Help Manual

Admin User Guide

Total Pages :

Guj Info Petro Limited

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1.) Login

- Enter the appropriate credentials and click on sign in button.

- Once user will logged in, they are redirect on the admin dashboard page.

2.) Dashboard
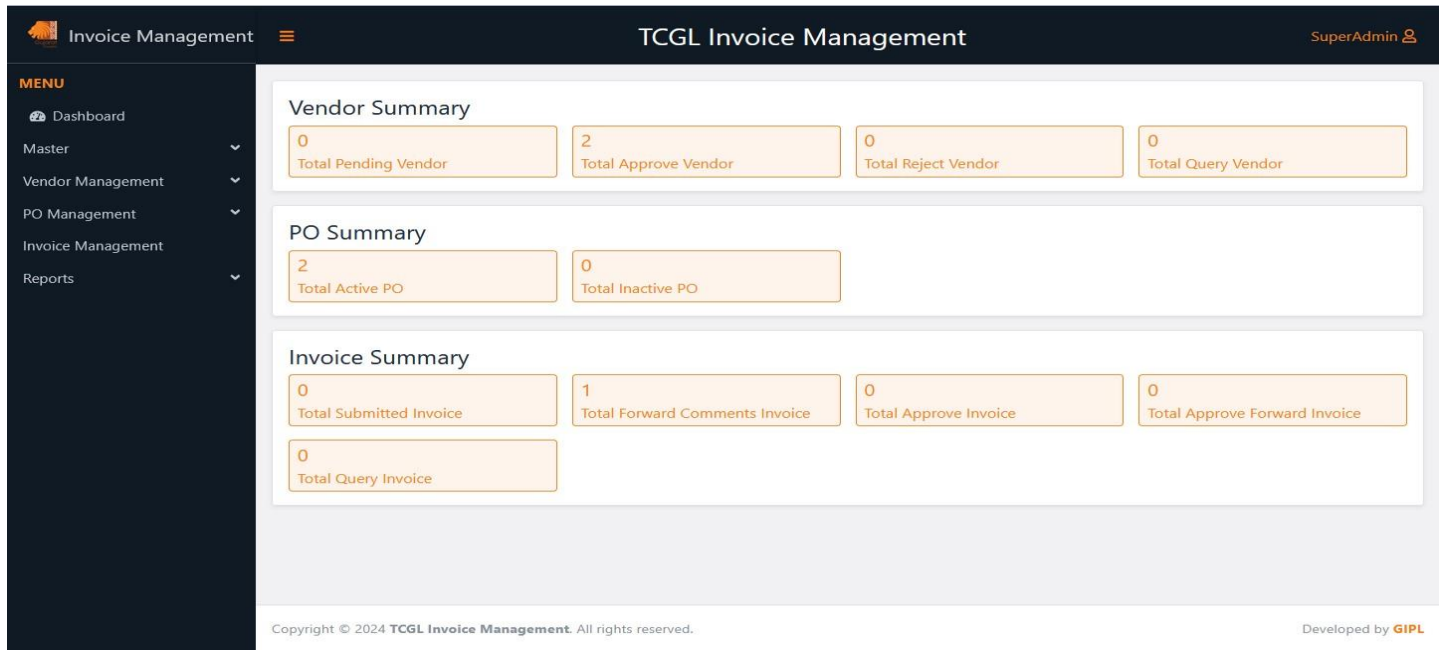
- Admin dashboard, user can see the vendor summary, PO Summary and invoice summary.

3.) Users

- Click on master and view user buttons.

- User can search the details by employee name and status Active or Inactive Status, or by user role.

4.) Bank Master

- Vendor enter the bank details

- Click on save button records will be saved successfully.

- In addition, admin user can edit or delete record details.

- In addition, admin user can search the records by search button.

5.) Grant type

- User can add the grant type details using this form.

- Click on add grant type button to add records.

- In addition user can edit, delete record, also user can search the record by search button.

6.) Major Head

- User can add the major head details using this form.

- Click on add grant type button to add records.

- In addition user can edit, delete record, also user can search the record by search button.

- Major head details are used when Created PO details.

7.) Sub Head Details

- User can add the Sub head details using this form.

- Click on add grant type button to add records.

- In addition user can edit, delete record, also user can search the record by search button.

- Sub head details are used when Created PO details.

- Click on (i) icon to see the details of sub head details.

- Click on (+) add opening button user can add the balance details.

8.) Minor Head Details

- User can add the Minor head details using this form.

- Click on add Minor Head Details button to add records.

- In addition user can edit, delete record, also user can search the record by search button.

- Sub head details are used when Created PO details.

9.) Department Mapping

Branch Mapping Details

| Sr. No.	Branch Name	Initiator Name	Branch Head Name	Is Zone Branch?	Action
1	HR			No	👤
2	Business Development			No	👤
3	Finance	Ms. Pratima Rameshbhai Muniya	Mr. Rakeshbhai Sangada	No	👤
4	Audit			No	👤
5	Event			No	👤
6	Commercial			No	👤
7	Gujarat Tourism Policy			No	👤
8	GM Branch			No	👤
9	MD Section			No	👤
10	Promotions			No	👤
11	Skill Development			No	👤
12	Projects			No	👤
13	Legal & Land			No	👤
14	Chaiman Office			No	👤
15	Sachivalaya			No	👤
16	COT			No	👤
17	Other			No	👤

- Admin user can mapped the employee details branch wise.

- All branch data should be display here.

- Admin user can click on the action button, Change User type popup will be display.

- Selected the Initiator, Department head and Remarks comments and click on the change button branch wise Initiator and Branch head name should be changed.

10.) Add PO Details

- Admin or department user can add the PO details using this form.

- Enter the PO Details and click on the submit button details.

- If previous payment is done then check the check box text box should be open enter the amount and click on the submit button.

- Previously added amount should be display in the grid view.

- Once PO is created then it will be display on the Invoice otherwise invoice will not be created.

11.) View PO Details

- Admin can view the PO Details.

- User can search the PO details with different data sets.

- In addition, user can see the uploaded document; also, user can edit or delete the records.

12.) Bank Upload Report

- Admin can see the Bank report.

- Finance year wise and vendor wise report should be display in search report.

- Click on export to excel button to download excel report.

13.) Invoice Management

- Created invoice should be display in invoice management.

- Click on view button user can see the invoice details.

- If invoice payment is done user can download the invoice payment report.

- If multiple invoices should be added then user can download multiple invoice at a same time click on bulk download report.