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Introduction

- Vbooks provides Role based Access management capabilities and introduces to the user management controls and describes the privileges available with Vbooks.
- The Organization Super User has the privilege to manage users account.
- User can access VBooks resources according to the permissions allocated.
- The user experience depends on the type of user, permissions set and the defined role.

User level hierarchy

The six types of User level hierarchy with VBooks are:

- Level 1 – Super User
- Level 2 – Management Team
- Level 3 – Accountant Team
- Level 4 – Sales Executive Team

Super User

Organization Super User has the authority to create an Employee, Products, Customer, can assign stock to Sales Executive respectively, can approve requests from Sales Executive, has Reports, can define System defaults with in the organization.

Only Organization Super User has the authority to alter the Costs available in the system with in the Organization.

Management Team

Management User has the authority to create an Employee, Products, Customer, can assign stock to Sales Executive respectively, can approve requests from Sales Executive, has Reports, can define System defaults with in the organization.

Accountant Team

Accountant User has the authority to create an Employee, Products, Customer, can assign stock to Sales Executive respectively, can approve requests from Sales Executive, has Reports, can define System defaults with in the organization.

Sales Executive Team

Sales Executive only has the authentication to sell products, to collect cash, to give journals(on approval of Management), to collect Sales Return(on approval of Management), to end his Daily activity.

Pages and Page links

- Manage Employee
  - Add Employee
  - Search Employee
  - Import Employee
- Assign Customer

- Assign Customers
- Search Assign Customers

Manage Employee

Manage Employee is a place where we add / modify / disable / search users.

Adding Employee

Place to add employee(user) to the system.

Adding an employee is a 4 step process(including preview).

Field Description's available in Multiple Steps

Step 1: Basic Info

Step to provide the Basic Information of the Employee.

S. No	Field Header	Description	Accepted Values
1	Username	A Unique username to the employee respectively to access the system.	Alphabets, numbers, periods (.) and underscores (_).
2	Password	Password against the username to access the system	Min 8 characters, Alphabets, numbers and a special character.
3	First Name	First Name of the Employee respectively.	Alphabets.
4	Middle Name (Optional)	Middle Name of the Employee respectively.	Alphabets.
5	Last Name	Last Name of the Employee respectively.	Alphabets.
6	Email Address	Email ID of the Employee respectively.	In the format "test@test.com"
7	Employee Type	Type of employee respectively.	Selection from drop down.
8	Granted Days	No of days a Sales Executive can view the transactions. Field will be displayed only if Employee Type Selected as "Sales Executive".	Default 2
9	Gender	Employee Gender	Selection from available options.

Step 2: Additional Info

Step to provide Additional Info and Contact Info.

S. No	Field Header	Description	Accepted Values
1	Mobile Number	Mobile Number of the Employee respectively.	Numbers, Space, Hyphen(-) and Curly Braces(()).
2	Direct Line (Optional)	Direct Line of Employee respectively.	Numbers, Space, Hyphen(-) and Curly Braces(()).
3	Alternative Mobile No (Optional)	Alternate Mobile Number of the Employee respectively.	Numbers, Space, Hyphen(-) and Curly Braces(()).
4	Blood Group	Blood Group of the Employee respectively.	Standard Blood Groups (A+, A-, B+, B-, etc....)
5	Passport Number	Passport Number of the Employee respectively.	Alphabets, Numbers, Special Characters
6	Nationality	Nationality of the Employee respectively.	Alphabets.

Step 3: Address

Step to provide Address Info.

S. No	Field Header	Description	Accepted Values
1	Address 1	Address 1 of employee respectively.	Alphabets, Numbers, Special Characters
2	Address 2	Address 2 of employee respectively.	Alphabets, Numbers, Special Characters
3	Locality	Locality of employee respectively.	Alphabets, Numbers, Special Characters
4	Landmark	Landmark of employee respectively.	Alphabets, Numbers, Special Characters
5	City	City of employee respectively.	Alphabets, Numbers, Special Characters
6	State	State of employee respectively.	Alphabets, Numbers, Special Characters
7	Zipcode	Zipcode of employee respectively.	Numbers
8	Address Type	Address Type of employee respectively. Selection of Address Types defined in System Lookups	Selection from Drop Down

Step 4: Preview

A preview to verify all the details provided in the above steps to save the

data to the system.

Example

To add an Employee Leela to the System as Sales Executive

1. Login as Management / Accountant User
2. Drive to Employee Module --> Manage Employee Page --> Add Employee Page Link

3. Enter the following Details
   a) Username: Leela
   b) Password: Leela@123
   c) First Name: Leela
   d) Last Name: Krishna
   e) Email Address: leela@org.com
   f) Select Employee Type as Sales Executive
   g) Select Gender as Male
   h) Granted Days: 2

4. Click on Next for Additional Info Page

5. Enter the following details in Additional Info page

    a) Mobile Number: 9999912321

    b) Blood Group: A+

    c) Passport Number: HYD123123GH

    d) Nationality: Indian

6. Click on Next for Address Step.

7. Enter the following details in Address Page
   a) Address 1: Flat No 123
   b) Locality: Madhapur
   c) City: Hyderabad
   d) State: Andhra Pradesh
   e) Zipcode: 500081
   f) Select Address Type as Present

8. Click on Next to review all the details provided in the above steps

User Name	bn.leela	Gender	Male
First Name	Leela	Email Id	leela@blueniledist.com
Middle Name		Employee Type	Sales Executive
Last Name	Krishna	Employee Number	BNDistSLE1

Mobile Number	9999912321	Blood Group	A+
Direct Line		Passport Number	HYD123123GH
Alternate Mobile		Nationality	Indian

Address1	Flat No 123	City	Hyderabad
Address2		State	Andhra Pradesh
Locality	Madhapur	ZipCode	500081
Landmark		Address Type	Present

Granted Days	2

9. Click on Save to add employee leela to the system

10. A Message Saved Successfully will be displayed on saving the details to the system.

Search Employee

A place where we can find all the Employees available in the system.

Based on the search criteria we can short list the results.

Fields Description

S. No	Field Header	Description	Accepted Values
1	First Name	First Name of the Employee	Alphabets
2	Last Name	Last Name of the Employee	Alphabets
3	Username	Username of the Employee	Alphabets, numbers, periods (.) and underscores (_).
4	Employee Type	Type of Employee, from Selection Drop Down	Selection from Drop Down

Example

To search the employees "Leela" available in the system
1. Login as Management / Accountant user
2. Drive to Employee Module --> Manage Employee Page --> Search Employee Page link.
3. All the available employees in the system will be displayed

4. Enter the Following in Search Criteria
   a) First Name: Leela
   b) Select Employee Type as "Sales Executive"

Add Employee	**Search Employee**	**Import Employee**

First Name Leela   **Username**

Last Name   **Employee Type** Sales Executive ▼

Search   **Clear**

G Username bn.raghava	Mobile Number 9887888898 Employee Type **Super Management**	
FNO Username bn.mgtuser15	Mobile Number 9392960669 Employee Type **Management**	
FNN Username bn.mgtuser14	Mobile Number 9392960668 Employee Type **Management**	
FNM Username bn.mgtuser13	Mobile Number 9392960667 Employee Type **Management**	
FNL Username bn.mgtuser12	Mobile Number 9392960666 Employee Type **Management**	
FNK Username bn.mgtuser11	Mobile Number 9392960665 Employee Type **Management**	
FNJ Username bn.mgtuser10	Mobile Number 9392960664 Employee Type **Management**	
FNI Username bn.mgtuser9	Mobile Number 9392960663 Employee Type **Management**	

5. Click on Search to get the Record's with First Name as Leela

Add Employee	**Search Employee**	**Import Employee**

First Name Leela   **Username**

Last Name   **Employee Type** Sales Executive ▼

Search   **Clear**

Leela Username bn.leela	Mobile Number 9999912321 Employee Type **Sales Executive**

Editing Employee's

Employee's details can be modified by clicking the edit icon available in the search Employee.

On clicking the edit button a 4 step page opens with all the details filled up with provided details while creating an Employee.

Example

To edit the employees Leela available in the system to change Phone No to 9888812312

1. Login as Management / Accountant user
2. Drive to Employee Module --> Manage Employee Page --> Search Employee Page link.
3. All the available employees in the system will be displayed.

4. Enter the following in the search criteria
   a) First Name: Leela

b) Select Employee Type as Sales Executive.

5. Click on Search.

6. Leela Record will be displayed.
7. Click on Edit button on the record of Leela

Add Employee | **Search Employee** | **Import Employee**

Basic Info ⟩ **Additional Info** ⟩ **Address** ⟩ **Preview**

Username bn.leela

Employee No BNDistSLE1

First Name Leela

Email Address leela@blueniledist.com

Middle Name

Employee Type Sales Executive ▾

Last Name Krishna

Gender ◉ Male ○ Female

Granted Days 2

[Next] [Clear] [Cancel]

8. Click on Next for Additional Info Page

Add Employee | **Search Employee** | **Import Employee**

Basic Info ⟩ **Additional Info** ⟩ **Address** ⟩ **Preview**

Mobile Number 9999912321

Blood Group A+

Direct Line

Passport Number HYD123123GH

Alternate Mobile No

Nationality Indian

[Previous] [Next] [Clear] [Cancel]

9. Change Mobile from 9999912321 to 9888812312

10.   Click on Next for Address Page

11.Click on Next to preview the details and to update the details.

12. Click on Update to Update the details to the system.
13. A Message Updated Successfully will be displayed on Update of the Data to the System.

Viewing Employee Details

A Place to view details of the Employee available in the system.
An employee details can be viewed by clicking the view icon available against the Employee which need to be viewed.

Example

To View Employee Leela's details available in the system.
1. Login as Management / Accountant user
2. Drive to Employee Module --> Manage Employee Page --> Search Employee Page link.
3. All the available employees in the system will be displayed.

4. Enter the following in the search criteria
   a) First Name: Leela
   b) Select Employee Type as Sales Executive.

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5. Click on Search.
6. Leela Record will be displayed.

7. Click on View button on the record of Leela
8. A Pop-up with details of employee leela will be displayed

Employee Details

User Name	bn.leela	Gender	Female
First Name	Leela	Email Id	leela@blueniledist.com
Middle Name		Employee Type	SLE
Last Name	Krishna	Employee Number	BNDistSLE52
Mobile Number	9888812312	Blood Group	A+
Direct Line		Passport Number	
Alternate Mobile		Nationality	Indian
Address1	Flat No 123	City	Hyderabad
Address2		State	Andhra Pradesh
Locality	Madhapur	ZipCode	500081
Landmark		Address Type	Permanent
Granted Days	2		

Close

9. Click on Close to Close the Pop-up

Disabling Employee

A Place to disable an Employee available in the system.
An employee can be disables by clicking the disable icon available in the search page.

Example

To Disable Employee Leela's available in the system.
1. Login as Management / Accountant user
2. Drive to Employee Module --> Manage Employee Page --> Search Employee Page link.
3. All the available employees in the system will be displayed.

4. Enter the following in the search criteria
   a) First Name: Leela
   b) Select Employee Type as Sales Executive.

Add Employee	**Search Employee**	**Import Employee**

First Name   Leela   Username

Last Name   Employee Type   Sales Executive ▼

          Search   Clear

G Username bn.raghava	Mobile Number 9887888898 Employee Type **Super Management**
FNO Username bn.mgtuser15	Mobile Number 9392960669 Employee Type **Management**
FNN Username bn.mgtuser14	Mobile Number 9392960668 Employee Type **Management**
FNM Username bn.mgtuser13	Mobile Number 9392960667 Employee Type **Management**
FNL Username bn.mgtuser12	Mobile Number 9392960666 Employee Type **Management**
FNK Username bn.mgtuser11	Mobile Number 9392960665 Employee Type **Management**
FNJ Username bn.mgtuser10	Mobile Number 9392960664 Employee Type **Management**
FNI Username bn.mgtuser9	Mobile Number 9392960663 Employee Type **Management**

5. Click on Search.
6. Leela Record will be displayed.

Add Employee	**Search Employee**	**Import Employee**

First Name   Leela   Username

Last Name   Employee Type   Sales Executive ▼

          Search   Clear

| **Leela** Username bn.leela | Mobile Number 9999912321 Employee Type **Sales Executive** |

7. Click on Disable button on the record of Leela
8. A conformation pop-up messages opens

Employee List

Are You Sure Want To Disable This Employee ?

Yes   No

9. Click on Yes to disable the Employee.

| Add Employee | Search Employee | Import Employee |

First Name   Leela   Username
Last Name   Employee Type   Sales Executive ▼

Search   Clear

Leela   Mobile Number 9888812312
Username bn.leela   Employee Type **Sales Executive**

Disable Employees Record will be Faded.

Enabling Employee

A Place to enable a user available in the system who has been disabled. Disabled employee can be enabled by clicking the enable icon available in the search page.

Example

To Disable Employee Leela's available in the system.
1. Login as Management / Accountant user
2. Drive to Employee Module --> Manage Employee Page --> Search Employee Page link.
3. All the available employees in the system will be displayed.

4. Enter the following in the search criteria
   a) First Name: Leela
   b) Select Employee Type as Sales Executive.

5. Click on Search.
6. Leela Record will be displayed.

Disabled Employees Record will be Faded.

7. Click on Enable button on the record of Leela
8. A conformation pop-up messages opens

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9. Click on Yes to Enable the Employee.

Employee's Last Login Details

A Place to view login timestamps of Employee's.
Last Login details of employee can be viewed by clicking View Login Details icon available in the search page.

Example

To View Login Details of Employee Leela's available in the system.
1. Login as Management / Accountant user
2. Drive to Employee Module --> Manage Employee Page --> Search Employee Page link.
3. All the available employees in the system will be displayed.

4. Enter the following in the search criteria
   a) First Name: Leela
   b) Select Employee Type as Sales Executive.

Add Employee	Search Employee	Import Employee	

First Name	Leela	Username	
Last Name		Employee Type	Sales Executive ▼

Search   **Clear**

G	Mobile Number 9887888898	
Username bn.raghava	Employee Type **Super Management**	
FNO	Mobile Number 9392960669	
Username bn.mgtuser15	Employee Type **Management**	
FNN	Mobile Number 9392960668	
Username bn.mgtuser14	Employee Type **Management**	
FNM	Mobile Number 9392960667	
Username bn.mgtuser13	Employee Type **Management**	
FNL	Mobile Number 9392960666	
Username bn.mgtuser12	Employee Type **Management**	
FNK	Mobile Number 9392960665	
Username bn.mgtuser11	Employee Type **Management**	
FNJ	Mobile Number 9392960664	
Username bn.mgtuser10	Employee Type **Management**	
FNI	Mobile Number 9392960663	
Username bn.mgtuser9	Employee Type **Management**	

5. Click on Search.
6. Leela Record will be displayed.

Add Employee	Search Employee	Import Employee	

First Name	Leela	Username	
Last Name		Employee Type	Sales Executive ▼

Search   **Clear**

Leela	Mobile Number 9999912321	
Username bn.leela	Employee Type **Sales Executive**	

7. Click on View Login Details button on the record of Leela
8. A Pop-up with details of login of employee leela will be displayed

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9. Click on Close to Close the Pop-up

Import Employee

A Place to add bulk data to the system by defining the data in a predefined template.

Authenticated user need to select the template with data filled and need to click the Upload button to save all the records to the System.

Screen Design

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1. Drive to Employee Module --> Manage Employee Page --> Import Employee Page link
2. Click on "Choose File" and Browse to the respective Employee Import Template.

3. Click on Upload to save all the records available in the file to the system.

Assign Customer

Assign Customer is a place where we assign few customer to a particular Sales Executive so that the Sales Executive can have a business interaction with that perticular set of Customers.

Assign Customer

To assign a set of customer to a particular Sales Executive.

Screen Flow

Step 1: Select a Sales Executive from the Drop Down against "Sales Executive Name" Label.

Step 2: The left box with the label "Locality" will be populated with all the available Localities available in the system against Customers.

Step 3: Select a Locality in which a Customer need to be assigned.

Step 4: All the Customers available in the selected Locality will be displayed in the right box labeled with "Business Name".

Step 5: Select the Business which need to be assigned against a particulate Sales Executive.

Step 6: Click on "Assign" button to follow the step 3 and step 4, to assign Customers in multiple Localities.

Step 7: Click on "Assign Customer" button to save the selected Business Names against the Sales Executive selected.

Example

To Assign Customer BN A, BN B, BN C, BN D, BN E from Locality Madhapur and BN K, BN L, BN M, BN N, BN O from Kondapur to Sales Executive 'leela'

1. Login as Management / Accountant User
2. Drive to Employee Module --> Assign Customer Page --> Assign Customers Page link

3. Select Sales Executive 'Leela'

4. Select Locality Madhapur

5. Select Business Name: BN A, BN B, BN C, BN D, BN E

6. Click on Assign Button

7. Click on Kondapur Locality.

8. Select Business Name: BN K, BN L, BN M, BN N, BN O

9. Click on Assign Button

10. Click on Assign Customer Button to save the details to the system.

11. A Message Saved successfully will be displayed on save of the record

Assign Customers	Search Assigned Customers

Saved Successfully.

Searching Assigned Customer's

To view all the Customers assigned against a Sales Executive respectively.

All the assigned Customers will be shown in the search Page of the Assign Customers.

Fields Description

Assign Customers	Search Assigned Customers

Employee Names [ ]　　　**Business Names** [ ]

Search　**Clear**

S. No	Field Header	Description	Accepted Values
1	Employee Names	Employee to whom Customers are assigned.	Alphabets

2	Business Names	Customer Name.	Alphabets

Example

To View the Sales Executive leela's Record

1. Login as Management / Accountant User

2. Drive to Employee Module --> Assign Customer Page --> Search Assign Customers Page link.

3. Enter Employee Name as Leela

4. Click on Search

Assign Customers	Search Assigned Customers	
Employee Names	bn.leela	**Business Names**

Search   Clear

| bn.leela | 28-10-2013 | 🔍 🗑 |

Viewing Assigned Customer's

To View the details of Customer's Assigned to Sales Executive.

Example

To View the Customer assigned to Sales Executive leela

1. Login as Management / Accountant User

2. Drive to Employee Module --> Assign Customer Page --> Search Assign Customers Page link.

Assign Customers	Search Assigned Customers	
Employee Names		**Business Names**

Search   Clear

| bn.leela | 28-10-2013 | 🔍 🗑 |
| bn.sleuser1 | 28-10-2013 | 🔍 🗑 |

3. Enter Employee Name as Leela

Assign Customers	Search Assigned Customers		
Employee Names	leela	**Business Names**	

Search   Clear

bn.leela	28-10-2013	🔍 🗑
bn.sleuser1	28-10-2013	🔍 🗑

4. Click on Search

Assign Customers	Search Assigned Customers		
Employee Names	bn.leela	**Business Names**	

Search   Clear

bn.leela	28-10-2013	🔍 🗑

5. Click on View icon on Leela Record to view all the customers assigned to leela

6. A pop-up with the customer details Assigned to Leela

Employee Details

bn.leela   28-10-2013

S.No	Business Name	Locality	Contact Number
1	BN A	Madhapur	9885365841
2	BN B	Madhapur	9885365842
3	BN C	Madhapur	9885365843
4	BN D	Madhapur	9885365844
5	BN E	Madhapur	9885365845
6	BN K	Kondapur	9885365851
7	BN L	Kondapur	9885365852
8	BN M	Kondapur	9885365853
9	BN N	Kondapur	9885365854
10	BN O	Kondapur	9885365855

Close

7. Click on Close to close the pop-up

Deleting Assigned Customer's

To Delete assigned customers to a Sales Executive.

Example

To Delete Customer's "BN N" and "BN O" assigned to Sales Executive Leela.

1. Login as Management / Accountant User
2. Drive to Employee Module --> Assign Customer Page --> Search Assign Customers Page link.

Assign Customers	Search Assigned Customers			
Employee Names [ ]	**Business Names** [ ]			
	Search Clear			
bn.leela	**28-10-2013**		🔍 🗑	
bn.sleuser1	**28-10-2013**		🔍 🗑	

3. Enter Employee Name as Leela

Assign Customers	Search Assigned Customers			
Employee Names [leela]	**Business Names** [ ]			
	Search Clear			
bn.leela	**28-10-2013**		🔍 🗑	
bn.sleuser1	**28-10-2013**		🔍 🗑	

4. Click on Search

5. Click on Delete icon on Leela Record to select and to delete customers assigned to leela.

6. A pop-up with the customer details Assigned to Leela will open.

7. Check the Delete Check-Box with Respective to Business Name: "BN N" and "BN O".

Employee Details

bn.leela   **28-10-2013**

S.No	Business Name	Locality	Contact Number	Delete
1	BN A	Madhapur	9885365841	☐
2	BN B	Madhapur	9885365842	☐
3	BN C	Madhapur	9885365843	☐
4	BN D	Madhapur	9885365844	☐
5	BN E	Madhapur	9885365845	☐
6	BN K	Kondapur	9885365851	☐
7	BN L	Kondapur	9885365852	☐
8	BN M	Kondapur	9885365853	☐
9	BN N	Kondapur	9885365854	☑
10	BN O	Kondapur	9885365855	☑

Delete   **Close**

8. A Message "Deleted Successfully" will be displayed and the Customer's will be unassigned to Sales Executive Leela.

| Assign Customers | Search Assigned Customers | |

Deleted Successfully.