# BENVIN SOLUTIONS LIMITED

## Website Documentation: Section 1

*Prepared by: Kevin Nyongesa & Jane Makumi*

### Introduction

As you may have noticed, the name on the title of this document is different from what you may be familiar with. This was a decision made by the higher ups. So it's not Pality International Ltd. but **Benvin Solutions Ltd**.

This document will just give a brief view of the work expected. We will give details for only one account so that you can begin working on it as we send documentation for the other accounts.

### Vital Notes

This unlike the previous document, this document should be followed as closely as possible. Especially with regards to the layouts presented in the figures below.

Any questions should be immediately conveyed to the WhatsApp group that will be created for this project in order for it to be clarified.

If need be, one member from your team may volunteer for a paid two-week internship at the business premises in order to observe and get a better understanding of how the business functions.

Any suggestions about changes to be made have to be approved before they are implemented so that the project may move as quickly as possible with minimum flaws.

Please note that every step of our conversations with regards to this project will be recorded as part of the company's documents. Therefore Benvin Solution's primary contact person for this project is Kevin Nyongesa. The Technical Team's primary contact person is Alexander Oguso.

*Every member of the technical team should review this document carefully and fully understand the expectation that is required of them before agreeing to participate in this project.* We highly advice that should any member of this team feel insufficient for the task to speak up in order to avoid any damage being inflicted on the project after commencement.

This project after completion will become property of Benvin Solutions Limited. However, the source code shall remain property of the technical team and there shall be no conflict of interest should the team decide to commercialize it on condition that nothing of the final commercialized product will resemble www.benvinsolutions.com except for its functionality.

### www.BENVINSOLUTIONS.com

This document is mainly pictorial. We would however, like you to clearly understand how data is being injected into the web app, what of that data will be displayed, where it will be displayed, how it will be displayed and how many times it will be displayed across the whole system.

This is in essence, an Internal Control System (ICS) and therefore it should function as that.

As a suggestion, I strongly feel that the use of dialogue boxes rather than complete new webpages would ensure the site remains responsive and fast and reduce the amount of coding documents you require to create. An example of a site that uses this is www.helb.co.ke.

### *Accounts in the System*

There are several accounts in the system. All log in credentials should be stored in the director's account with the ability to edit or delete.

The director's account is to be well secured from easy access with a good password.

The following are the accounts that exist in the system:

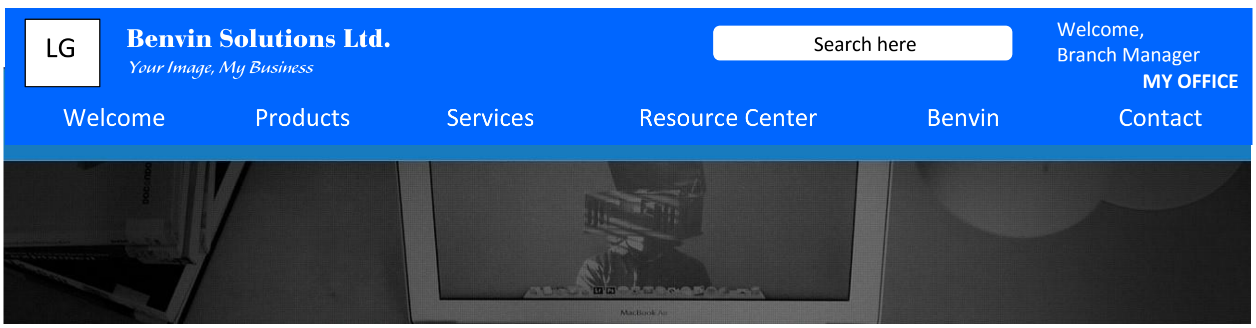
| | | |
|---|---|---|
| • Director | Only One | Created by the tech team as the dashboard account |
| • Shareholders | As many as are requested from the site and are approved by the accountant | Requested from the main site by the interested shareholder and the request is to be approved by the accountant of the head branch before the account is created |
| • Branch Managers | One per branch | Created from the director's account |
| • Branch Marketers | One per branch | Created from the director's account |
| • Branch Administrators | One per branch | Created from the director's account |
| • Branch Accountants | One per branch | Created from the director's account |
| • Junior Staff and Supervisors | As many as are created | Created from the Branch Administrator's Account |
| • Clients | As many as are created | Created by the clients themselves from the website OR by any staff member who adds a client from their own portal. |

### *General Knowledge about these Accounts*

There are a few thing you need to know about this accounts and how they relate with each other before diving into the details:

- The director's accounts is, in essence, the dashboard for the whole system. Information goes into the account before it is then pulled for display by other accounts. It is also the place where password reset for all other accounts can be done.
- All staff accounts should be able to chat with each other.
- Shareholder accounts, unlike other accounts, can only chat with the branch manager and assign tasks to them.
- Clients can only chat with their ROs (Relationship Officers) and staff how decide to contact them
- Live Chat is anonymous and has its history is not recorded after login out. (Will elaborate more.)

- The assignment of ROs to clients after they create their own account will be random based on the location of the client when creating the account. However if a staff member adds a client, the staff member becomes the default RO.
- ROs is just a job description. Not an account. All members of staff are ROs except for the Accountants.
- ROs can be shifted only by the Branch Administrators.
- We will have a help link below that refers to the resource center to give clients access to FAQs as well as other helpful information to them.
- We should have an interactive tour of the site once a client logs in for the very first time. An example of a good site for a tour example is www.gmail.com
- Clients and Shareholders will use their personal and company email addresses respectively as the username for their log in. Staff on the other hand will use their staff ids.
- Clients will access their account through www.benvinsolutions.com whereas, Shareholders will access their accounts through www.benvinsolutions.com/shareholder wheras, Staff will access their accounts through www.benvinsolutions.com/staff.
  This will act as a filter for the log in credentials but the outlook should still look the same.
- I emphasize that as much as you can to make use of Dialog Boxes as compare to new webpages.
- All accounts will look the same after log in. The difference will come in when you click on "My Office" See below,




{The changes in the navigation section need to be effected in the way you see in the picture above as comparted to what was there before.}

In light of the above information, And with some more information that will follow ahead, I won't describe how the director's account looks like. What is expected of you is to use you understanding to create a clean well-arranged director's account that shows all the information from all the accounts as I explained earlier.

Let's now dive into the details of the other accounts:

### *Branch Manager*

The objectives of this account will be as follows:

- The manager should be able to write down activities that he or she needs to do and add their deadlines.
- The manager should be able to assign duties to other staff members

- The manager should be able to converse with his or her clients; both the ones that he or she personally handles (as an RO) and the overall clientele base
- The manager should be able to converse with the staff
- The manager should be able to converse with shareholders
- The manager should be able to view the work of being carried out by all the staff
- The manager should be able to view financial, administrative and marketing reports and make decisions based on them.
- The manager should be able to contribute to educating both the clients and staff with useful information about certain topics in line with the company through the resource center.
- The manager should be able to view all the orders made and their progress
- The manager should be able to record any money received or paid on behalf of the government
- The manager should be able to add an order from a client thereby creating their account for them

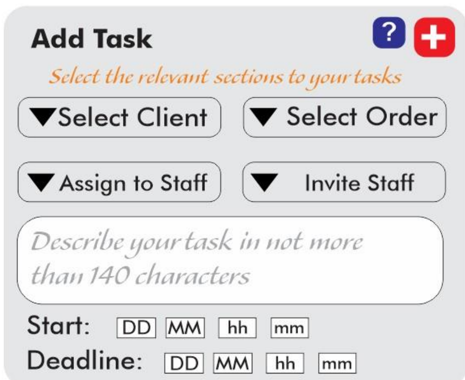
Therefore we will begin by giving a pictorial description of all this objectives and elaborate further on them:


**Note: Some of the items to be discussed in this account will apply across all other accounts hence will no further elaboration will be necessary**

**The left and right sections are permanent and fixed (not scrollable) the only section in between the two is scrollable.**

- Tasks

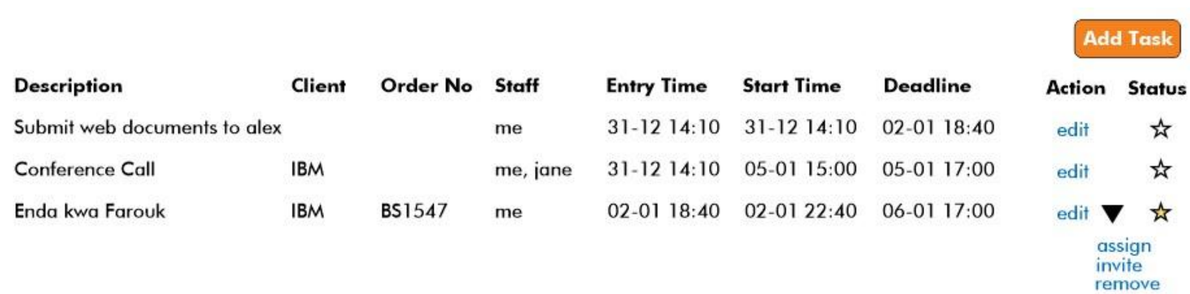
The tasks page is a page meant to be used by every staff member to communicate to the rest of the organization of what activities they are undertaking. The left section is more like an interactive extension of this page. Each staff member will note down the work they are doing or are scheduled to do from the “Add Task” button. A dialogue box should pop up that looks like this:




Staff will then add whatever is relevant to them. Staff should be able to select an order number from the list if it’s an order they are working on, or a client if they are sorting out a particular issue with a client, or simply just add a short description of whatever task they are working on if it’s not related to either.

Staff should be able to assign a task to a member staff only if they are supervisors and above but all staff should be able to invite their colleagues to work on a task together. This means that the task will appear on both accounts.

The task page will now tabulate all this tasks as follows:



Add Task

| Description | Client | Order No | Staff | Entry Time | Start Time | Deadline | Action | Status |
|---|---|---|---|---|---|---|---|---|
| Submit web documents to alex | | | me | 31-12 14:10 | 31-12 14:10 | 02-01 18:40 | edit | ☆ |
| Conference Call | IBM | | me, jane | 31-12 14:10 | 05-01 15:00 | 05-01 17:00 | edit | ☆ |
| Enda kwa Farouk | IBM | BS1547 | me | 02-01 18:40 | 02-01 22:40 | 06-01 17:00 | edit ▼ assign invite remove | ☆ |

To elaborate a little bit on the Action column, there are four actions that can be done to a task. Either it is edited, assigned to one of the junior staff, invite other stuff to assist with the task, or removed.

If an action is chosen then the dialogue box (shown above) appears to help do all that editing and additions or assignments.

A removed task will not completely delete itself but will instead go to the archives. An old task (over 60 days after deadline; whether complete or incomplete) will also go to the archives.

A task whose deadline is about to elapse should be shown in the live feed.

You don't have to use stars at the status part. What's important is that we can distinguish a task that is completed and a task that is not completed. Whatever method chosen though, keep in mind that a task can be marked as complete from here. So methods like using the whole word may not be appropriate.

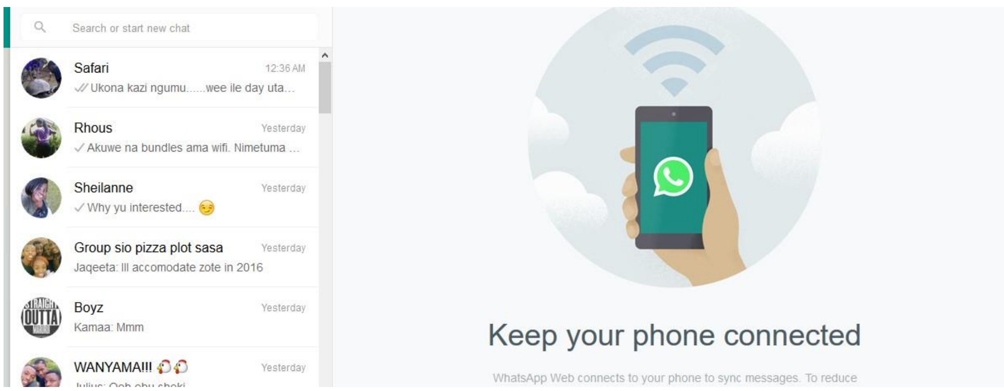
- My Clients and Shareholders

This two pages are simply more like chat pages. Example being the Facebook Messenger.

This is a place where the account holder will have a list of all the shareholder and all clients who he is RO to and whenever they converse, the chat records will be stored there for a period of only 6 months (180 days).

No emoji or other socially attractive paraphernalia since it is a business site. However, attachment of any type and size of files should be enable. ***(We need further deliberation into the topic of attachments so that you can elaborate to us its intrinsic nature)***

The chat interface should resemble the following interface:




- Orders

The account holder should be able to view all the orders made in the business and to which branch the orders were posted. Therefore we will also discuss the "Add Order" function. This page will also be tabular in nature showing the following information:

| Order No | Receipt No | Client | Description | LPO No | RO | Order Time | Delivery Deadline | Amount Charged | Balance | % Paid | Status | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| BS1547 | | IBM | 1. Business Cards 2. ... | P0516891C | me | 02-01 14:10 | 02-01 18:40 | KES 40,000.00 | KES 35,000.00 | 13% | Pending | Generate Invoice |
| BS1546 | | Alex | 1. Brochure 2. Laptop.. | | jane | 01-01 14:10 | 05-01 17:00 | KES 60,000.00 | KES 40,000.00 | 33% | In Progress | Generate Invoice |
| BS1545 | | Mbani | 1. Umbrella | 659861450 | me | 30-12 18:40 | 06-01 17:00 | KES 10,000.00 | KES 500.00 | 95% | Invoiced | Generate Invoice |

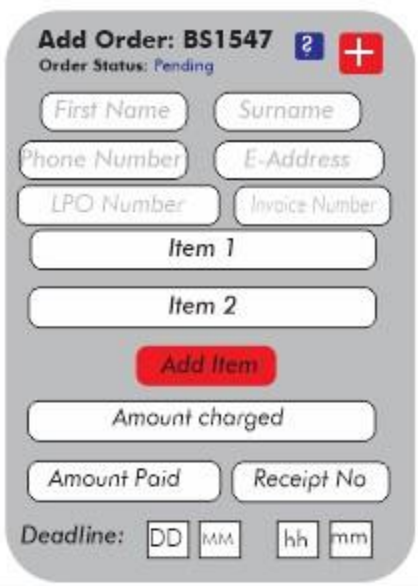
I will discuss about the receipt number when I get to the accountants account. Just to explain all of this columns, the Order no should be generated in sequence automatically an order is recorded, in the format of "BS1234" The starting order number will be BS1000.

Orders can be made in two ways:

1. Through the client while shopping. The fields that will be automatically be field will be the client field (by the clients screen name), the description (the clients shopping cart) the RO (since every client with an account will have an RO attached to them) and the order time. The client should

only be prompted to write his deadline delivery time then submit. The status of the order at this time will be “Received”. After the submit button is hit, the RO will receive the order through the “Live Chat” page and add the amount to be charged and immediately submit it along with the terms of 40% payment for the order to begin being processed and a 60 for days full payment period after delivery. The client will receive the order through the live chat with the amount charged on the order and “Approve”. The client after clicking on the approve button will be prompted to key in the receipt number for his payment (each client will receive a receipt number from their RO for any payments made to the company). As soon as the accountant validates the payment, the status of the order should change from “pending” to “In progress”. As soon as the work is done and delivered, an invoice can be generated in which the delivery numbers are indicated then printed or sent directly to the clients email (Not that the invoicing and sending should be happening in the site, not from an external party.)The status after invoicing becomes “Invoiced”. When the balance reads 0 then the status changes form “invoiced” to “Cleared”. Every receipt number of payment of an order should be shown on the “Receipt No: column

2. Through the staff portal. (This is where I will discuss the “Add Order” function). An order can also be logged into the system via the staff account. Once a client decides to make an order, then the staff will click on “Add Order” and a dialogue box will appear with the following questions:




After filling all that, the process is just as similar to the one above.

*Next is the “Clients” and “Staff” Pages.*