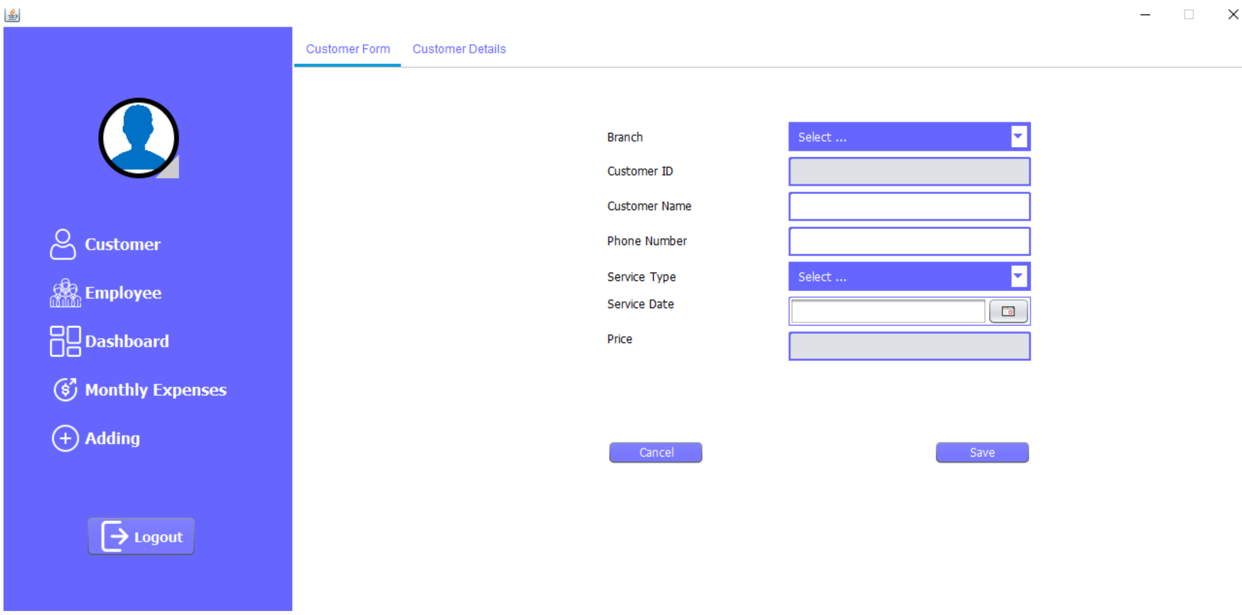
BIZ-Builder User Guide

Contents

Customer Tab

Adding a New Customer:



1 Open Customer Form:
   1.step Open the "Customer Form" in your application.

2 Fill Basic Information:
   1.step Select a branch from the dropdown list.

3 Enter the customer's name and a 10-digit phone number.
   1.step Choose the service type (Shop or Order).
   2.step Pick a service date using the calendar.

4 Optional: Add Discount:
   1.step If there's a discount, enter it in the "Discount" field; otherwise, leave it as '0.'

5 Adding Services:
   1.step If the service type is "Shop" or "Order," you can add services.
   2.step Choose a service from the dropdown list.
   3.step Enter the service price.
   4.step Click "Add" to include the service.

6 Adding Expenses (If Applicable):
   1.step If you've added order services, you can include expenses:
   2.step Choose an expense type.
   3.step Enter the expense cost.
   4.step Click "Add" to include the expense.

7 Total Price:

1.step The total price is automatically calculated based on the selected services, discounts, and expenses.

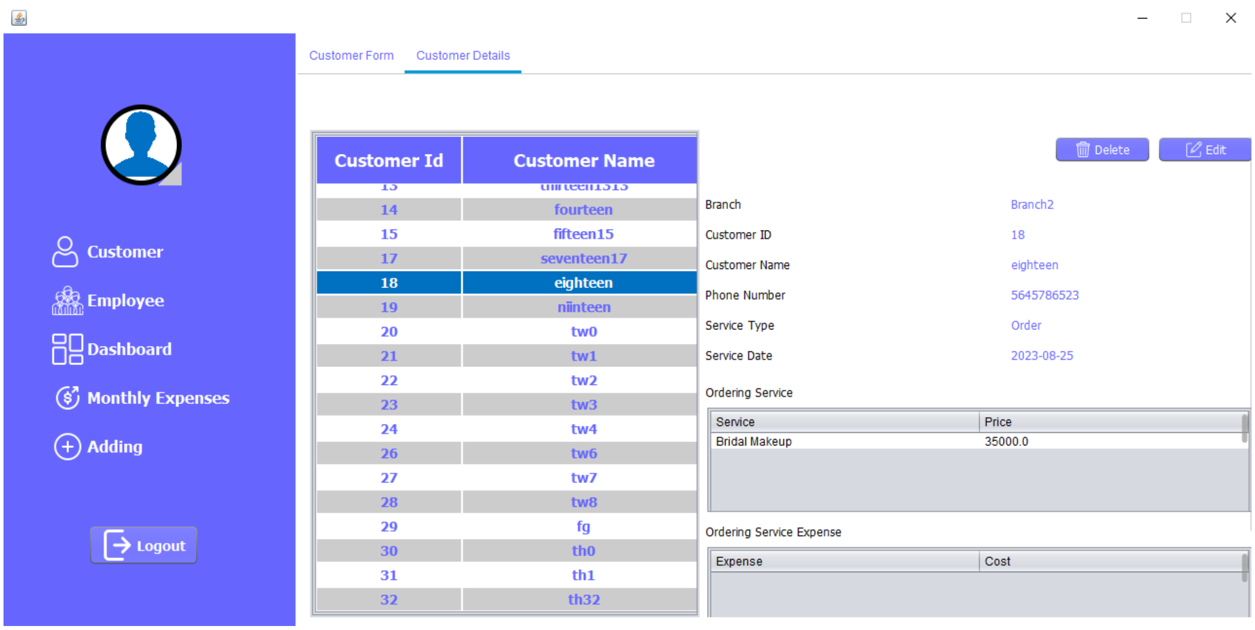
8 Save Customer Details:

1.step Click "Save" to store the customer's information, services, and expenses in the database.

9 Confirmation:

1.step Receive a confirmation message that the customer details have been saved

Viewing Customer Details:



1 Open Customer Details:
   1.step Find and open the "Customer Details" section in your application.

2 Select Customer:
   1.step Within the customer details section, there's a list of customers displayed in a table.

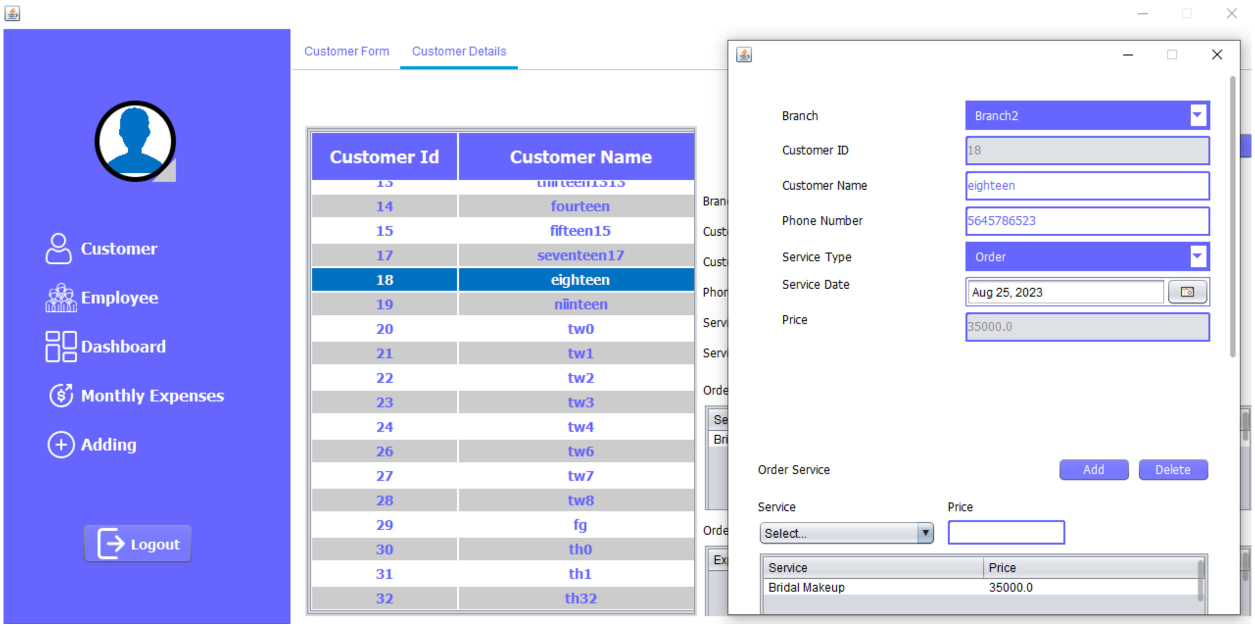
3 Click Customer:
   1.step Click on the customer's name in the table to select them. The customer's details will appear on the screen.

4 Review Information:
   1.step Review the displayed customer information, including their name, phone number, service type, service date, branch, discount, and total price.

5 Service Details:
   1.step Depending on the customer's service type ("Shop" or "Order"), additional details may appear below, such as service descriptions and prices.

6 Close Details:
   1.step To exit the customer detail’s view, close the window or go back to the previous screen.

Editing Customer Details:



1 Open the Edit Form:
   1.step Find the customer you want to edit in your application's customer list or table.

2 Click on the customer's row to select them.
   1.step Look for an "Edit" button or option and click it to open the customer edit form.

3 Edit Customer Details:
   1.step Inside the edit form, you'll see fields with customer information such as name, phone, etc.
   2.step Update any fields you need to change. If there's a "Discount" field, leave it empty if there's no discount.
   3.step Review the changes you've made to ensure they're accurate.

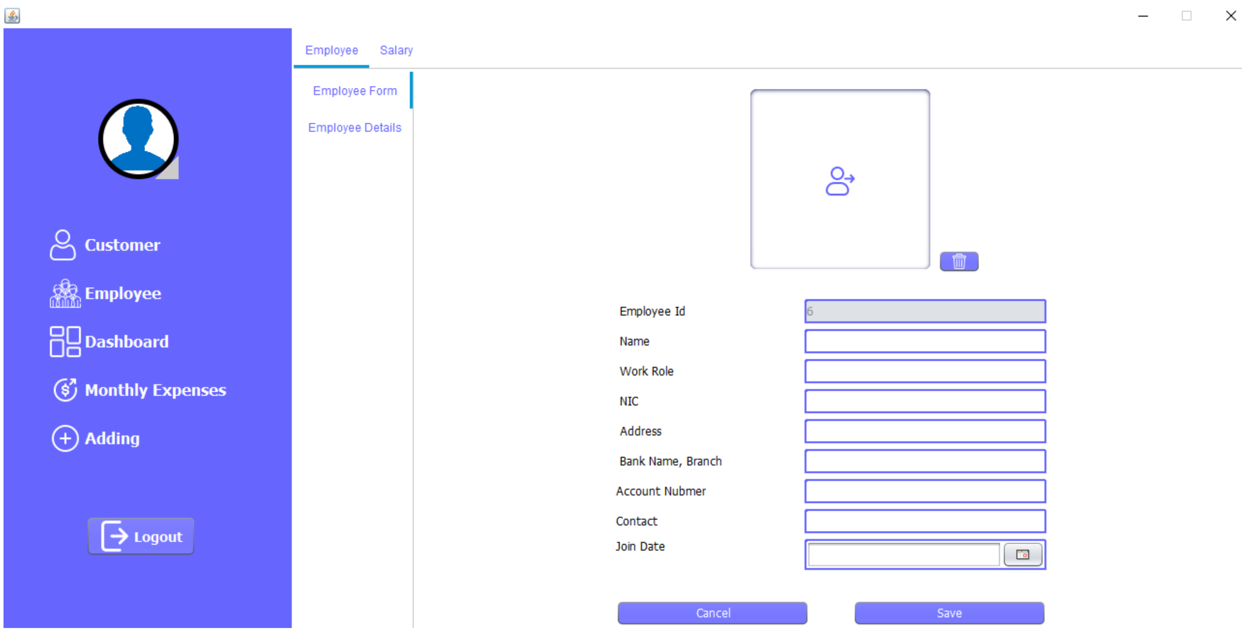
4 Save Changes:
   1.step Find and click the "Save" button within the edit form.
   2.step Make sure that any validation checks, if present, are passed before saving.

5 Viewing Updated Customer Details:
   1.step Refresh the Customer Details:
   2.step After saving, the customer edit form will refresh automatically.
   3.step Check the form to confirm that the customer's details have been updated.

6 Close the Edit Form:
   1.step Once you've confirmed the changes, close the edit form.

Employee Tab

Adding a New Employee:



1 Open Employee Form:
1.step Launch your application, and navigate to the "Employee Form."

2 Fill Employee Information:
1.step Enter the employee's basic information:
2.step Employee Name: Type the full name of the employee.
3.step Role: Specify the employee's job role or position.
4.step National Identity Card (NIC): Enter the employee's NIC number, which should be either 10 or 12 digits long.
5.step Address: Provide the employee's residential address.
6.step Branch: Specify the branch or location where the employee works.
7.step Account Number: Enter the employee's bank account number.
8.step Contact Number: Input the employee's contact number (must be 10 digits long).

3 Choose Joining Date:
1.step Select the employee's joining date using the calendar provided. Click on the calendar icon and pick the date.

4 Upload Employee Image (Optional):
1.step If you have a photo of the employee, you can upload it:
2.step Click on the "Select Image" button.
3.step A file dialog will appear. Choose the image file of the employee.
4.step The selected image will be displayed in the form.

5 Save Employee Details:

1.step Click the "Save" button to store the employee's information, including the image, in the database.

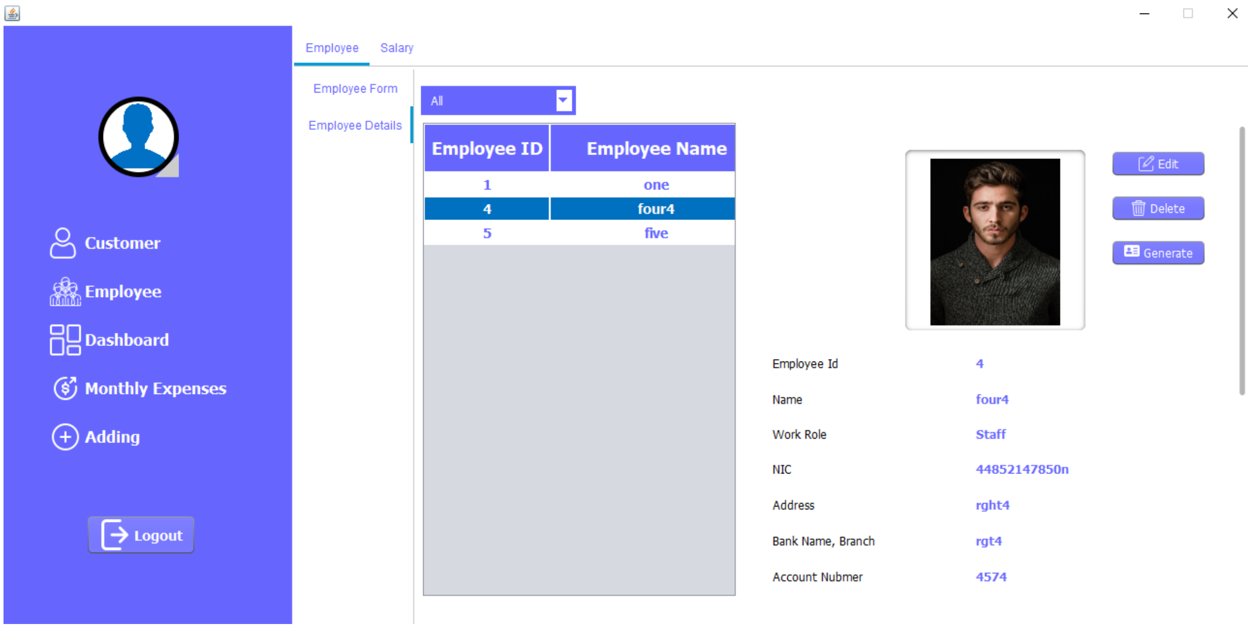
6 Confirmation:

1.step You will receive a confirmation message indicating that the employee details have been successfully saved.

7 Clear Form (Optional):

1.step If you want to enter details for another employee, you can click the "Cancel" button to reset the form fields. This step is optional.

Viewing Employee Details:



1 Open the Employee Details View:
   1.step Launch the Employee Details View within your application.

2 Default Employee List:
   1.step Upon opening, the view displays a table with all employees and basic details.

3 Select an Employee:
   1.step Click on an employee's row in the table to select them and view their details on the right.

4 Employee Details Panel:
   1.step On the right panel, you'll see various employee details, including ID, name, role, and more.

5 Filter "Still Working" Employees:
   1.step To view only "Still Working" employees, click the "Still Working".

6 Filter "Left" Employees:
   1.step To view only "Left" employees, click the "Left".

7 View All Employees:
   1.step To return to viewing all employees, click "All."

8 Salary Details Section:
   1.step Scroll down to see salary details for the selected employee.

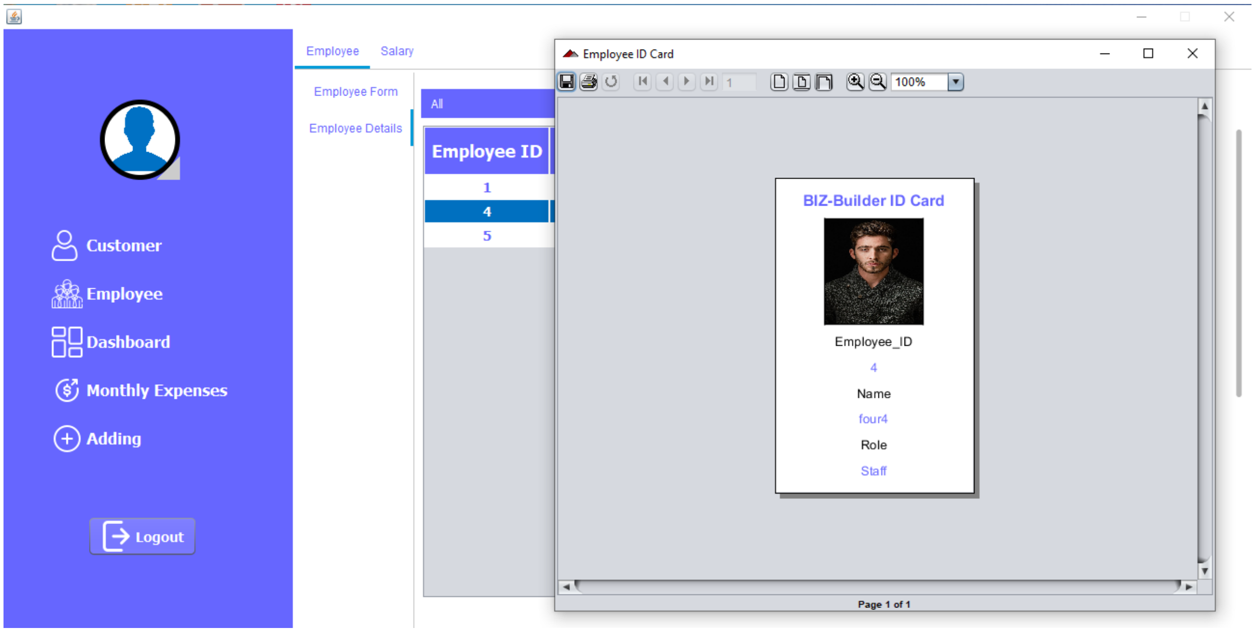
9 Salary Information:

1.step The salary table includes salary month, credited date, salary amount, EPF contribution, and payable salary.

10 Clear Employee Details:

1.step Click "Clear" to remove the displayed details and salary information.

Generating an Employee ID Card:



1 Open the Employee Details View:
   1.step Launch the Employee Details View within your application as instructed earlier.

2 Select an Employee:
   1.step Click on a specific employee's row in the table on the left side to select them.

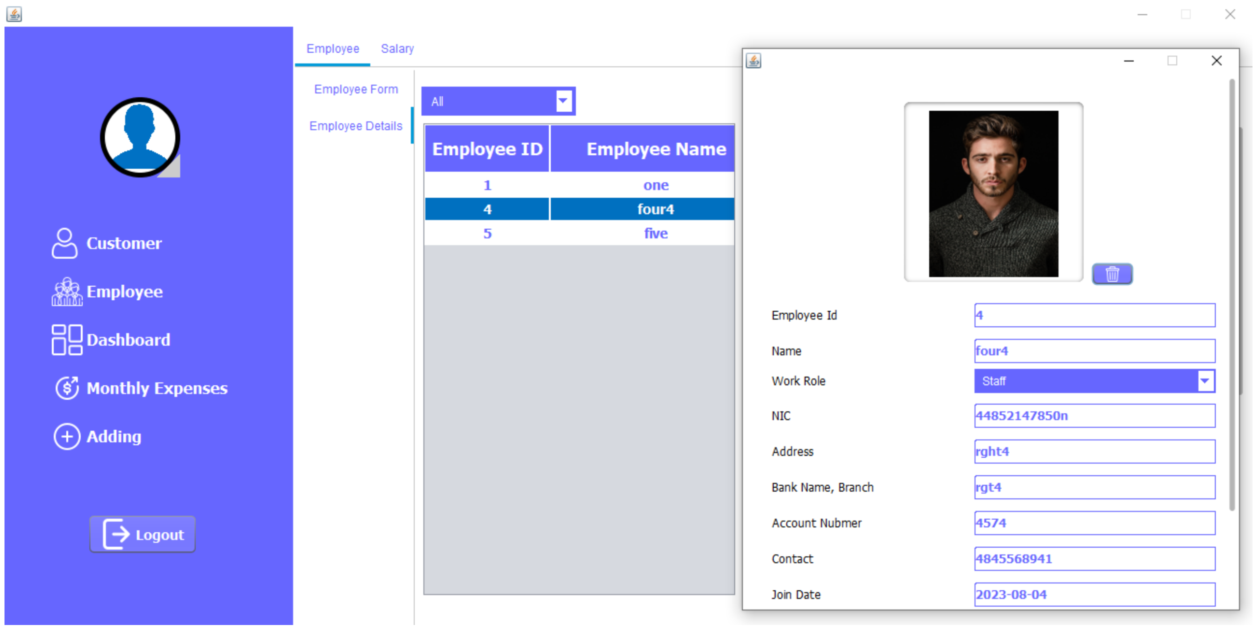
3 Generate an ID Card:
   1.step After selecting an employee, click on the "Generate ID Card" button.

4 View the Employee ID Card:
   1.step A custom window will appear with the employee's ID card.
   2.step The ID card will display the employee's photo, ID, name, and work status.

5 Print or Save the ID Card:
   1.step From the custom window, you can print or save the employee's ID card as required.

6 Generate ID Cards for Other Employees:
   1.step To generate ID cards for other employees, return to the Employee Details View and select a different employee. Then, click the "Generate ID Card" button again.

Using the Employee Edit Form:



1 Open the Employee Details View:

  1.step Launch the Employee Details View within your application as instructed earlier.

2 Select an Employee:

  1.step Click on a specific employee's row in the table on the left side to select them.

3 Edit Employee Details:

  1.step After selecting an employee, click on the "Edit" button.

  2.step The Employee Edit Form window will open with editable fields for the employee's details.

4 Edit Employee Information:

  1.step You can modify the following employee information in the Employee Edit Form:

    I Employee Name
    II Role
    III National Identity Card (NIC) Number
    IV Address
    V Account Number
    VI Account Branch
    VII Contact Number
    VIII Join Date
    IX Work Status (Still Working or Left)
    X Employee Left Date (if the employee has left)
    XI EPF Settled Status
    XII Total EPF Amount
    XIII Settled Date (if EPF is settled)

5 Update Employee Details:

1.step After making the necessary edits, click the "Save" button in the Employee Edit Form.

6 Validation Check:

1.step Before saving, the application will perform validation checks to ensure that essential fields are filled correctly.

7 Update Employee Data in the Database:

1.step If the validation checks pass, the Employee Edit Form will update the employee's details in the database.

8 Refresh Employee Details View:

1.step After successfully updating the data, the Employee Details View will be refreshed to display the latest employee information.

9 View the Updated Information:

1.step The Employee Details View will display the updated details for the selected employee.

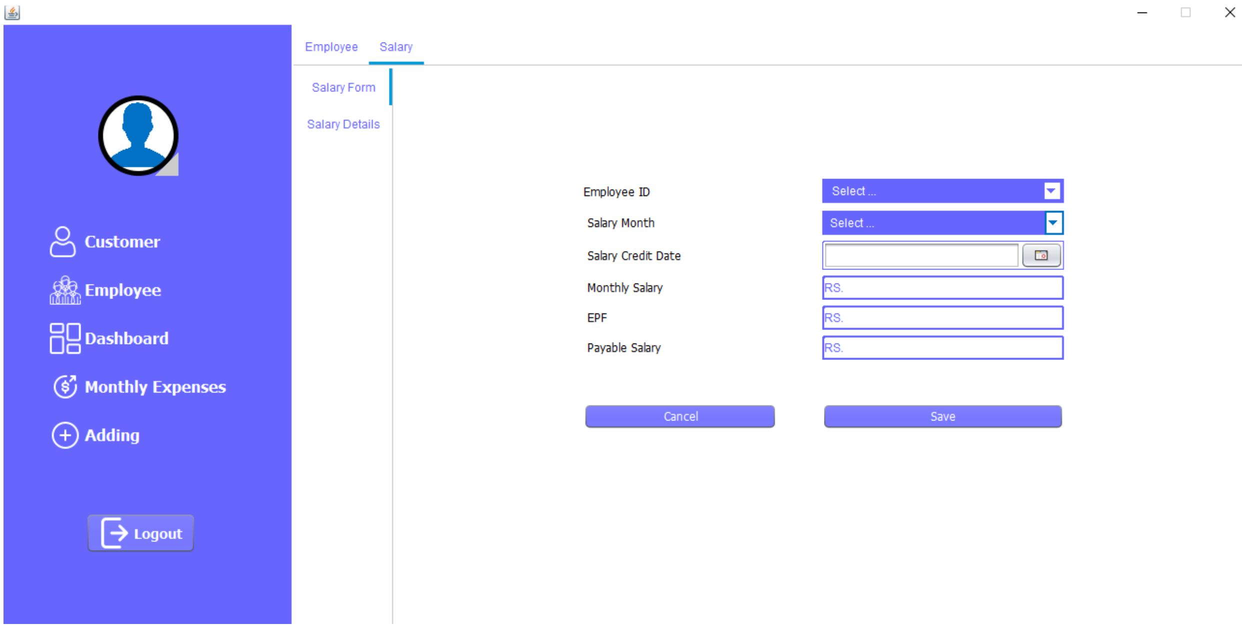
10 Close the Employee Edit Form:

1.step You can close the Employee Edit Form window after making the necessary changes. When the form is closed, the main Employee Details View will be re-enabled.

11 Repeat for Other Employees:

1.step To edit details for other employees, select a different employee from the table, click the "Edit" button, and repeat the editing process.

Using the Salary Form:



1 Open the Salary Form:

1.step Access the Salary Form within your application as required. You might have a button or menu item to open this form.

2 Select an Employee:

1.step From the "Employee ID" dropdown, select the employee for whom you want to record salary details. Ensure that the employee's work status is "Still Working" to be eligible for salary entries.

3 Enter Salary Information:

1.step Fill in the following salary-related information:

I Salary Month: Select the month for which the salary is being recorded.

II Salary Credit Date: Choose the date when the salary is credited.

III Monthly Salary: Enter the employee's monthly salary.

IV EPF (Employee Provident Fund): Enter the EPF amount for the employee.

V Payable Salary: This field might be calculated automatically based on the other inputs or can be entered manually.

4 Validate Input:

1.step Click the "Save" or equivalent button to initiate the saving process. Before saving, the application performs input validation to ensure that essential fields are correctly filled. If any validation fails, an error message will be displayed.

5 Clear Fields:

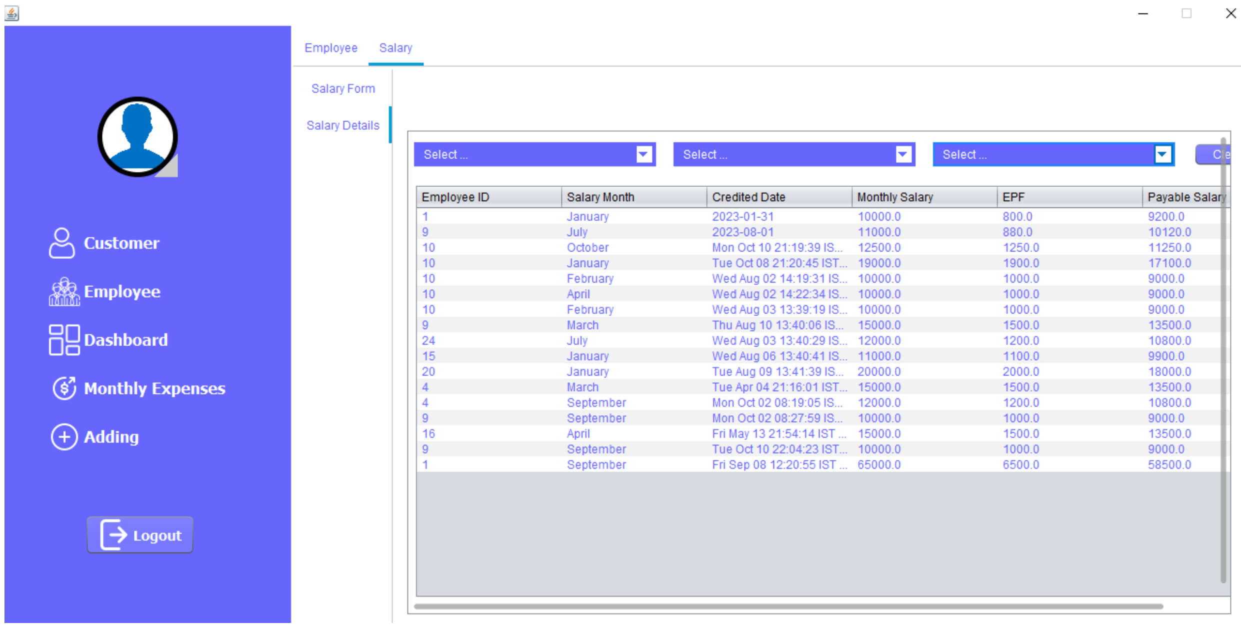
1.step After successfully saving the salary details, you can clear the fields by clicking a "Clear" or equivalent button.

6 Calculate and Update Total EPF:
1.step The application automatically calculates and updates the total EPF for the selected employee

7 View the Updated Total EPF:
1.step The total EPF value for the employee is displayed in the Employee Details View after the update.

8 Repeat for Other Employees:
1.step To record salary details for other employees, select a different employee from the "Employee ID" dropdown and repeat the salary entry process.

Using the Salary Details Table View:



1 Open the Salary Details Table View:
   1.step Locate and open the Salary Details Table View in your application.

2 View Salary Details:
   1.step The table displays salary details of employees, including Employee ID, Salary Month, Salary Date, Monthly Salary, EPF, and Payable Salary.

3 Filter by Employee ID:
   1.step Choose an Employee ID from the "Employee ID" dropdown to view details for a specific employee.

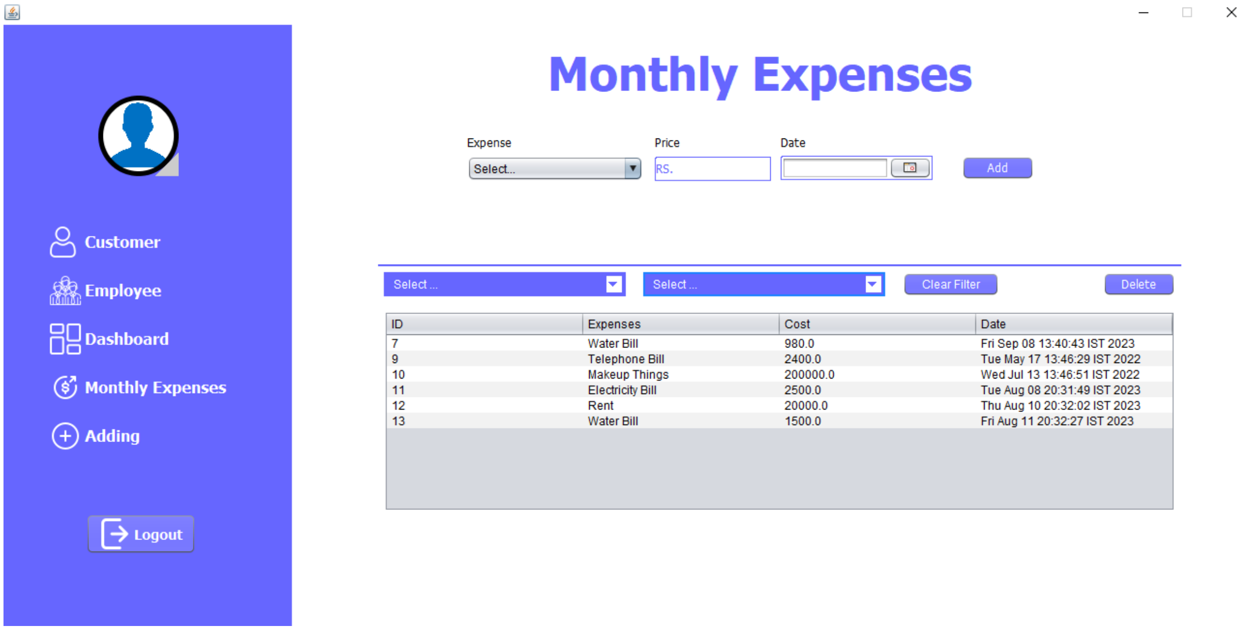
4 Filter by Month:
   1.step Select a month from the "Month" dropdown to view details for a specific month.

5 Filter by Year:
   1.step Pick a year from the "Year" dropdown to view details for a specific year.

6 Combine Filters:
   1.step You can combine filters to refine your search further. For instance, select both an Employee ID and a specific Month to see more precise results.

7 Clear Filters:
   1.step To clear filters and view all salary details, select "Select ..." in each dropdown or leave them as they are.

Monthly Expenses Tab



Monthly Expenses Form:

1 Open the Monthly Expenses Form:
  1.step Locate and open the Monthly Expenses Form in your application.

2 Add Monthly Expenses:
  1.step Select an expense category from the "Expenses" dropdown menu.
  2.step Enter the price for the selected expense category in the "Price" field.
  3.step Choose a date for the expense using the date picker.

3 Validation:
  1.step Ensure that you select an expense, enter a price, and choose a date; otherwise, you'll receive validation messages.

4 Add to Table:
  1.step Click the "Add" button to add the expense entry to the table below.
  2.step The table displays the added expenses along with their details: Expense Category, Price, and Date.

5 Delete from Table:
  1.step Select a row in the table by clicking on it.
  2.step Click the "Delete" button to remove the selected expense entry from the table.

6 Insert to Database:
  1.step Click the "Save" or "Insert" button to save the added expense entries to the database.
  2.step The records are saved, and a confirmation message is displayed.

Monthly Expenses Table View:

1 Open the Monthly Expenses Table View:
   1.step Locate and open the Monthly Expenses Table View in your application.

2 View Monthly Expenses:
   1.step The table displays the saved monthly expenses, including Expense ID, Expense Category, Cost, and Date.

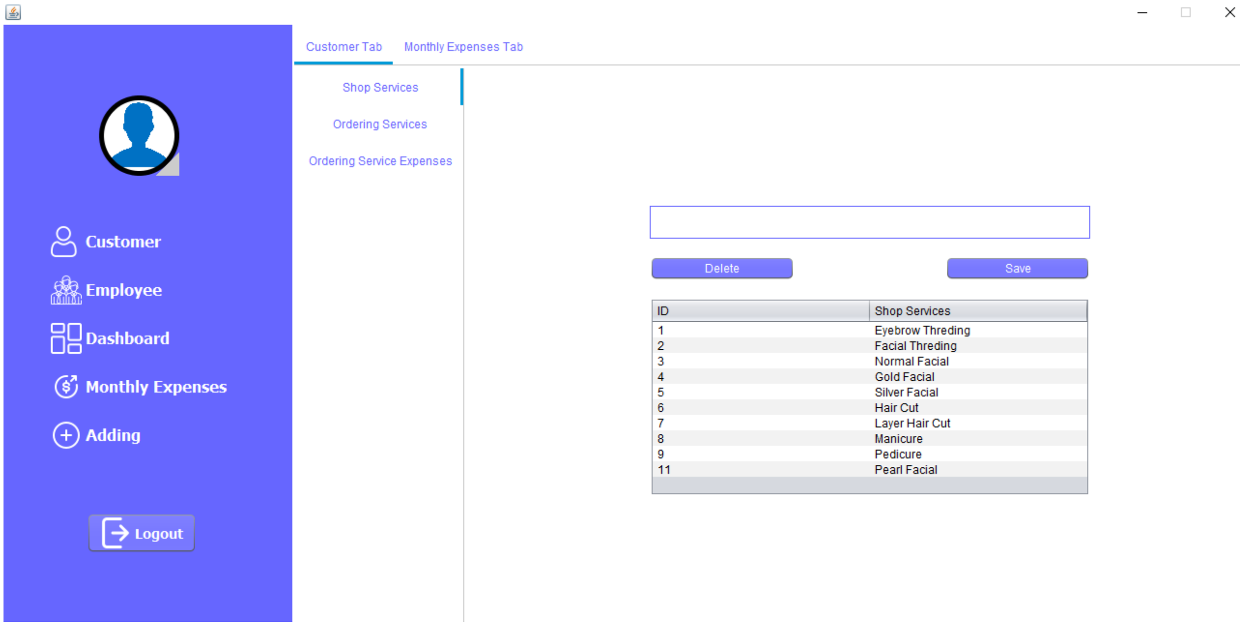
3 Filter by Month and Year:
   1.step Use the "Month" and "Year" dropdown menus to filter the displayed monthly expenses by month and year.

4 Combine Filters:
   1.step You can combine filters to refine your search further. For instance, select both a specific month and year to see more precise results.

5 Clear Filters:
   1.step To clear filters and view all monthly expenses, select "Select ..." in both dropdowns or leave them as they are.

6 Delete Records:
   1.step Select a row in the table by clicking on it.
   2.step Click the "Delete" button to remove the selected monthly expense record from the table and the database.

Adding Tab



For All Tables (Shop Service Categories, Ordering Service Categories, Ordering Service Expenses, Monthly Expense Categories):

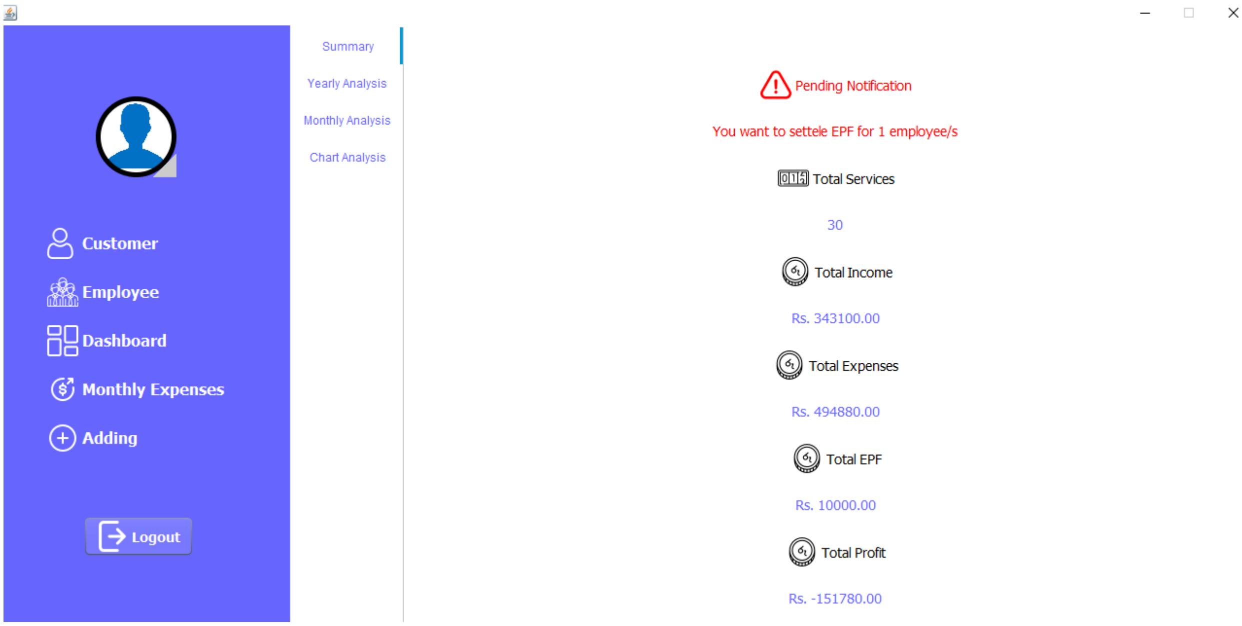
1 Filter Table Data
- 1.step Allow users to enter text in a search field associated with each table.
- 2.step Implement a filter mechanism that updates the displayed rows in response to the entered text.

2 Add New Entries
- 1.step Provide an input field where users can enter new category names.
- 2.step Include a button that allows users to save new entries to the respective table.

3 Delete Entries
- 1.step Enable users to select a row in each table.
- 2.step Add a button that deletes the selected entry from the respective table when clicked.

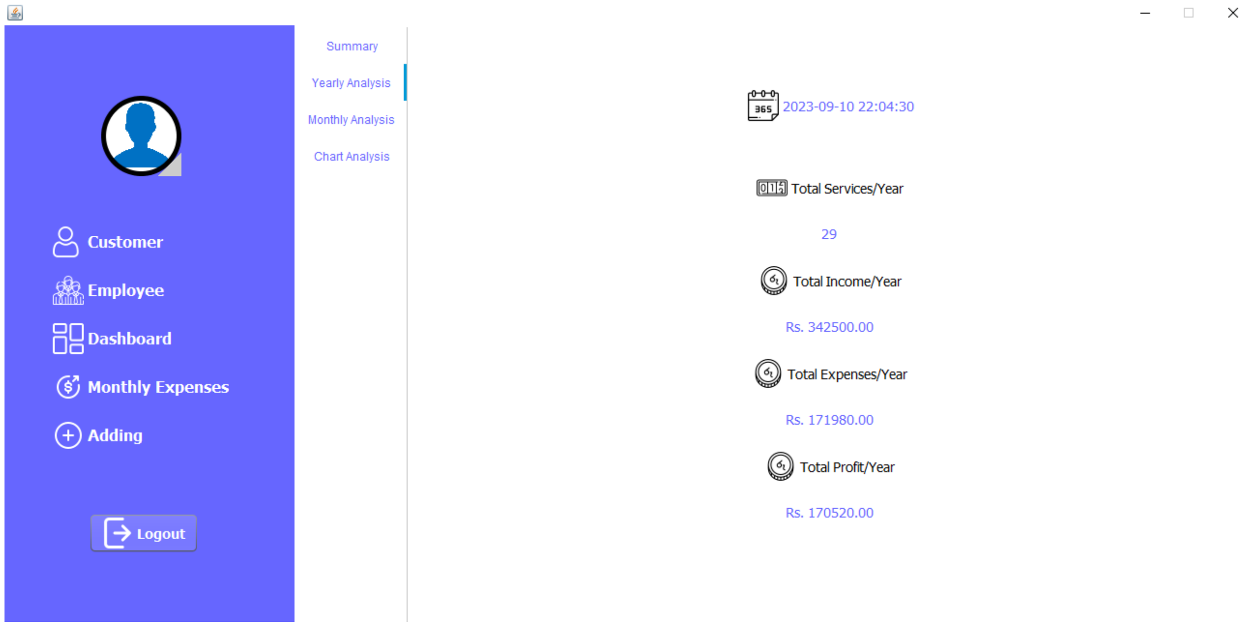
Dashboard

Summary View



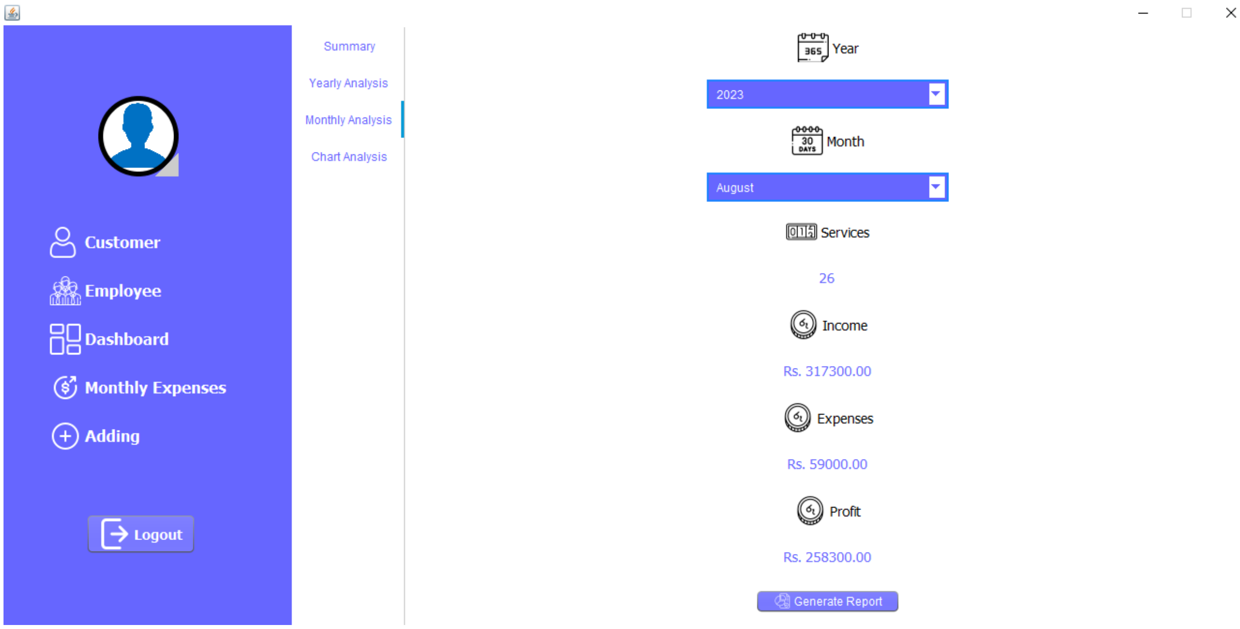
1. Calculate Total Income
   - The code retrieves the total income by summing up the prices of all transactions from a specific table.
2. Calculate Customer Count
   - The code counts the total number of customers stored in a specific table.
3. Calculate Total EPF
   - The code determines the sum of Employee Provident Fund (EPF) contributions for all employees.
4. Calculate Total Expenses
   - The code computes the combined total of monthly expenses and salaries paid.
5. Calculate Total Profit
   - The code calculates the overall profit by subtracting total expenses from total income.
6. Check EPF Pending Status
   - The code checks if there are pending EPF settlements for any employees and provides information accordingly.

Yearly Analysis View



1 Current Data and Time
2 Count Customers for the Current Year
  - It counts the number of customers whose service dates fall within the current year.
3 Calculate Total Income for the Current Year
  - It calculates the total income by summing up the prices of all transactions within the current year.
4 Calculate Total Monthly Expenses for the Current Year
  - It computes the total monthly expenses incurred during the current year by summing the costs of expenses whose dates contain the current year.
5 Calculate Total Salary for the Current Year
  - The code determines the total salary paid out during the current year by summing the salaries where the credited year matches the current year.
6 Calculate Total Profit for the Current Year
  - It calculates the overall profit for the current year by subtracting total expenses from total income.

Monthly Analysis View:

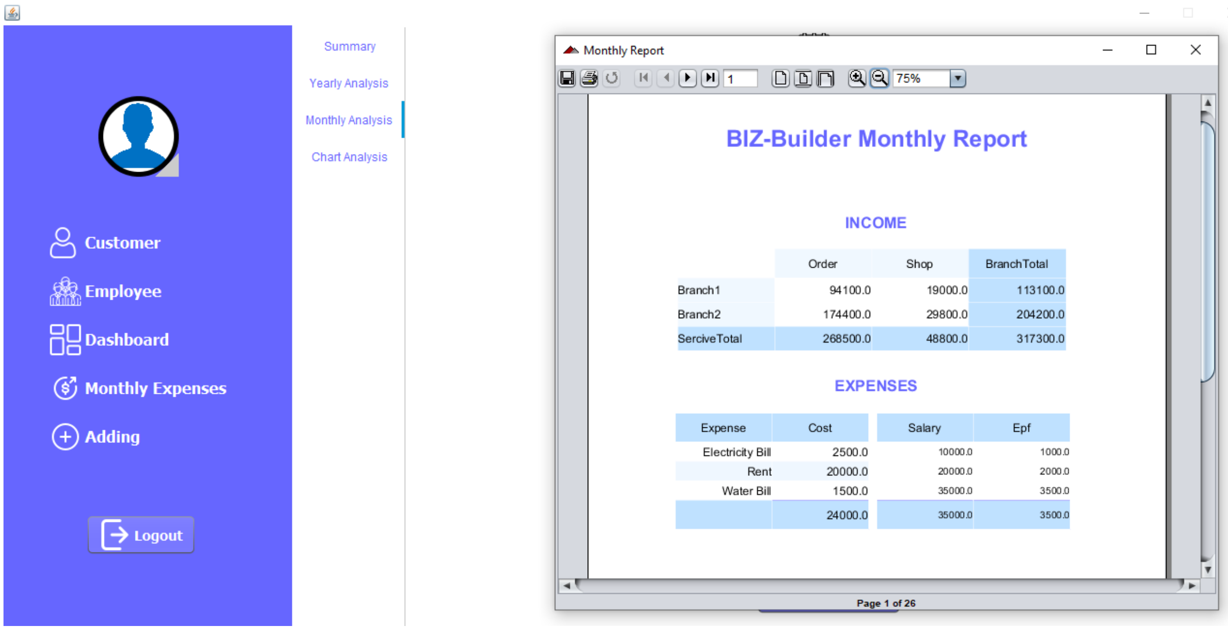


1 User Input - Selected Year and Month
   - ➢ The user selects a year and a month from dropdown menus.

2 Customer count for the selected month and year.
   - ➢ Total income for services provided in the selected month and year.
   - ➢ Total monthly expenses for the selected month and year.
   - ➢ Total monthly salary expenses for the selected month and year.

3 Display Results
   - ➢ The total profit is calculated and displayed in a text field.

Generating a Monthly Report:



1 Open the Monthly Analysis View:
   - ➢ Launch the Monthly Analysis View within your application as instructed earlier.

2 Select a Year and Month:
   - ➢ Use the drop-down menus to select the desired year and month for the report.
   - ➢ Ensure both year and month are selected; otherwise, you'll receive a warning message.

3 Generate the Report:
   - ➢ Click the "Generate Report" button to initiate the report generation process.

4 View the Employee ID Card:
   - ➢ A custom window will appear with the report.
   - ➢ The report will display the Monthly income, Monthly Expenses and Summary.

5 Print or Save the ID Card:
   - ➢ From the custom window, you can print or save the report as required.

Chart Analysis View

1 Grouped Bar Chart for 5-Year Analysis
- ➢ Fetch 5-year analysis data (year, income, expense, profit) from the database.

2 Pie Chart for Shop Services Analysis
- ➢ Fetch data for shop service analysis (service names and total prices).
- ➢ Customize colors for different service types.

3 Pie Chart for Ordering Services Analysis
- ➢ Fetch data for ordering service analysis (service names and total prices).
- ➢ Customize colors for different service types.