Detail of Action Button

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| **S.No.** | **Action Button** | **Description** |
| 0 | Existing Record | Whenever user click / select any master form or any transaction form then all existing record would appear in the new screen. |
| 1 | Add | In case user wants to add new record in the selected form then user would click on Add button. Software would check the access rights and accordingly, system would allow to action on it. Software has functionality of Undo the record. Please refer below said Undo functionality. |
| 2 | Edit | In this case system would not allow to edit the document number.  In case user wants to modify existing record in the selected form then user would select existing record and click on Edit button. System would not allow to select multiple records at a time. System would give alert message i.e. “You cannot select multiple records”. Software would show all the relevant information and user may change it as per rules & validations of the form.  Software would check the access rights and accordingly, system would allow to action on it. Software has functionality of Undo the record. Please refer below said Undo functionality.  Software cannot edit the record after approval process. |
| 3 | Save | Save button will work in Add mode, Edit Mode, Approved mode and attachment mode only.  **Add Mode**: In case user entered required mandatory information then user may save the record by click on the save button. System would check whether user entered all required information. In case system found any blank information in the mandatory field then system would provide alert message “Please enter mandatory field” and by default cursor would reach on the particular field where system found error.  System would ask the question “Do you want to save this record?” By default system would show the cursor on “Yes button” but user would take decision either user may click on Yes or No. If user press No then system would not save entered data and cursor would go back on the first field. If user press Yes then system would save the data of the current record and by default cursor would go to first field for the next record after saving of previous record. It means there is no requirement to click on add button again for next adding the record.  In case multi users do data entry in the same form of same company, Branch & Financial Year then system would check last record while saving process and would assign latest as well as last document number to the current record. Always, system checks the duplicity of document number.  **Edit Mode**:  In case user modified required information then user may save the record by click on the save button. System would check whether user entered all required information. In case system found any blank information in the mandatory field then system would provide alert message “Please enter mandatory field” and by default cursor would reach on the particular field where system found error.  System would ask the question “Do you want to save this record?” By default system would show the cursor on “Yes button” but user would take decision either user may click on Yes or No. If user press No then system would not save modified data and cursor would go back on the first field. If user press Yes then system would save the modified data of the current record. Cursor would go to first field with blank information. |
| 4 | View | In this case system would not allow to change any information.  In case user wants to see existing record in the selected form then user would select existing record and click on View button. System would not allow to select multiple records at a time. Software would show all the relevant information. Software would check the access rights and accordingly, system would allow to action on it. |
| 5 | Print | In this case system would not allow to change any information.  In case user wants to print existing record in the selected form then user would select existing record and click on Print button. System would allow to select multiple record at a time. Software would show all the relevant information. Software would check the access rights and accordingly, system would allow to action on it. |
| 6 | Undo | Undo button will work in Add mode or Edit Mode only.  **Add mode**: User may erase the information of whole selected form which user has just entered it. System would ask the question “Do you want to erase entered information in this record?” By default system would show the cursor on “No button” but user would take decision either user may click on Yes or No. If user press No then system would not erase entered data and cursor would go back on the last entered field. If user press Yes then system would erase the data of the current record.    **Edit Mode**: In case user click on edit button and user did changes as required but before save the record, user realized that user does not want to save the modification then software allow to click on Undo button. System would ask the question “Do you want to erase entered information in this record?” By default system would show the cursor on “No button” but user would take decision either user may click on Yes or No. If user press No then system would not erase modify data and cursor would go back on the last entered field. If user press Yes then system would erase the modify data of the current record. Once system saved the record then cursor go to existing record screen, please refer point No.0. |
| 7 | Cancel | Cancel does not mean delete the record. It means due to some clerical mistakes, user enter the record in the system. But, superior checks it and found that it is not required. In this case user would cancel the record. It would remain in the database-tables after cancel the record, but it would not appear in any report.  In case user wants to cancel existing record in the selected form then user would select existing record and click on Cancel button. System would not allow to select multiple records at a time. Software would show all the relevant information. Software would check the access rights and accordingly, system would allow to action on it.  In case user cancel any approved record then system would check it whether it is used in further master or transaction record. If it is used in further record then system would not allow to cancel the record. |

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| 8 | Approved | Software has provision to approve the record Upto 5 levels. ERP administrator can define in the Role Master and User-Role Mapping. Voucher Type wise level can be defined. Also, software has provision to link with “Amount matrix – voucher type- approval level wise”. In case user wants to enable it then it will work else it would not work.  Software would validate that Approval 1 must be different from all approval level. Thus, software would not allow to use same user in any level against same voucher type.  In case user wants to approve record in the selected form then user would click on Approved button and software would fresh page of existing records and would provide pending for approval records which are related to particular user.  **Scenario 1**: User would select record which is pending for approval. Approval authority person may modify the record if required and user may change it as per rules & validations of the form. User would click on the save button and system would save & approve it.  **Scenario 2**: In case approval authority person wants to approve multiple records at a time then user may select multiple records from pending for approval list and click on the  Save button and system would save & approve it. In this case approval authority cannot edit the record during approval process. |
| 9 | Attachment | Software has functionality to attach multiple documents in a record. Attachment files would save in the local folder. In case user wants the same folder on the cloud then B-Square would charge on it, but it will provide. Software would check the access rights and accordingly, system would allow to action on it.  In case user wants to attach document with the existing record in the selected form then user would select existing record and click on Attached button. System would not allow to select multiple records at a time. Software would open Attachment form. User may attach as desired. User press save button and system would attached all documents with the particular record. Software would allow to add multiple attachment of following extension and maximum size of one file is 2MB:   * Word / Excel / Power point * PDF / JPEG / JPG / PNG / CSV * Auto cad / TXT / BMP / TIFF * Google Doc / Google Sheet / Google Slide   Please refer Attachment Master and Attachment form. |
| 10 | Exit | Exit button will work when cursor at existing record screen. If user would click on Exit button then main menu screen / welcome screen will appear. |