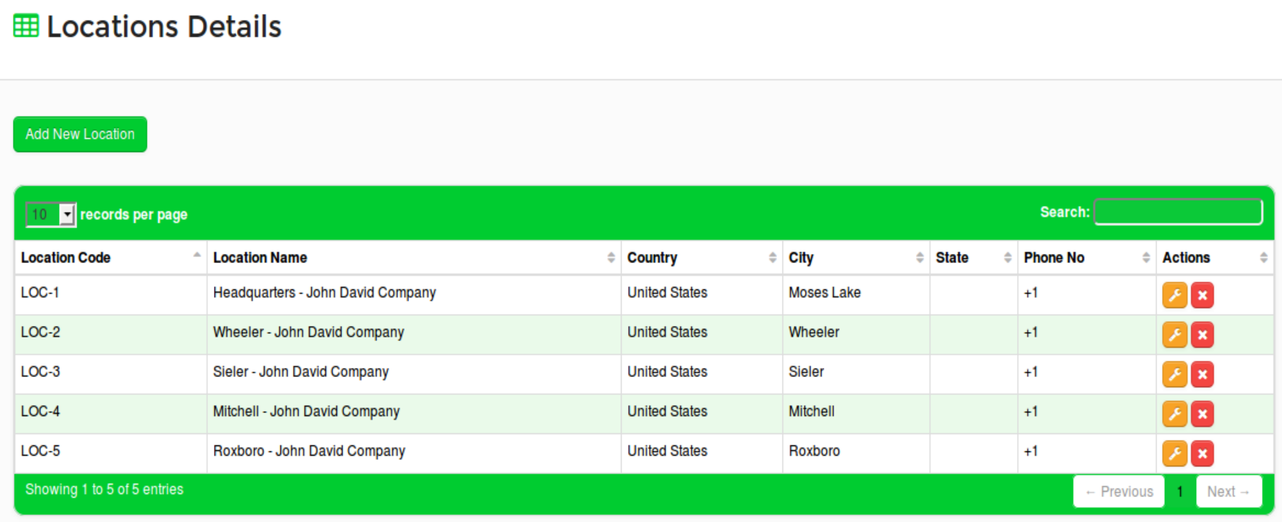
- **Toggle Left Menu** : Show/hide left menu
- **Open/Retract System Modules** : Open/retract system module dashboard. Previous screen preserves if user does not select any module.
- **System Dashboard** : Opens the system modules dashboard. Previous screen does not preserved.
- **Current Module** : 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.

Locations

Physical locations can be added in the system from “Administration Module → Locations” menu.

- Location list is displayed in the system as shown in **Figure 4**.
- Once locations are defined in the system, can be specified for warehouses and agents so that their locations can be tracked.
- A new location can be added by clicking the “Add New Location” button shown in **Figure 4**. A new form will be displayed on the screen to add the location details as shown in **Figure 5**.
- “Location Code” and “Location Name” are mandatory fields when adding locations.
- Country code of telephone numbers can be selected by accessing the country flag .

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



Locations Details

Add New Location

10 records per page   Search:

Location Code	Location Name	Country	City	State	Phone No	Actions
LOC-1	Headquarters - John David Company	United States	Moses Lake		+1	
LOC-2	Wheeler - John David Company	United States	Wheeler		+1	
LOC-3	Sieler - John David Company	United States	Sieler		+1	
LOC-4	Mitchell - John David Company	United States	Mitchell		+1	
LOC-5	Roxboro - John David Company	United States	Roxboro		+1	

Showing 1 to 5 of 5 entries   ← Previous 1 Next →

Figure 4

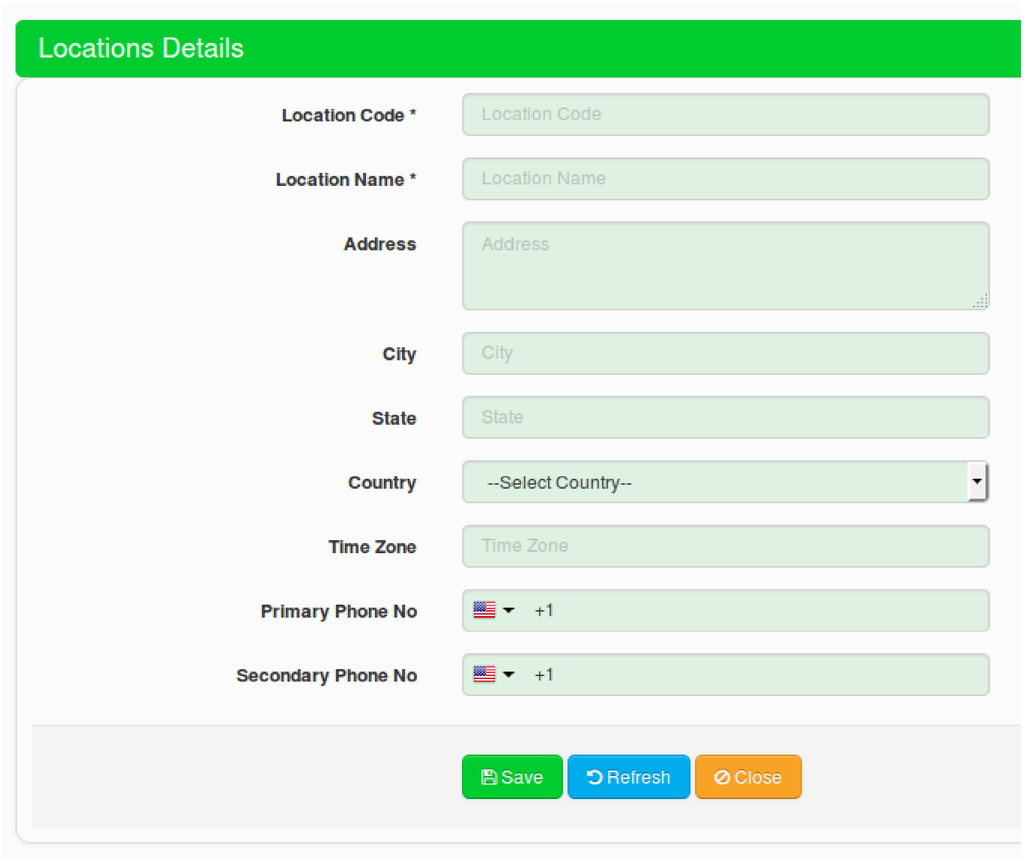

Locations Details
Location Code *
Location Code
Location Name *
Location Name
Address
Address
City
City
State
State
Country
--Select Country--
Time Zone
Time Zone
Primary Phone No
+1
Secondary Phone No
+1
Save
Refresh
Close

Figure 5

Territories

If a business organization needs to track their sales information territory wise, users can add the territory information on the Territories screen and use in sales information. Territories can be added in the system from “Administration Module → Territories” menu.

- Territories list is displayed in the system as shown in **Figure 6**.
- A new Territory can be added by clicking the “Add New Territory” button shown in **Figure 6**. A new form will be displayed on the screen to add the Territory details as shown in **Figure 7**.
- “ Territory Code” and “ Territory Name” are mandatory fields when adding locations.

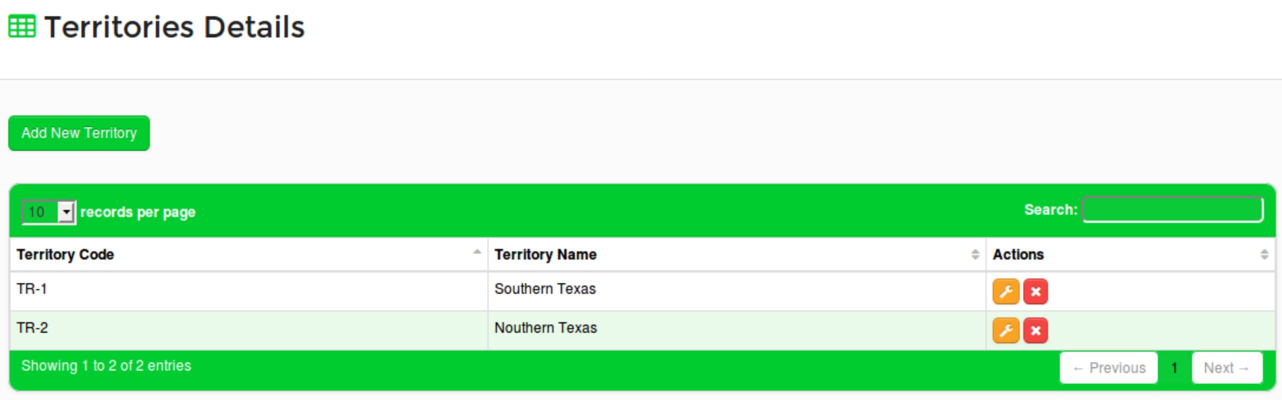


Figure 6

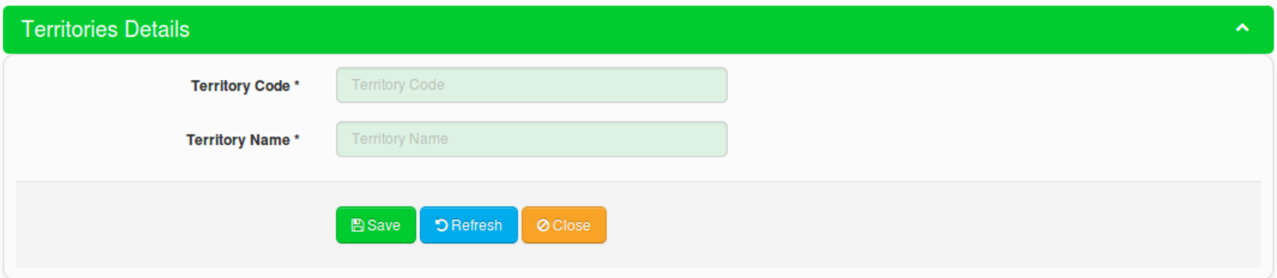


Figure 7

People

There are many people involved when managing an ERP system. Such people information can be stored in the system so that they can be selected when adding transactions. People can be added in the system from “Administration Module → People” menu.

Following people categories can be seen in people screen as shown in **Figure 8**.

1. Supplier
2. Agent
3. Customer
4. Sales Rep
5. Driver
6. Member
7. Employee

- By clicking on “Add New People” button you can add new people into the system. A new form will be displayed on the screen to add the people details as shown in **Figure 10**.

  Note : For each people type there can be additional fields.

- To see a list of people under each category, click on the icon of each category as shown in **Figure 8**. People under the selected category will be shown as shown in **Figure 9**.
- Once people are defined in the system, can be specified in following transaction screens under “Finish Good Inventory Module”, Accounts Manager Module, User Roles Manager Module, Services Manager Module etc.
  - Good Receive Note
  - Good Dispatch Note
  - Good Issue Note (Invoice)
  - Good Return Note
  - Sales Invoice
  - Sales Return
- “People Type”, “People Code” and “People Name” are mandatory fields when adding people.
- 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.

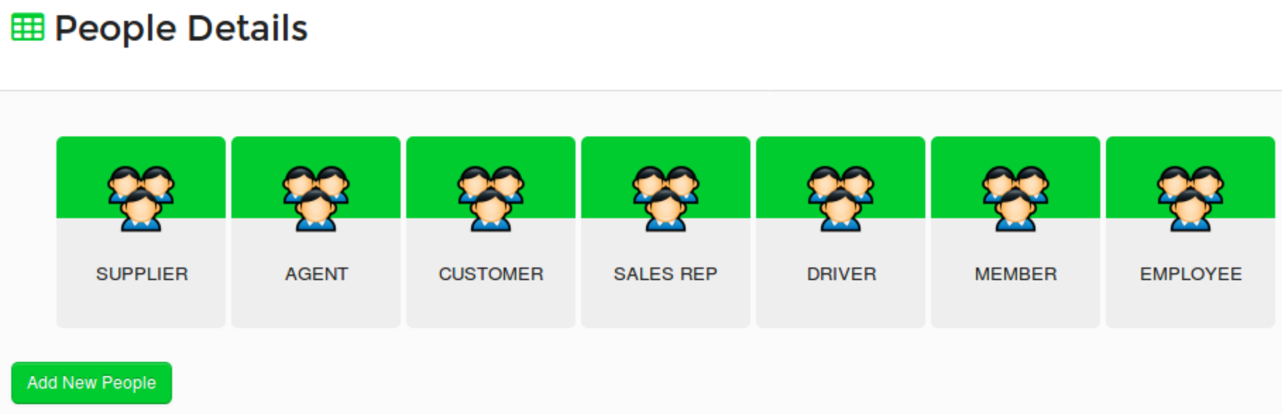
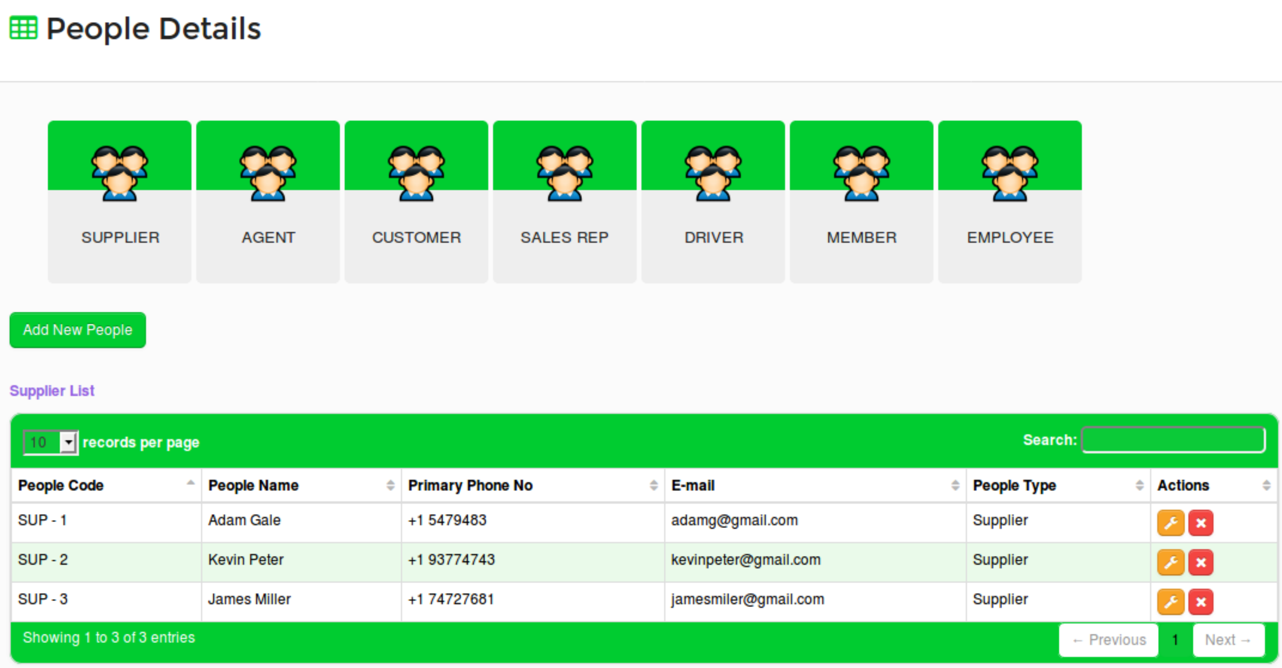


Figure 8



People Code	People Name	Primary Phone No	E-mail	People Type	Actions
SUP - 1	Adam Gale	+1 5479483	adamg@gmail.com	Supplier	
SUP - 2	Kevin Peter	+1 93774743	kevinpeter@gmail.com	Supplier	
SUP - 3	James Miller	+1 74727681	jamesmiler@gmail.com	Supplier	

Figure 9

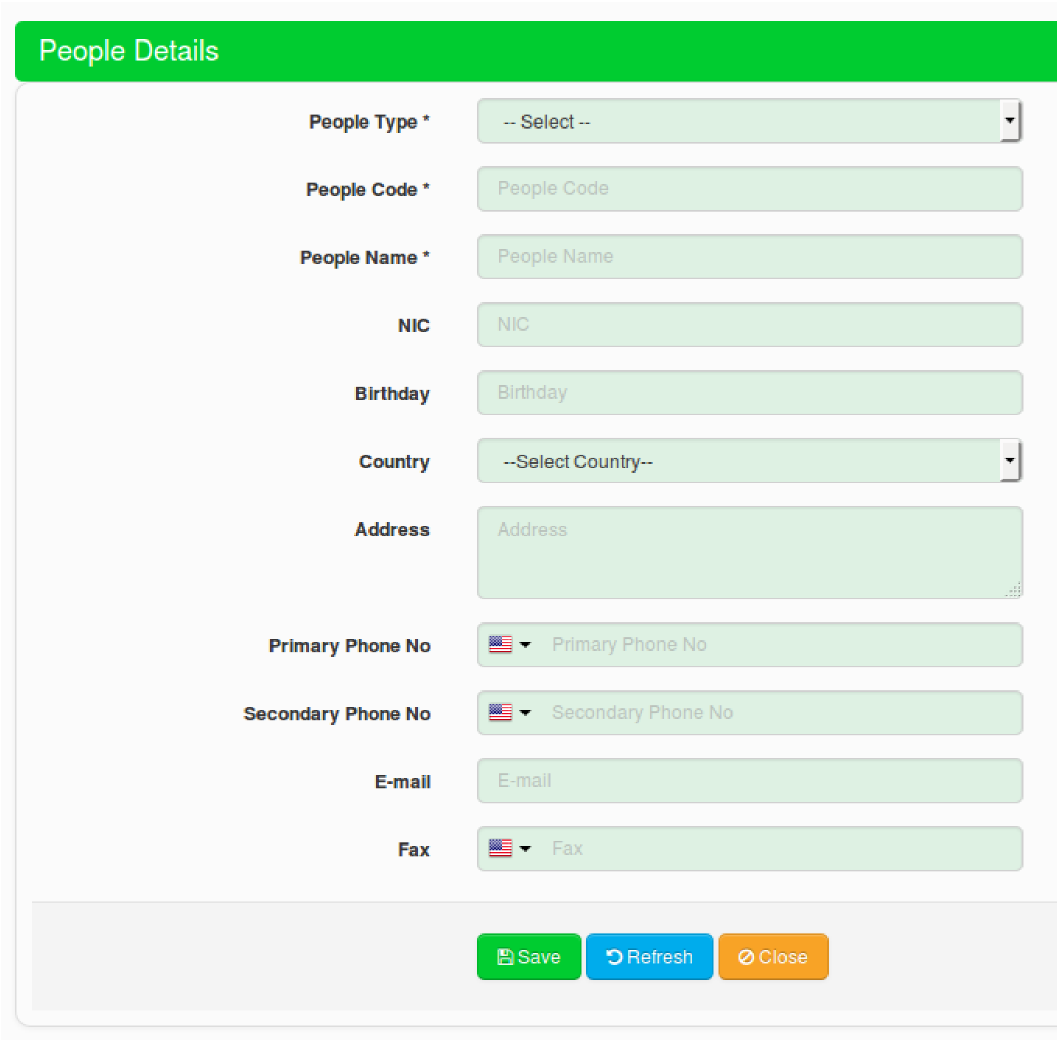

People Details
People Type *
-- Select --
People Code *
People Code
People Name *
People Name
NIC
NIC
Birthday
Birthday
Country
--Select Country--
Address
Address
Primary Phone No
Primary Phone No
Secondary Phone No
Secondary Phone No
E-mail
E-mail
Fax
Fax
Save
Refresh
Close

Figure 10

- After adding a new person, user can upload documents for that person by selecting the person from a people category. Users can click on “Upload A Document” button to upload a new document as shown in **Figure 11**.

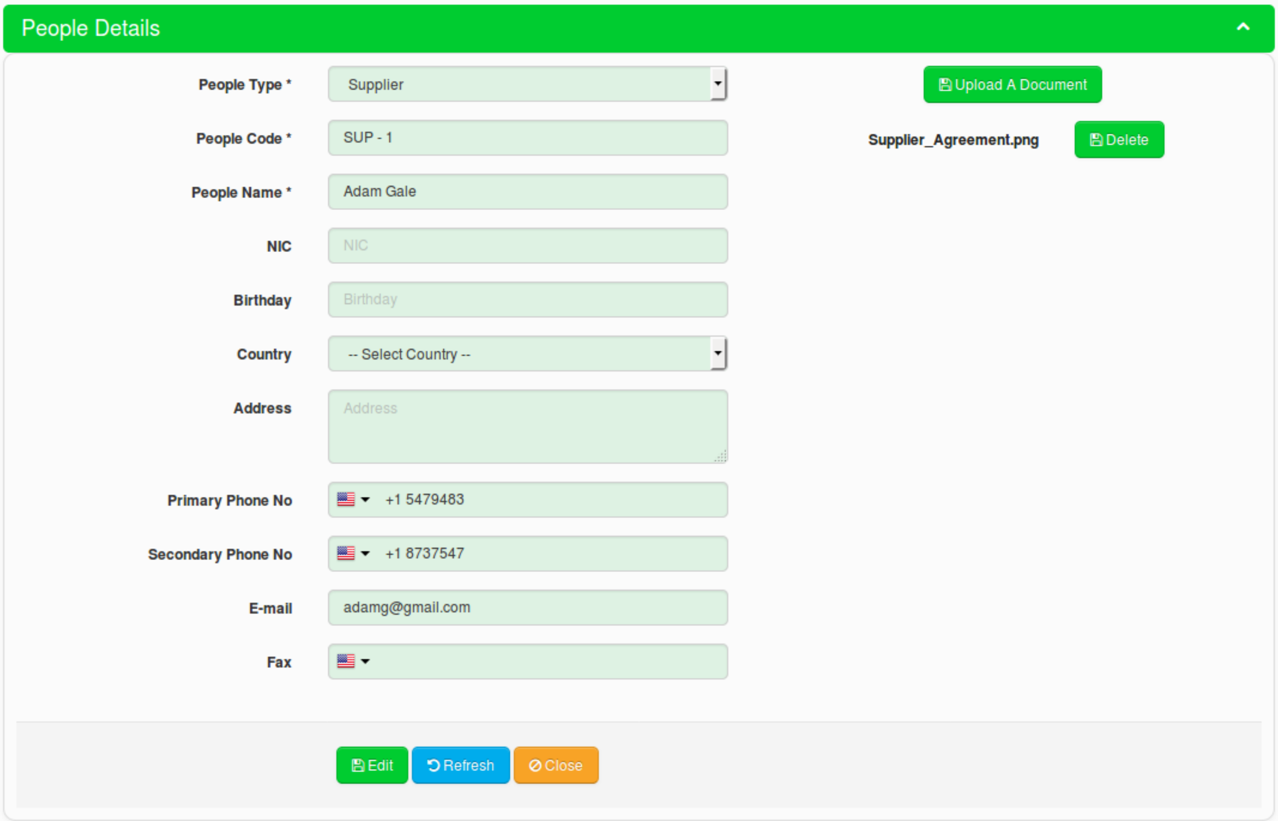


Figure 11

Data Import

e-ER Planner provides master data to be imported during system implementation. **Figure 12** shows the data import tool of Organization Manager.

Follow the following instructions to import master data.

1. Download the organization master data import Excel workbook by clicking on "Download" button in "Download Organization Master Data Import Excel Workbook" section shown in **Figure 12**.
2. You can download the data import user guide by clicking on "Download Data Import Workbook User Guide" button in "Download Organization Master Data Import Excel Workbook" section shown in **Figure 9**. You should refer the user guide for detail instructions.
3. After filling the data import Excel workbook, upload the workbook by clicking on "Browse" button in "Upload Organization Master Data Import Excel Workbook" section shown in **Figure 12**.
4. System will verify your data in Excel template while uploading and it will show an error message if your data is not accurate. Click on "Download Data Import Workbook Error Log File" button in "Upload Organization Master Data Import Excel Workbook" section shown in **Figure 12** to download the error log file.
5. If your data is accurate, the system will show a success message after uploading the Excel workbook.
6. Finally use the options given in "Import Data" section shown in **Figure 12** to import master data.

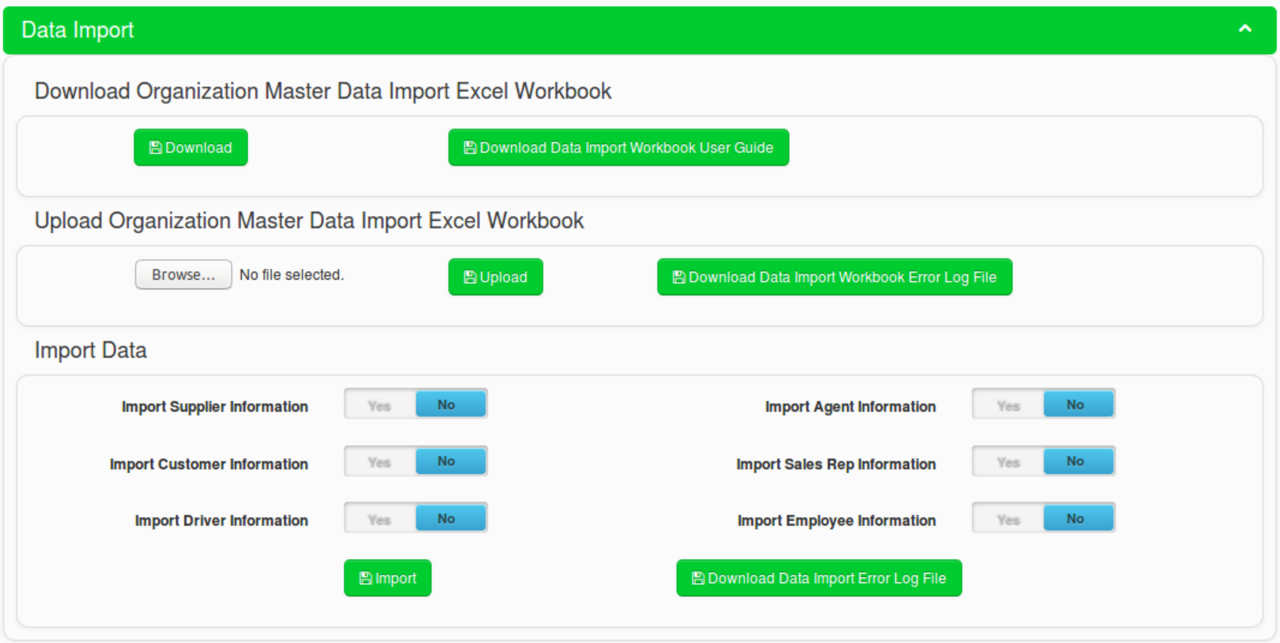


Figure 12

Google Analytics Settings

e-ER Planner allows system administrator to register the system with Google Analytics to track system access details of the users. Specify the configuration settings in screen shown in **Figure 13** so that system will upload required information to the registered Google Analytics account of the company.

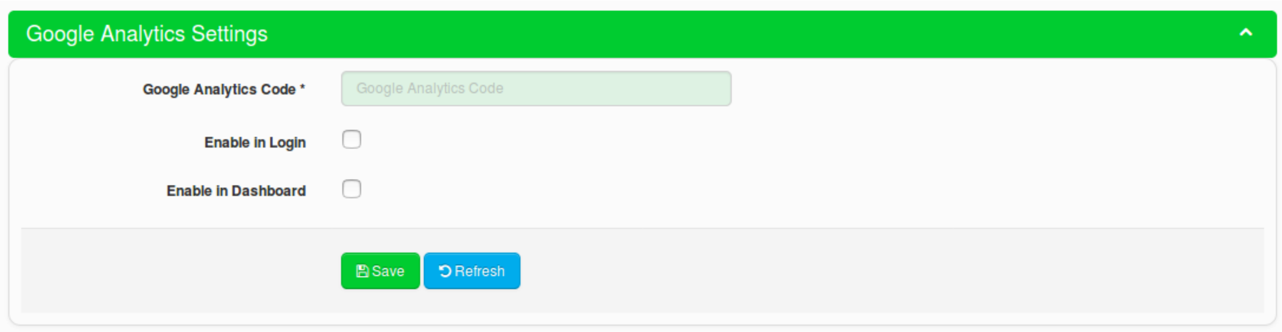


Figure 13