



EIS Application

User Manual

A Comprehensive and Complete User's Guide of the EIS app.

2019

EIS ENTERPRISES

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Organization of the manual

Our user manual consists of four sections these sections will include, General information section, and system summary, getting started section and using the system section.

The general information will explain what the app is all about and the purpose it is intended for.

The app summary section will provide a general overview of the system. It will also outline the hardware and software requirements required for the app to function properly.

The getting started section will explain how to locate the app and also how to install it on the device.

Using the system section will provide a detailed description of how to use the app and also how to engage the different functionalities.

General information

For entrepreneurs and business professionals, the game has changed. With the increasing demand for productivity in the business world, the incorporation of top-notch technology has been a true game-changer. Whether on a flight, preparing in a hotel or riding an Uber, today's suave entrepreneur can work from anywhere in the globe courtesy of this technology. With agile working being adopted throughout the enterprising world a business app is the perfect tool to help you manage not only your workforce but also the various projects at hand.

System summary

EIS app is a simple seamless and most effective web application designed to help you streamline your business operations thus making your day less stressful and highly

productive. This is achieved through merging all the business functionalities in one single dashboard thus allowing you to see everything at a glance. The EIS app allows you to keep track of your clients, have a clear insight into your leads, and manage your employees just to mention a few of the vital functionalities of the app.

EIS app is not only precise in matters managing your venture affairs but is also a powerful tool customized to competently keep track of everything. With this app, you are guaranteed a smooth analysis and cooperation of the venture's affairs while also enabling you to stay on the loop through managing your business on the go.

Getting started

How does EIS app work?

EIS app developers insist that simplicity is key, this is reason enough why the app is not only easy to install but also to use. The app works seamlessly on both mobile phones and desktop environment thus allowing you to monitor and run your business no matter where life takes you.

Downloading and installation

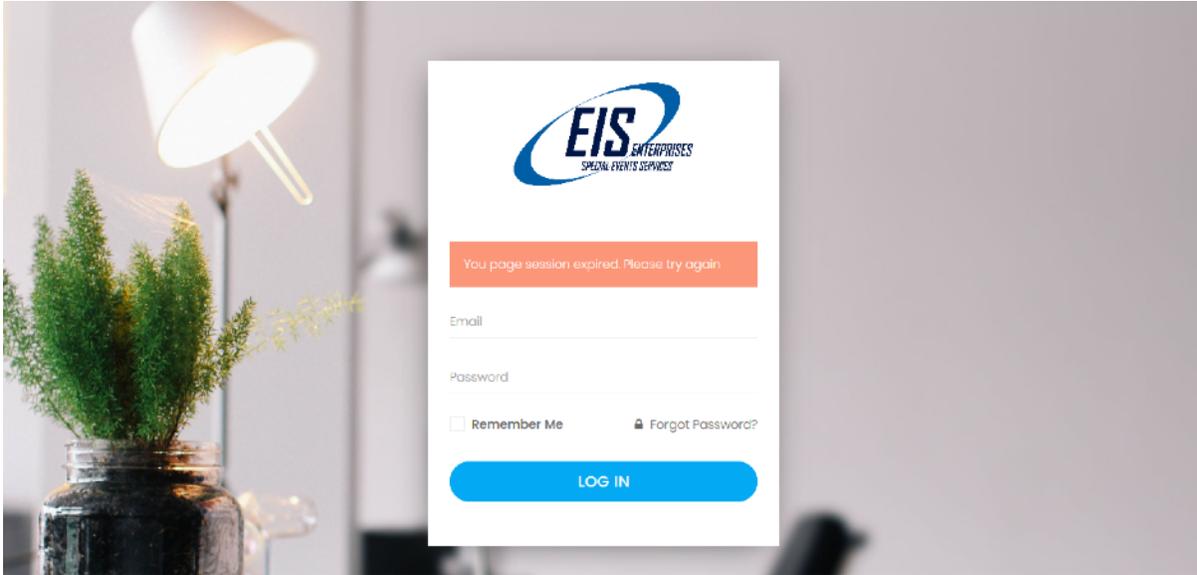
EIS is a very intuitive and responsive web app that operates on both mobile phones and desktop platforms. It is compatible with Android (All Versions). This application will require some internet during downloading and installation. Upon installation, the app can be used immediately without any further configuration.

Using EIS app

Logging in

Upon downloading and installing the app, you are now ready to log in. To do this, simply locate the app icon on the screen of your phone/tablet and click on it.

Ushering you into this wonderful platform is a simple yet comprehensive sign up panel. To log in simply fill in your correct authentication details. This will include a valid email address and a strong correct password.



A screenshot of the login panel

Upon filling in the details in the allocated tabs click on the login tab located below the panel.

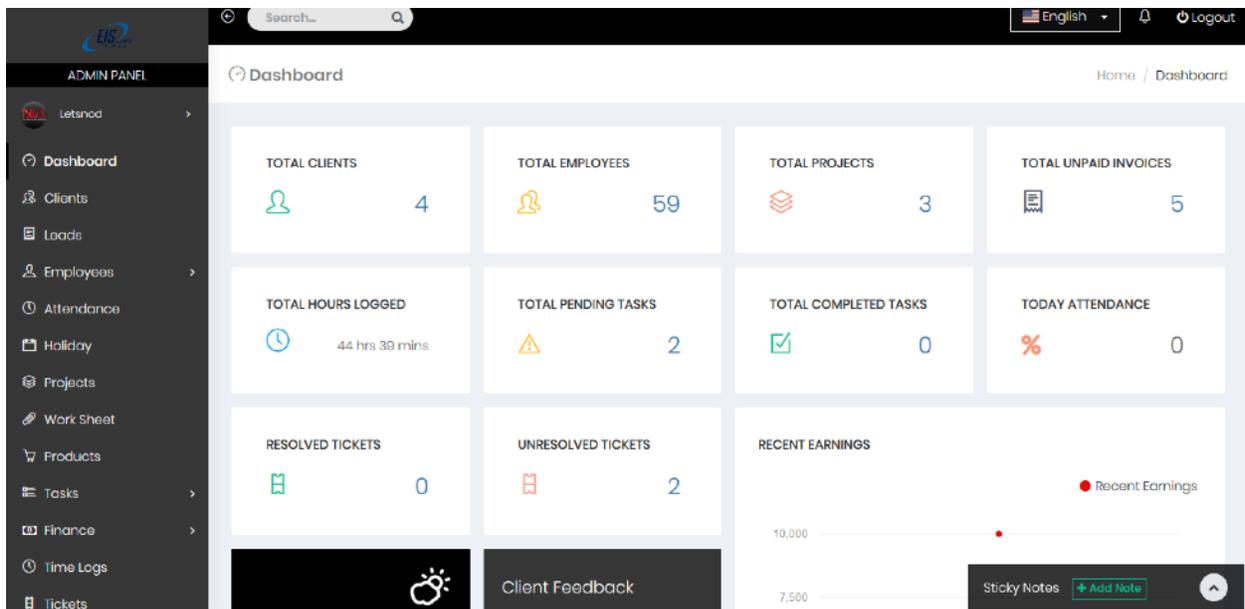
In case you don't remember your password you can click on the 'Forgot Password' tab. This option will direct you on how to get a new password.

Upon logging using a valid email address and a correct user password. The EIS app dashboard will appear.

The ESI dashboard is a graphical user interface designed to help users have a glance view and monitor key activities and processes of the app.

On the left side of the dashboard, you have the Admin Panel. This panel outlines the different sections addressed by the app. An admin/user can access any section on the panel by simply clicking on it.

The clicked/selected section will immediately appear on the larger right-hand section complete with all the details of the selection click on the admin panel.



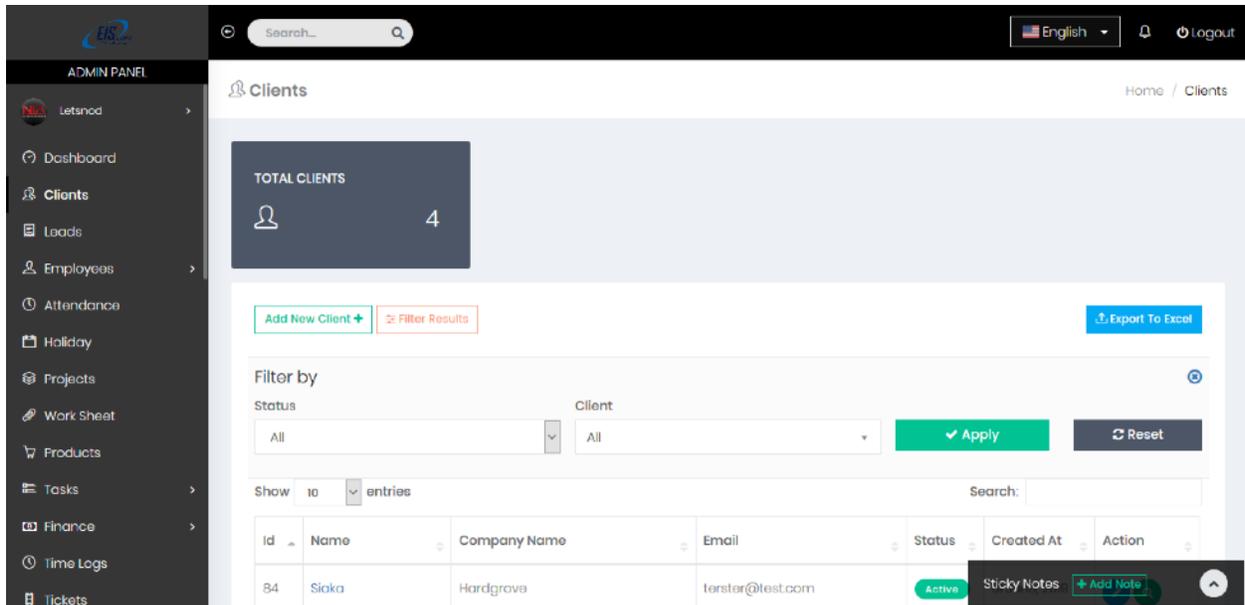
ESI dashboard screenshot

Clients

On the 'Clients' panel a user can:

- Register a new client
- Know the number of clients registered in the system. This is reflected on the 'Total Clients' tab which is located on the upper right hand side of the panel.
- Know the names, company names, email address and status of the already registered clients.

Admin panel>Client



Screenshot showing the 'Clients' panel

Adding a new client

With the EIS app, the user/admin has the right and privilege of adding new clients to the system.

To add a new client the user will be required to click on the 'Add new client' tab on the 'Client panel'.

Upon clicking on the 'Add new client' tab the EIS app will direct you to a new panel where you can register the details of the new client.

Admin panel>Client>Add New Client

The screenshot shows the 'Add New Client' panel in the EIS Admin Panel. The panel is divided into two main sections: 'COMPANY DETAILS' and 'CLIENT DETAILS'. The 'COMPANY DETAILS' section includes fields for Company Name, Website, and Address. The 'CLIENT DETAILS' section includes fields for Client Name, Client Email, Password, Mobile, Skype, LinkedIn, Twitter, Facebook, and a Note. There is also a 'Log In' dropdown menu and 'Save' and 'Reset' buttons at the bottom. A sticky note with '+ Add Note' is visible on the right side.

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Screenshot showing the 'Add new client' panel

The 'Add New Client' panel is divided into two sections which include:

Company details- here the user will key in the company name, website and the address of the client to be registered.

Client details- under this section the admin/user will key in the client information including the name, email address, mobile number, social media links and the client user password.

Note- the user password can either be chosen by the admin/user or can be generated randomly by the system.

The 'Log in' tab located below the panel has a drop down menu consisting of 'Enable' and 'Disable' parameters. To ensure that your client is successfully added ensure that this tab is set at the 'Enable' parameter.

Upon correctly filling all the new client's details, the user can now successfully add the new client. This is done by clicking on the 'Save' tab located on the lowest left side of the panel.

The 'Reset' tab allows a user to reset the set of data in the panel. This can be used to delete the details of a client.

Client Search

For an easier client search the user can click on the 'Filter Results' tab.

The user can search using the 'Status' parameter which include either 'Active' or 'Deactive' options or the 'Client' parameter, with this parameter the user can select the exact client s/he wants to view.

Upon setting the parameters the user will click on the 'Apply' tab, with this a comprehensive list of the clients under the set parameters will appear.

Admin panel>Client>Filter Results

[Add New Client +](#)
[Filter Results](#)
[Export To Excel](#)

Filter by ⊞

Status:
 Client:
[Apply](#)
[Reset](#)

Show entries
 Search:

Id	Name	Company Name	Email	Status	Created At	Action
84	Siaka	Hardgrove	terster@test.com	Active	01 June, 2019	Edit Search Delete
87	Abhinav Saraswat	Froiden Technologies Private Limited	abhinav@froiden.com	Active	13 July, 2019	Edit Search Delete
88	12 BY EVENT FLOORING	12 BY EVENT FLOORING	sinairivas@gmail.com	Active	16 July, 2019	Edit Search Delete
89	Letsnod	Test Client 2	stogola@auwashingtondc.org	Active	08 August, 2019	Edit Search Delete

‘Filter Results’ screenshot

The screenshot above shows a list of clients presented when the ‘Status’ parameter is set at ‘All’. The ‘Client’ parameter is also set at ‘All’.

Leads

Lead generation is crucial if you want to make more sales; however, learning how to manage leads may be easier said than done. With the EIS app you can now track and optimize the entire lead generation process, in the long run, this will only help you create qualified opportunities through conversion but also create ultimately satisfied clients.

Accessing the ‘Leads’ panel

To access the ‘Leads’ panel simply click on the ‘Leads’ tab located just below the ‘Clients’ tab on the ‘Admin panel’. Upon completing the action, a panel similar to the one shown below should appear.

Admin Panel>Leads

The screenshot shows the 'Leads' panel in the Admin Panel. At the top, there are three summary boxes: 'TOTAL LEADS' (1), 'TOTAL CLIENT CONVERT' (0), and 'TOTAL PENDING FOLLOW UP' (0). Below these is a table with one lead entry. The table has columns for Id, Client Name, Company Name, Created On, Next Follow Up, Status, and Action. The lead entry has Id 1, Client Name 'NOD IN ACQUIESCENCE', Company Name 'NOD IN ACQUIESCENCE', Created On '03 Jan, 2019', Next Follow Up '--', Status 'pending', and an 'Action' button. There are also buttons for 'Add New Lead', 'Filter Results', and 'Export To Excel'. The sidebar on the left contains navigation options like Dashboard, Clients, Leads, Employees, etc.

Leads panel screenshot

On the 'Leads' panel you can:

Know the total number of leads available-this is shown by the 'Total Leads' box on the top of this panel.

Know the total clients convert-this is shown by the 'Total client convert' blue box on the top of this panel.

Know the total number of pending leads requiring some follow up-This is depicted by the orange box located on the top of the panel.

Adding a New Lead

Leads> Add New Lead

The screenshot shows the 'Add New Lead' form in the EIS App. The form is titled 'leads' and is located in the 'ADMIN PANEL' under the 'Leads' menu. The form is divided into two main sections: 'COMPANY DETAILS' and 'LEAD DETAILS'. The 'COMPANY DETAILS' section includes fields for 'Company Name', 'Website', and 'Address'. The 'LEAD DETAILS' section includes fields for 'Client Name', 'Client Email', 'Mobile', and 'Next Follow Up' (Yes/No). There is also a 'Note' field and a 'Sticky Notes' section with an 'Add Note' button. The form has a 'Save' button and a 'Reset' button at the bottom. The footer of the page reads '2019 © EIS Enterprises'.

‘Add New Lead’ panel screenshot

The ‘Add New Lead’ panel is divided into two sections these include:

Company details- in this section the user will key in all the client’s company details including the name of the company, the company’s website and the company’s address.

Lead Details- under this section, the user will key in the name of the client, the client’s email, mobile phone number.

The 'Next Follow up' tab contains a drop down arrow. This allows the user to either opt or decline a follow up. This is done by either using the 'Yes' or 'No' option.

The 'Note' tab allows the user to take some important info which may prove to be useful in lead conversion.

Upon registering all the lead key details the final step is to save this info. To do this simply click on the 'Save' tab which is located on the lowest left side of this panel.

Doing this will update the leads list while also updating the metric boxes in relation to the input lead data.

The 'Reset' tab located next to the 'Save' tab allows you to reset the set of lead data in the panel. This can be used to delete the details of a lead.

Searching for a lead

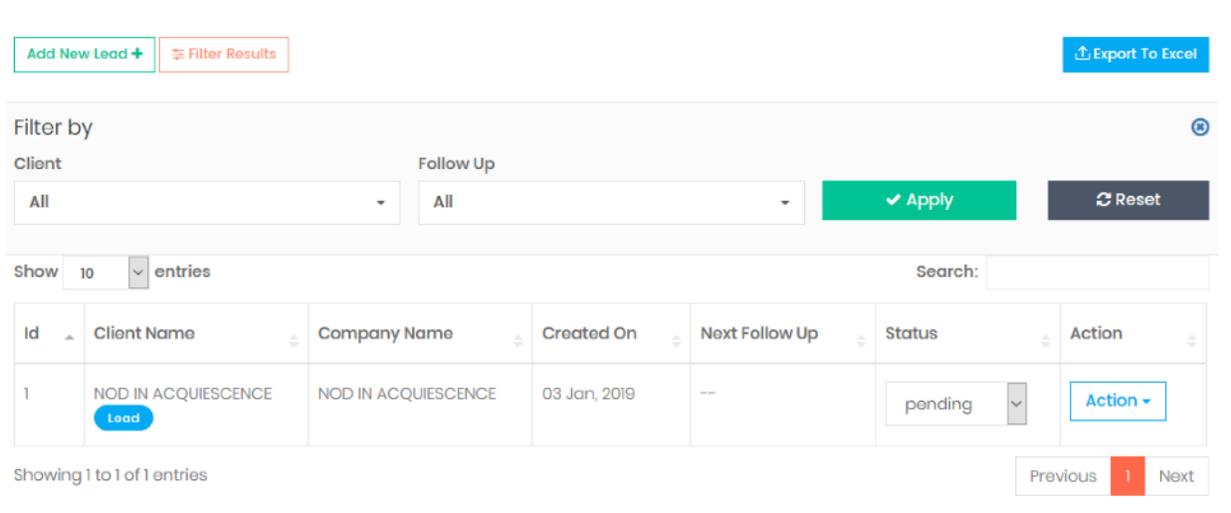
The 'Leads' panel can also be used to successfully search or lookup for some lead information.

The 'Leads' panel shows the various leads who are already in the system. From the list, a user can identify the name of the client, his/her company, the date the client was keyed into the system while also noting the status of the client.

The 'Action' section on the entries list allows a user to choose what s/he wants to do with a certain entry. By clicking the drop-down menu on the 'Action' section a user can either, view, edit, change to a client or add follow up a certain entry.

However, for a more refined search, the user can click on the 'Filter Results' tab which is located just next to the 'Add New Lead' tab.

Admin panel>Leads>Filter Results



Screenshot showing a filter results display

The user can either filter by using the ‘Client’ parameter whereby s/he can choose either a display of ‘All’, ‘Lead’ or ‘Client’.

The user can also filter the results by using the ‘Follow up’ parameter. Under this parameter the user can either choose ‘All’ or ‘pending’ search.

Upon deciding on the parameters, click on the ‘Apply’ tab. This will display the required results.

The ‘Reset’ tab resets the parameters set to the original.

Employees

Employees are a company’s greatest asset; they are your competitive advantage. Our EIS app is concerned about making your employees an integral part of your company thus making them more productive, more satisfied and more fulfilled.

The ‘Employees’ tab is located on the ‘Admin Panel’ just below the ‘Leads’ tab. This tab has a drop-down menu which contains:

Employee List- this gives an overview of the number of employees registered in the system, their roles and their status.

Teams- this comprises of the teams available in the system, the number of members in the respective teams and the desired action.

Adding a new employee

To add a new employee, simply click on the 'Employee List' tab. This will direct you to a panel similar to the one shown below.

Admin Panel>Employees

The screenshot displays the 'Employees' panel in the Admin Panel. The sidebar on the left contains navigation options: Dashboard, Clients, Loads, Employees (selected), Employee List, Teams, Attendance, Holiday, Projects, Work Sheet, Products, Tasks, and Finance. The main content area features a search bar at the top, a 'TOTAL EMPLOYEES' metric box showing 59, and buttons for 'Add New Employee', 'Filter Results', and 'Export To Excel'. Below these is a table with columns for Id, Name, Email, User Role, Status, Created At, and Action. The table contains two rows of employee data.

Id	Name	Email	User Role	Status	Created At	Action
1	Letsnod	baz@letsnod.com	Role of this user cannot be changed.	Active	November 07, 2018	[Action icons]
15	Siaka	siaka@letsnod.com	Admin	Active		[Action icons]

Employees' panel screenshot

In the 'Employees' panel, the metric box on the top left shows the number of employees available.

Adding a New Employee

To add a new employee click on the 'Add New Employee' tab located below the 'Total Employees' metric box.

Employee>Employee List>Add New Employee

The screenshot shows the 'Add Employee' form in an admin panel. The form is titled 'ADD EMPLOYEE INFO' and includes the following fields and options:

- Employee Name**: Text input field.
- Employee Email**: Text input field with the note 'Employee will login using this email'.
- Password**: Text input field with a checkbox for 'Generate Random Password' and the note 'Employee will login using this password'.
- Mobile**: Text input field.
- Slack Username**: Text input field with an '@' icon.
- Joining Date**: Date input field.
- Gender**: Dropdown menu with 'male' selected.
- Address**: Large text area.
- Job Title**: Text input field.
- Hourly Rate**: Text input field.
- Log in**: Dropdown menu with 'Enable' selected.
- Profile Picture**: Image upload area with a 'Select Image' button.

At the bottom of the form are 'Save' and 'Reset' buttons. A 'Sticky Notes' widget is visible on the right side of the form.

2019 © EIS Enterprises

‘Add new employee’ panel screenshot

In the ‘Add Employee’ panel the user can now key in the employees details in the respective fields provided by the system. These different fields include:

- Name of employee
- Email address of employee
- Password- this can be generated by the system and will be used by the employee to log in
- Mobile number
- Slack Username
- Joining date

- Gender- Use the drop down menu to select the correct gender.
- Address
- Hourly rate
- Profile picture

The 'Login' tab contains a drop-down menu while registering an employee a user should always ensure that the 'Enable' parameter is set.

An admin/user can set the 'Disable' parameter when s/he wants to block a certain employee's access.

Profile picture- to set an employee's profile picture, simply click on the 'Select Image' tab located just below the picture box. This will help the admin/user to choose and upload an employee's image.

Upon registering all the employees' key details the final step is to save this info.

To do this simply click on the 'Save' tab which is located on the lowest left side of this panel.

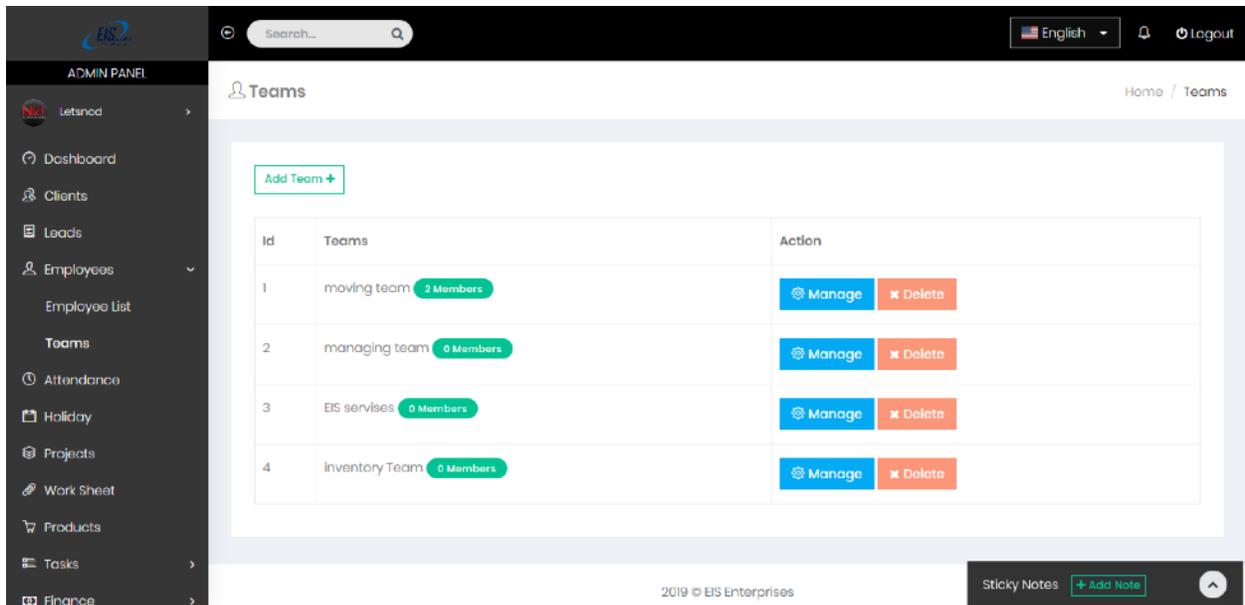
Doing this will update the employees' list while also updating the employee metric box.

The 'Reset' tab located next to the 'Save' tab allows you to reset data in the employee panel. This can be used to delete all the details of an employee.

Teams

To locate the 'Teams' panel simply click the 'Teams' tab located on the Admin Panel.

Admin Panel Employees> Teams



Team panel screenshot

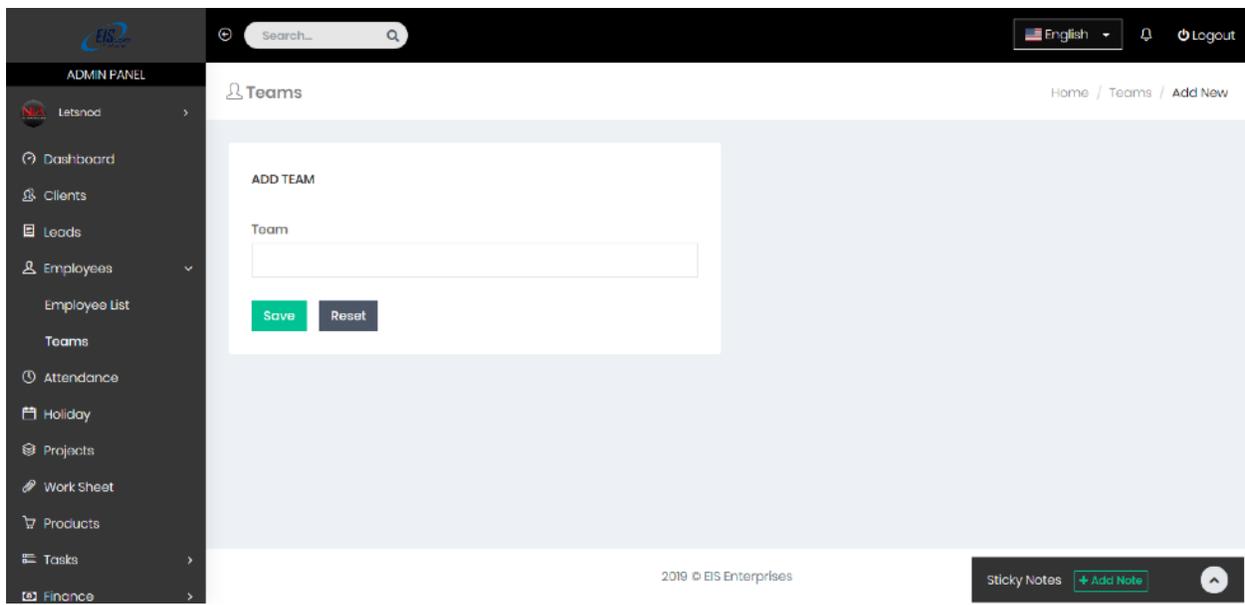
In the 'Teams' panel a user can:

- Add a team
- Know the name of the teams and the number of team members in the respective teams.
- Carry out a desired action, this action can include managing or deleting a team.

Adding a team

To add a team a user will simply click on the 'Add Team' tab located on the left hand side of the panel.

Admin panel>Employees>Teams>Add Team



Screenshot showing 'Add team' panel

Key in the name of the team in the empty tab provided.

To save the name of your team click on the 'Save' tab. This will return you to the original 'Teams' panel. You can view the name of the team you have added.

Adding members to your team

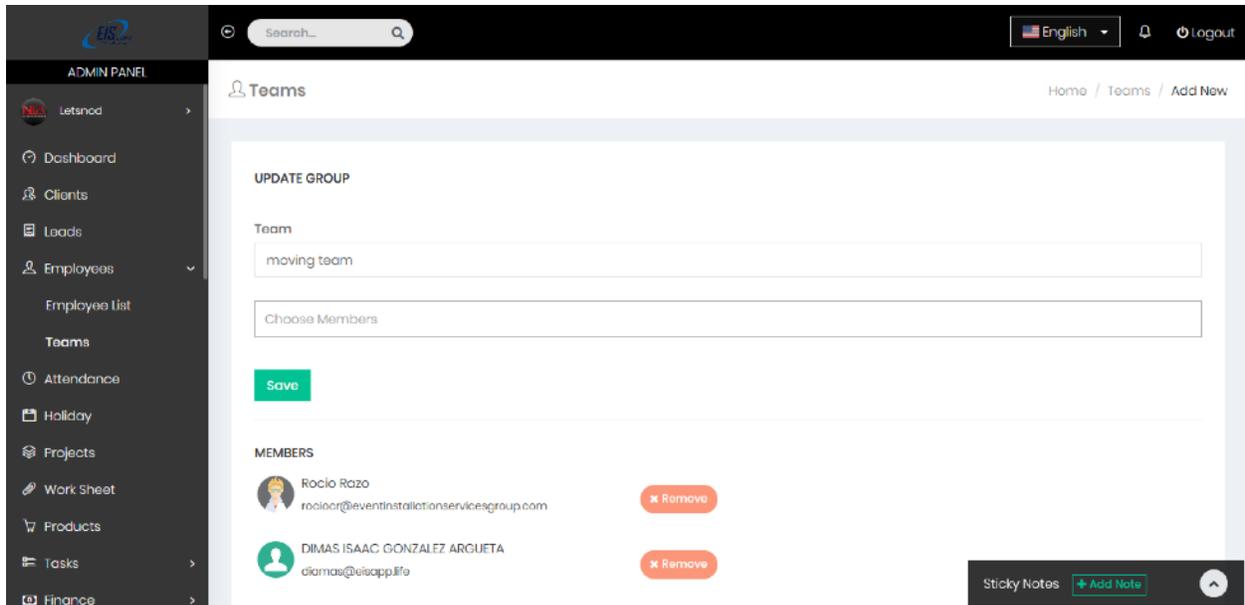
To add members to the team created a user will:

Go to the 'Teams' panel

Below the 'Add Team' tab a user can view the name of the teams included

On the 'Action' section click on the 'Manage' tab.

Admin panel>Employees>Teams>Manage



Screenshot showing the team manage section

This panel consists of two sections they include Update Group section and the 'Members' section.

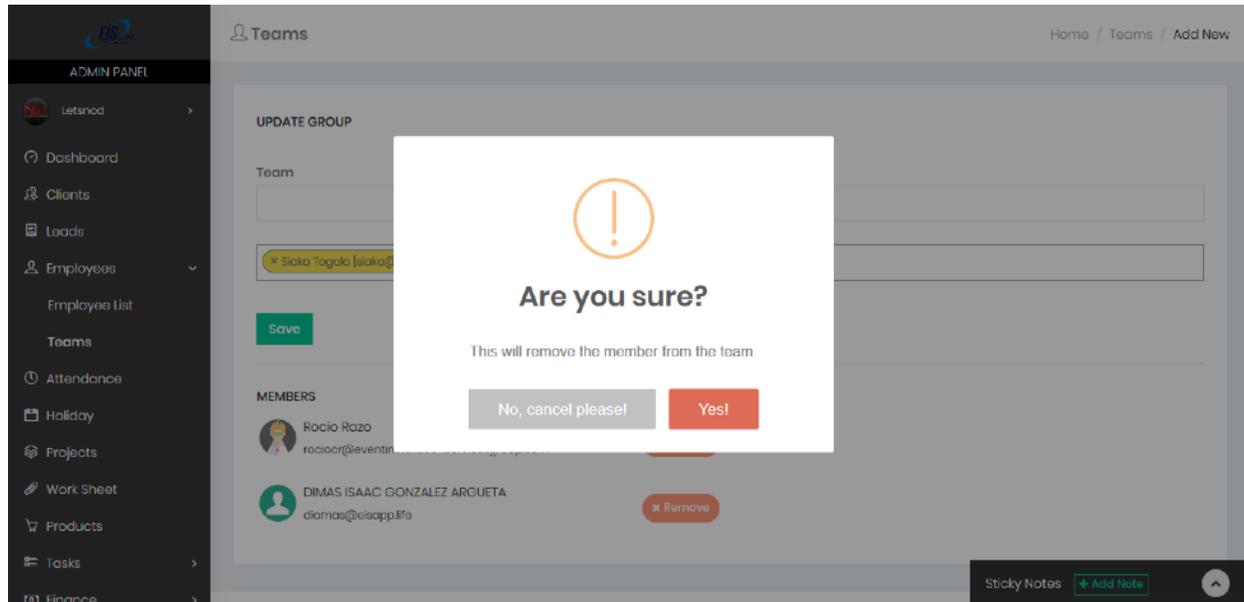
To update members of a certain team a user will:

- Indicate the name of the team on the 'Team' tab, for instance 'Moving Team'.
- The user will then update the members of the team by clicking on the 'Choose Members' tab. This action will trigger a drop down menu complete with a list of people registered in the system.
- From this list, you can select the members who are to be in a certain team.

The user can also remove a certain member from a certain team. This is done in the 'Members' section.

Here the user will simply click on the 'Remove' tab located next to details of the members.

Admin Panel>Employees>Teams>Manage>Remove



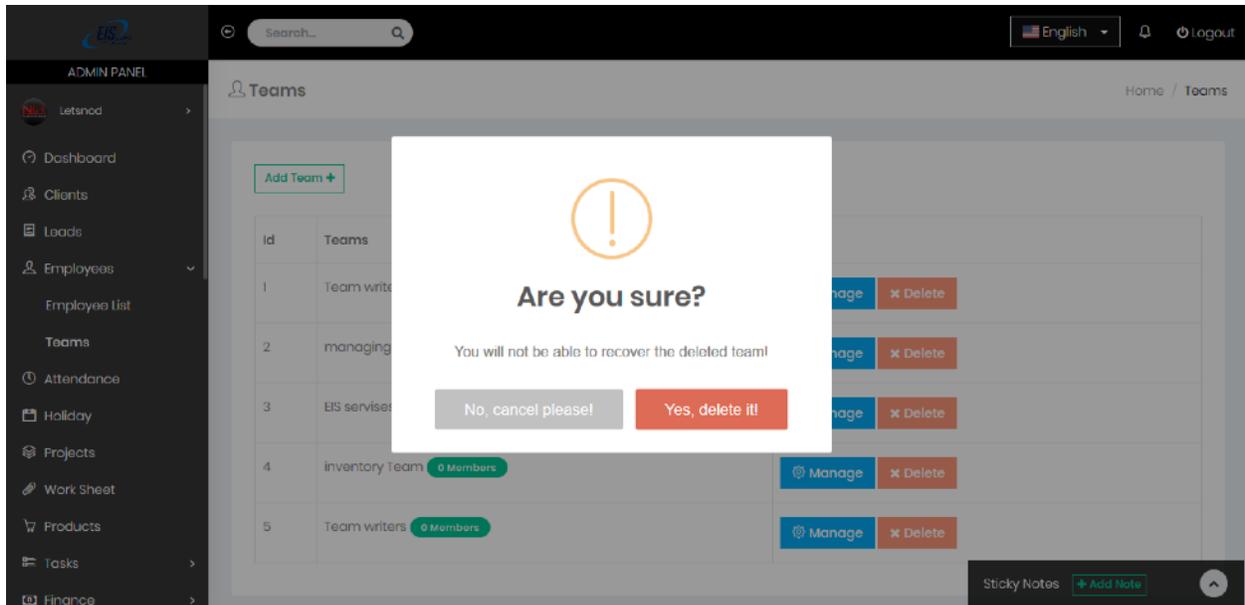
Screenshot showing a member removal process

A dialog box inquiring whether the user wishes to remove the selected member from the team will appear. The user can either confirm or cancel the process.

Deleting a team

The user can entirely delete a team from the system. To do this, a user will have to access the 'Teams' panel. The user will then click on the 'Delete' tab which is located on the 'Action' section.

A dialog box similar to the one shown below will appear.



Screenshot showing how to remove a team process

On the dialog box displayed the user can either confirm or decline the action.

Note you will not be able to recover the team upon deleting.

Attendance

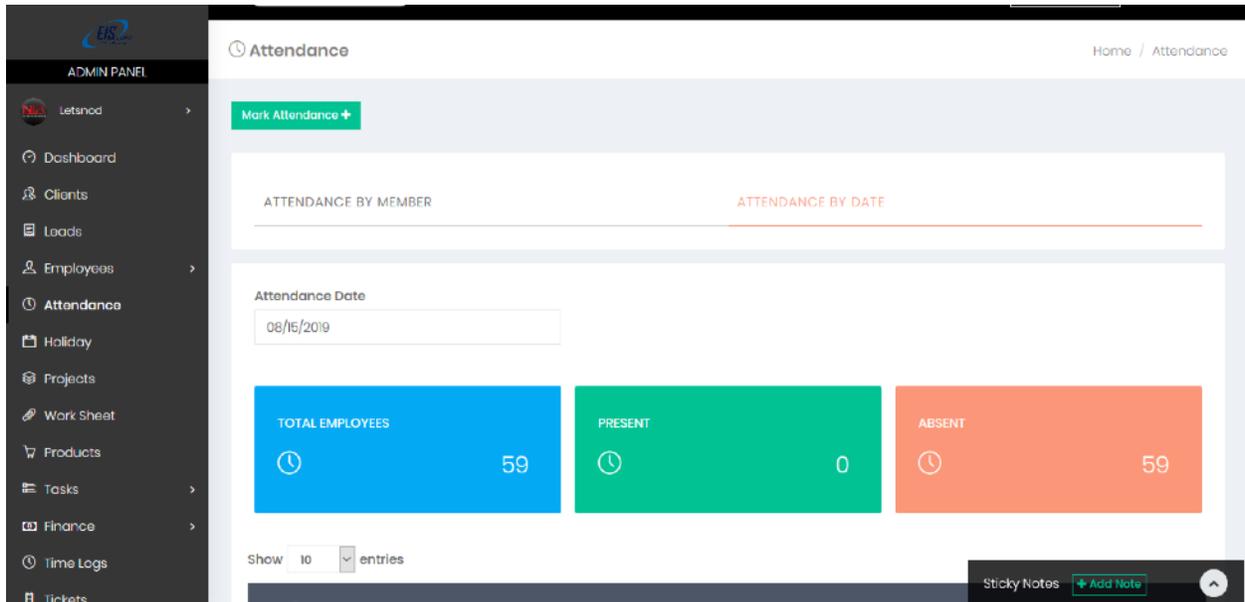
Employees should be judged on their merit and hard work. The EIS app allows its users to have a clear glimpse of the staff/employees attendance this in turn helps in creating a climate for greater morale commitment and company growth.

The 'Attendance' Tab is located on the Admin panel just below the 'Employees' tab.

On the 'Attendance' Panel the user can:

- Mark the Attendance
- View the staff attendance using the given parameters.(by member or by date)

Admin Panel>Attendance

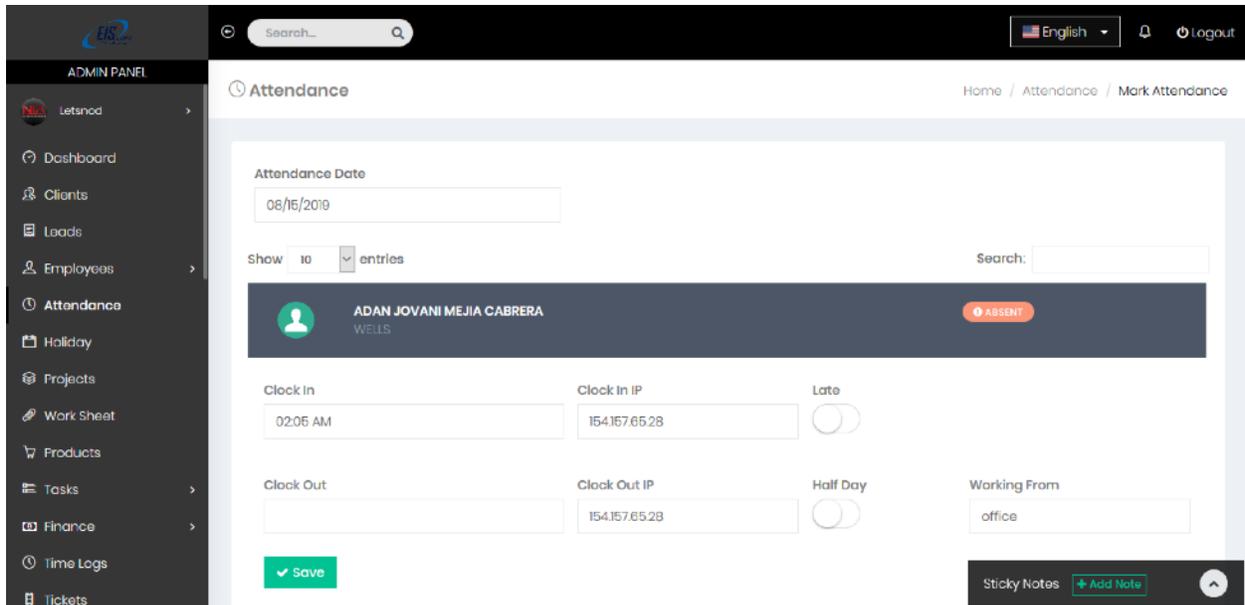


Screenshot showing an 'Attendance' panel

Marking attendance

On the 'Attendance' panel the user will be required to click on the 'Mark Attendance' tab located on the top left side of the panel.

Admin panel>Attendance>Mark Attendance



Screenshot showing the 'marking attendance' panel

This 'Mark Attendance' panel consists of:

Attendance date- this tab shows the present date. In case the user/admin is interested in knowing how the attendance was at a certain date s/he can simply key in the preferred date the attendance of all the staff/employees will be shown.

Entries section-This section contains the name of the staff/employee. Under this section, the user/admin can record the attendance using the given parameters.

Clock in- user/admin records the time the staff aforementioned has arrived in the office

Clock out-user/admin records the time the staff/employee has signed out

Late switch-user/admin can always use the 'Late' switch to raise a red flag when a staff/employee is late.

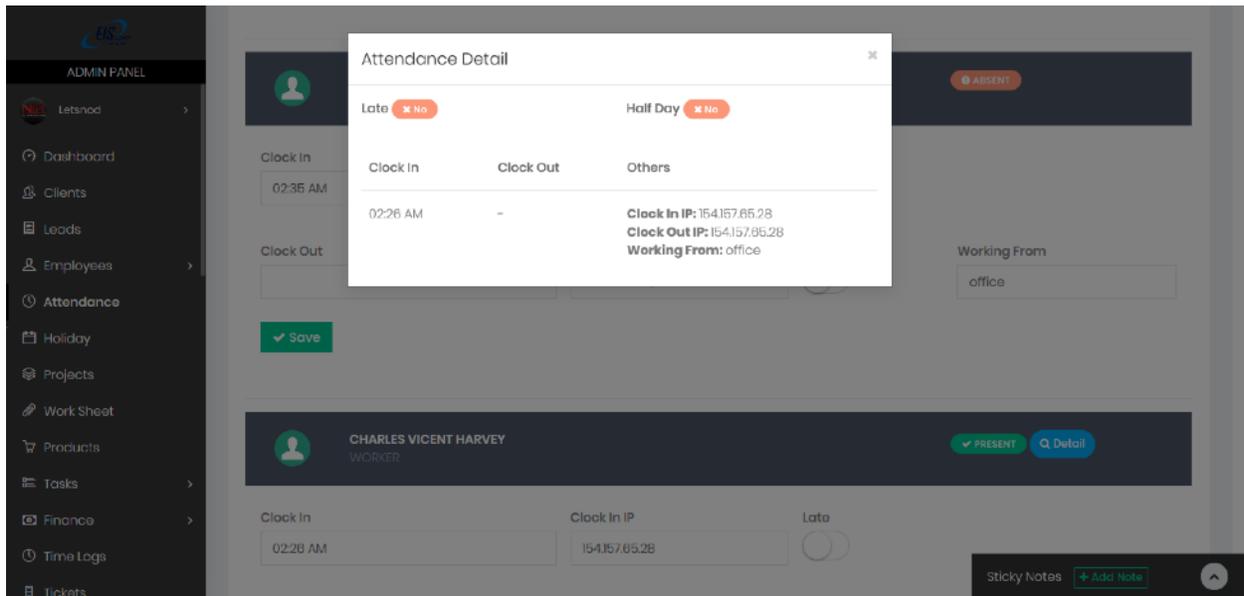
Half-Day Switch- user/admin will use this switch to indicate that the aforementioned employee has only worked for half a day.

Working From- This tab allows the user/admin to indicate where the employee was working. It can either be working from the office, working from home, in the field etc. Upon keying in a certain employee/staff attendance data. The user will click on the 'Save' tab.

Note- Perform this action for each employee/staff in the system while saving at each step.

Upon saving the 'absent' tab located on the far right of each entry will be placed by the 'present' and the 'detail' tab.

Clicking on the 'detail' tab of a certain entry is a good shortcut to view all the attendance details of that entry in a simplified panel.



Screenshot showing the attendance details

Viewing the staff attendance

With the EIS app a user can view the attendance of the employees/staff.

On the 'Attendance' panel the user can opt for a suitable parameter. The parameters include:

1. Attendance by member parameter

When a user clicks on this tab the user will have to select a date range, choose the employee name and then click on the 'Apply' tab.

Upon clicking on the 'Apply' tab the metric boxes will provide a simplified analysis of the selected employee total working days, absent days, days late, holidays etc.

Below the metric boxes a further analysis showing the respective dates, status, clock, clock out an others will also be displayed.

Admin panel>Attendance>Attendance by member

Date	Status	Clock In	Clock Out	Others
August 15, 2019 Thursday	Absent	-	-	-

Screenshot showing 'Attendance by member' option

2. Attendance by date

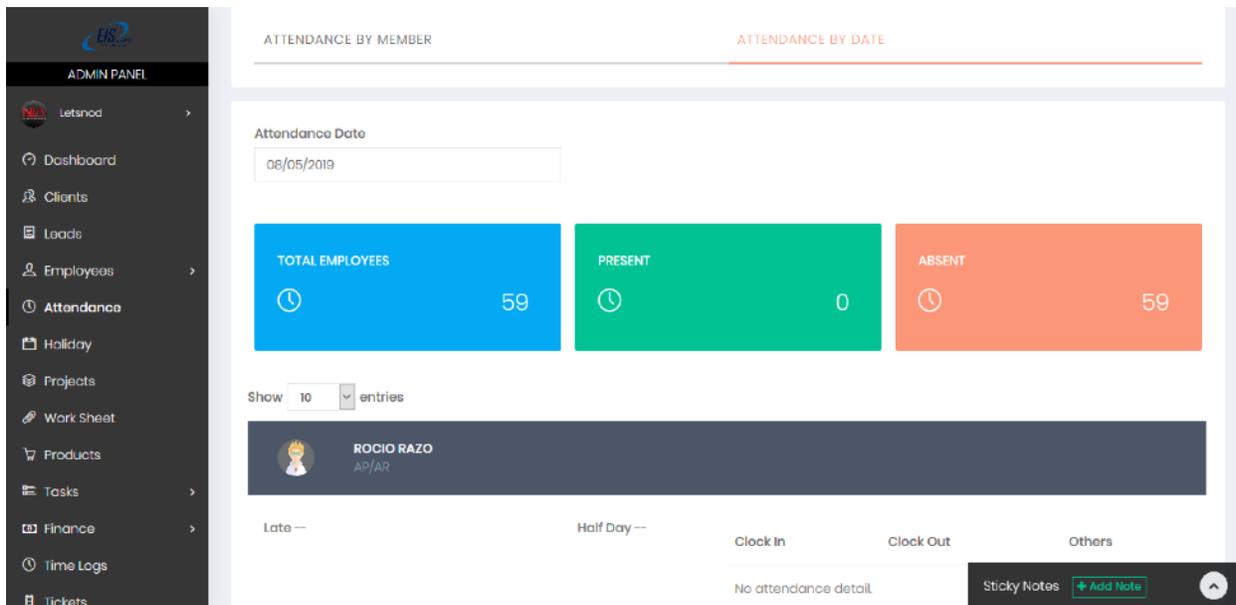
To view the employees/staff attendance by date, the user will simply click on the 'Attendance by Date' section. This is alongside the 'Attendance by member; section.

With this the user can now key in the date which s/he want to know about in the 'Attendance Date' tab.

The metric boxes located below the 'Attendance Date' tab shows a simplified analysis of the attendance data.

Below the metric boxes, the user can now have a detailed and comprehensive analysis of the attendance in the set date.

Admin Panel>Attendance>Attendance by date



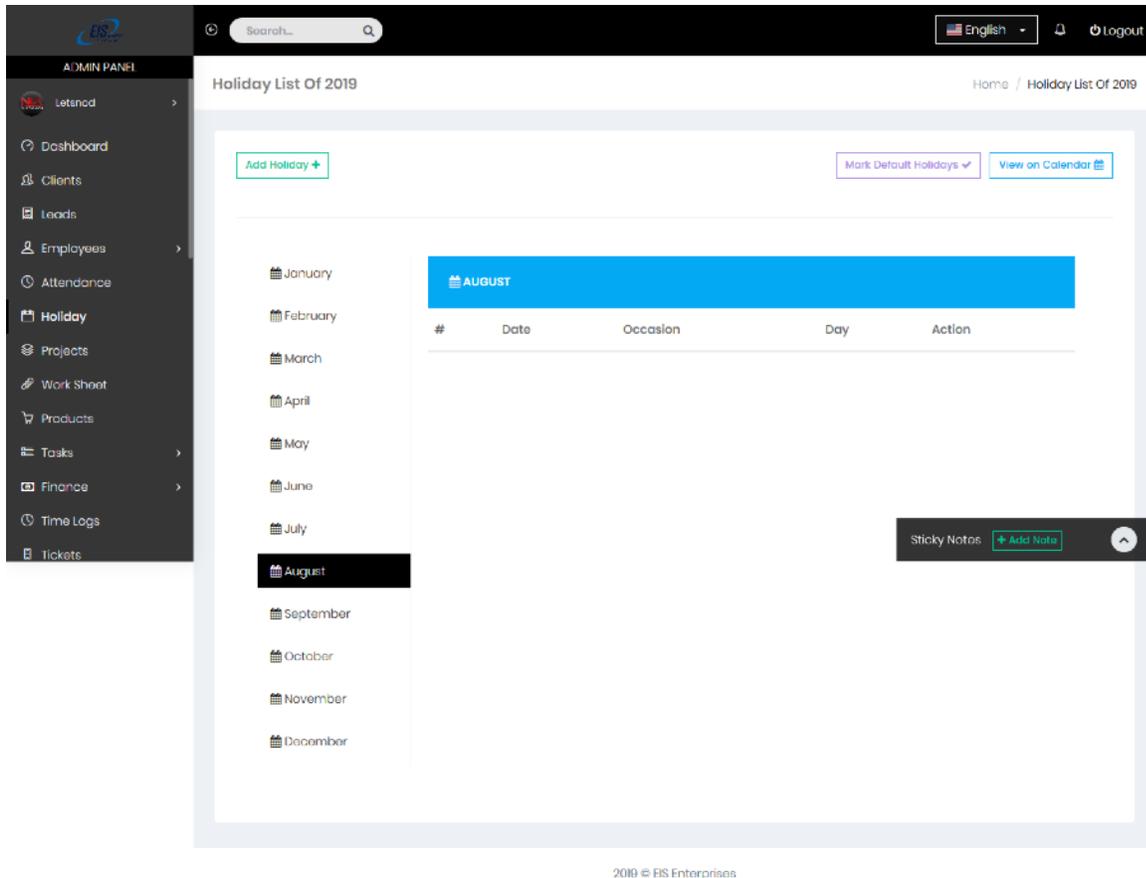
Screenshot showing 'Attendance by date' option

Holidays

Having a system that incorporates a working calendar is vital. The EIS app goes a step further by allowing the users to note their holidays in the calendar while also allowing them to add holidays.

To access the 'Holiday' panel a user will simply click on the 'Holiday' tab located on the Admin Panel. this action will prompt a screen similar to the one shown below.

Admin Panel>Holiday



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Screenshot showing a 'Holiday' panel

In the 'Holiday' panel a user can:

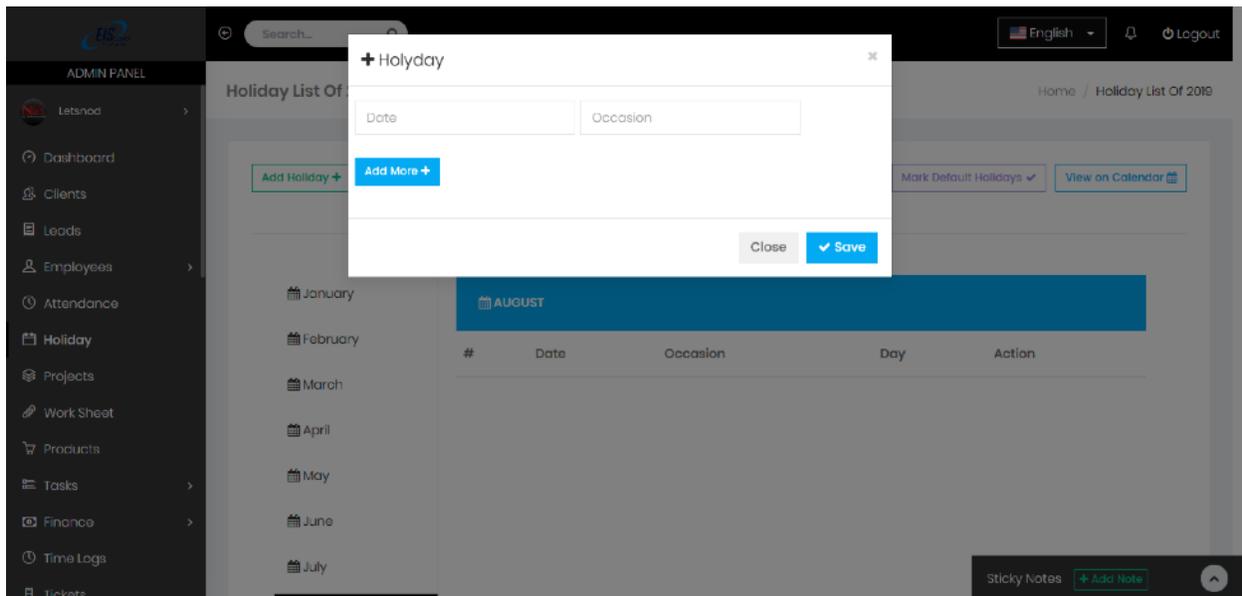
- Add a Holiday
- Mark out default Holidays
- View the calendar

Adding a Holiday

To add a holiday the user will simply click on the 'Add Holiday' tab which is located on the top left side of the panel.

A small panel similar to the one shown below will appear

Admin Panel>Holiday>Add Holiday



An 'Add Holiday' panel screenshot

This 'Add Holiday' small panel contains:

- A 'Date' tab- fill in the date you wish to set a holiday
- An 'Occasion' tab- fill in the occasion for the set holiday.
- The 'Add More' tab allows a user to add another date and occasion.
- 'Save' tab- Upon setting a specific holiday and occasion, effect the changes on the system by clicking on the 'Save' tab.
- 'Close' tab- this won't effect any changes but will automatically return a user to the 'Holidays' panel.

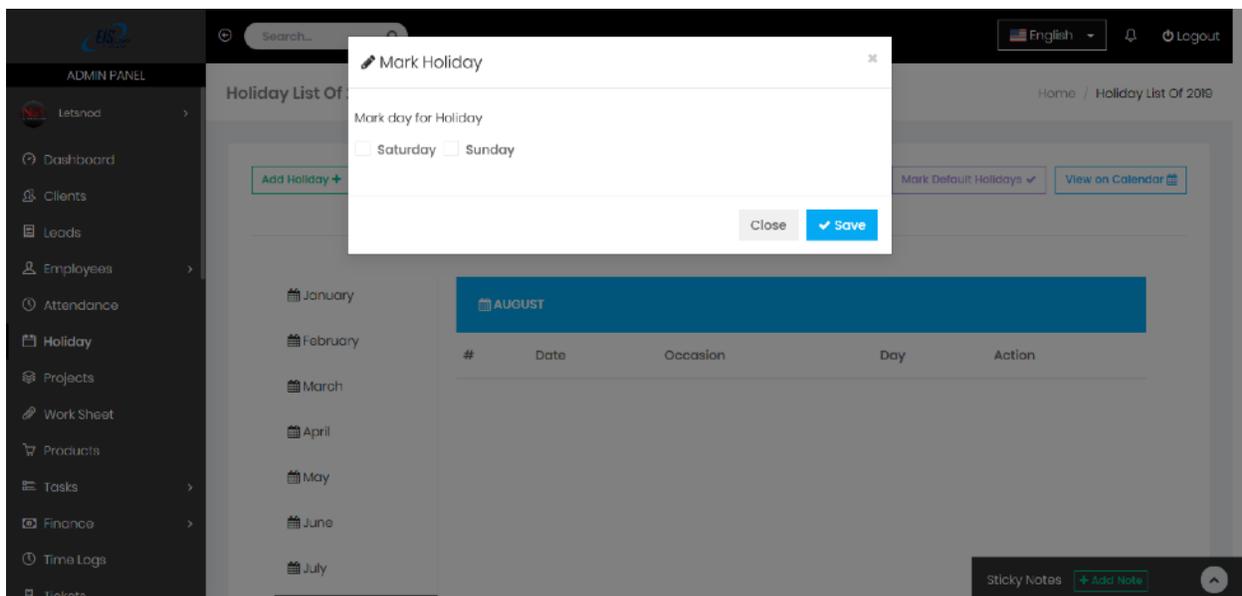
Marking Default Holidays

In many firms, Saturday and Sunday tend to be default holidays. However, different workplaces may have different working calendars. The EIS app allows users to set their default holidays in accordance with the set firm policies.

On the 'Holiday' panel click on the 'Mark Default Holidays' tab located on the top right side.

A small panel similar to the one shown below will appear

Admin Panel>Holiday>Mark a Default Holiday



Screenshot showing 'Mark default holiday' panel

Form here the user can simply mark the default holidays by simply ticking on the checkbox provided on the panel.

Clicking on the 'Save' tab will effect the changes done immeidately.

Clicking on the 'Close' tab will not effect any changes and will return user to the 'Holiday' panel.

View on calendar

This allows a user to have a simplified breakdown of the calendar. On this panel, the user gets a simplified calendar which can be schemed through easily. Also, a list of holidays and occasion set aside are presented in this panel.

To access this panel, simply click on the 'View on Calendar' tab located on the extreme right top of the 'Holidays' panel.

A screen similar to the one shown below should appear

Admin Panel>Holiday>View on Calendar

The screenshot displays the 'Holiday Calendar' interface. On the left is a dark sidebar menu with the 'ADMIN PANEL' header and various navigation options: Letsnod, Dashboard, Clients, Leads, Employees, Attendance, Holiday (selected), Projects, Work Sheet, Products, Tasks, Finance, Time Logs, and Tickets. The main content area is titled 'Holiday Calendar' and shows a calendar for 'AUGUST 2019'. The calendar grid has columns for SUN, MON, TUE, WED, THU, FRI, and SAT. The date 15th is highlighted in yellow. To the right of the calendar is a section titled 'AUGUST HOLIDAY' with a table with columns '#', 'Date', and 'Occasion'. At the bottom right, there is a 'Sticky Notes' section with an '+ Add Note' button and an upward arrow icon. The footer of the page reads '2019 © EIS Enterprises'.

'View on calendar' panel screenshot

Note- This is a panel for viewing the calendar and the set holidays, no changes can be effected on this panel.

Projects

With the EIS app projects, management just got interesting. Knowing the number of projects your firm is handling and their progress just got easier.

To access the projects panel, a user will locate and click on the 'Projects' tab located on the Admin Panel.

A screen similar to the one shown below should appear.

Admin Panel > Projects

The screenshot displays the 'Projects' section of the EIS Admin Panel. At the top, there's a search bar and language settings (English). The left sidebar lists various admin functions like Dashboard, Clients, Loads, Employees, Attendance, Holiday, Projects, Work Sheet, Products, Tasks, Finance, Time Logs, and Tickets. The main content area features four summary cards: 'TOTAL PROJECTS' (3), 'COMPLETED PROJECTS' (0), 'IN PROCESS PROJECTS' (3), and 'OVERDUE PROJECTS' (2). Below these are several action buttons: 'Add New Project', 'Add Project Category', 'Gantt Chart', 'Project Templates', 'View Archive', and 'Export To Excel'. There are also dropdown menus for 'Projects Status' and 'Client Name', both currently set to 'All'. A table lists the projects with columns for Id, Project Name, Project Members, Deadline, Client, Completion, and Action. The table shows three projects: 'Warehouse Project' (ID 12, deadline 10 Aug 2019, client Letsnod), 'Hardgrove Site Flooring' (ID 11, deadline 15 Oct 2019, client Letsnod), and 'Test project for test' (ID 10, deadline 15 Jun 2019, client Siaka). Each project row includes a progress bar (0%), a search icon, a refresh icon, a delete icon, and an 'Add Project Members' link. A 'Sticky Notes' popup is visible over the table. The footer shows 'Showing 1 to 3 of 3 entries' and navigation buttons for 'Previous', '1', and 'Next'.

2019 © EIS Enterprises

'Projects' panel screenshot

On this panel a user can:

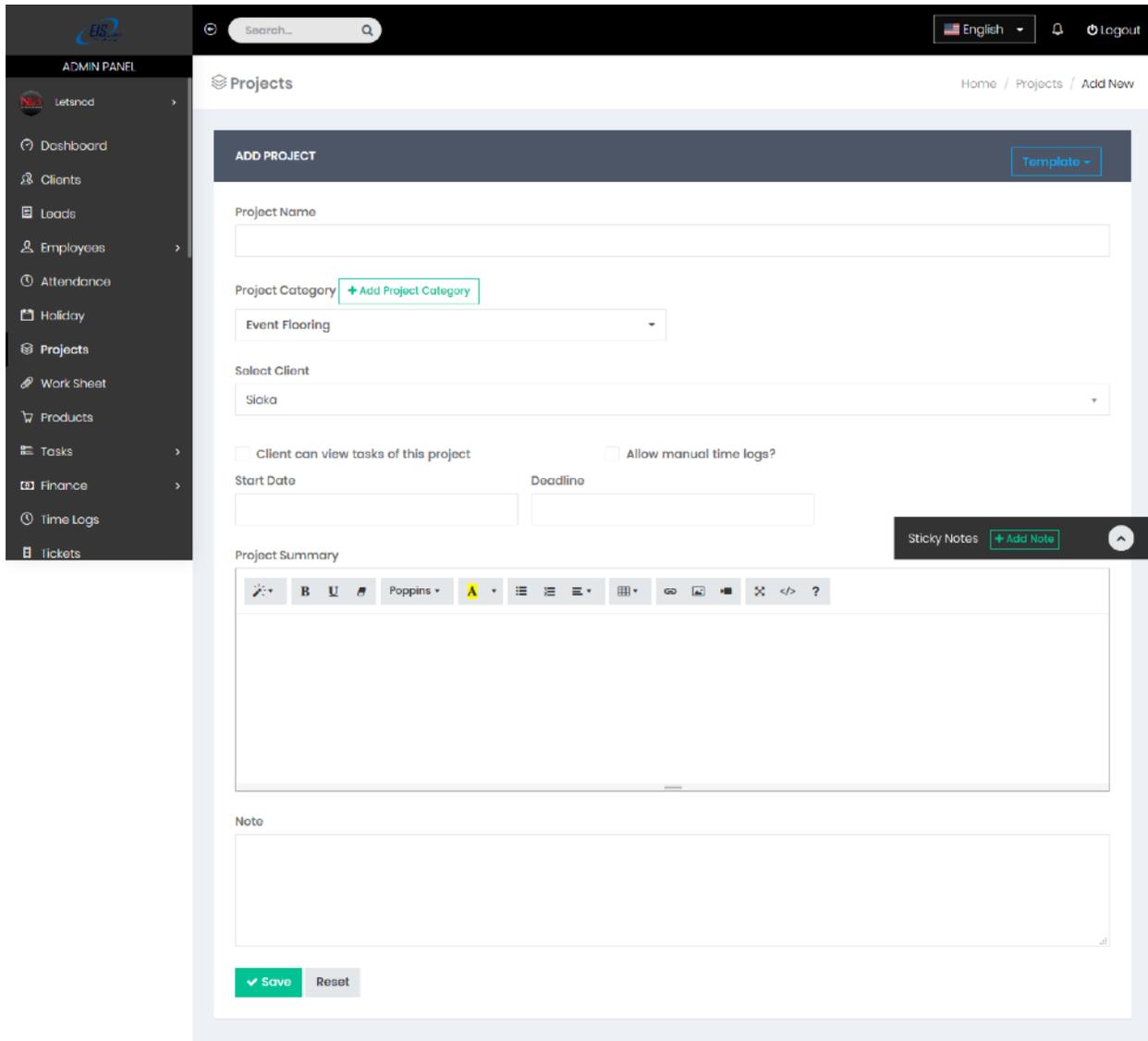
- View the project metrics- these metrics are represented in form of boxes at the top of the panel. They include total projects, completed projects, in process projects and overdue projects.
- Add a new project
- Add a project category
- View the Gantt chart
- Add some project template
- View archive

Adding a new project

Click on the 'Add new project' on the projects panel.

A panel where a user can add a new project will appear.

Admin Panel>Projects>Add New Project



2019 © EIS Enterprises

‘Add new project’ panel screenshot

The ‘Add New Project’ panel consists of these tabs:

Project name- Here the user will key in the correct name of the new project in the space provided.

Project category- This is where the user gets to add a new project into the system. To do this simply click on the ‘Add Project Category.

To select a project category, a user will simply click on the drop-down menu and select the preferred category.

To select a client, click on the drop-down arrow on the 'Select Client' section. This will generate a list of available clients suitable for the project.

On the client section, the user can allow the client to view the tasks of the project by ticking on the 'Client can view tasks of this project' tab.

This action will prompt a 'Send task notification to client' checkbox to appear. Marking on this checkbox will allow the system to send tasks notification to the client.

The user can also allow manual time logs by ticking on 'Allow Manual time logs' checkbox.

The user can indicate the start and deadline dates of the project by indicating them on the 'Start Date' tab and 'Deadline' tabs respectively.

Project Summary- in this section the user/admin can outline the details of the assigned project. This can be done with some precision and clarity for effective productivity on the client's part.

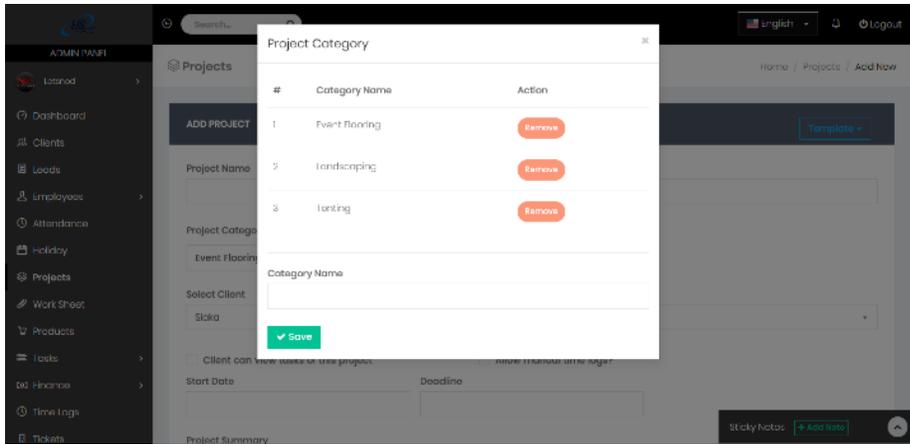
Note section- the user can opt to add some additional details of the assigned projects; these notes may not be present in the project summary.

User will click on the 'Save' tab to update the project

User will click on the 'Reset' tab to clear the project details.

Adding a new project category

Admin panel>Projects>Add project>Add project category



Screenshot showing 'Project category' panel

On this panel the user will write the name of the project on the 'Category name' tab located below the 'Project category' panel.

The 'Remove' tab located below the 'Action' section allows a user to delete some project category.

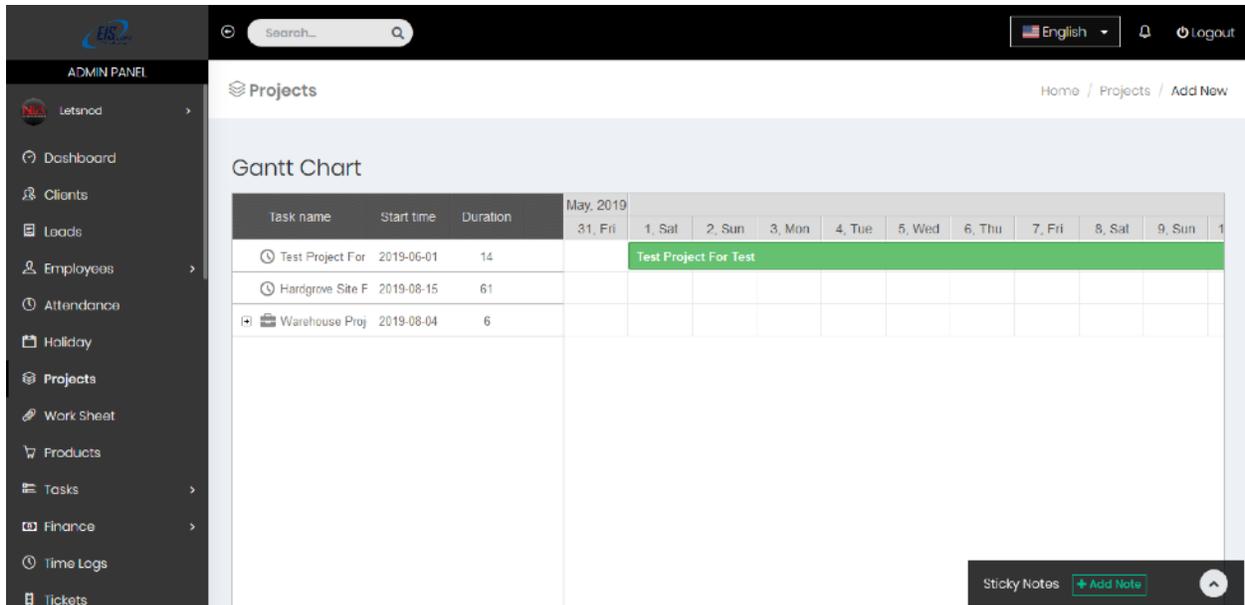
The user will update the category on the system by clicking on the 'Save' tab.

Gantt chart

A Gantt chart is a vital tool for the planning and scheduling of projects. They will help you assess how long a project will take while also help you plan the order in which you will complete the tasks.

To access the Gantt chart, a user will click on the 'Gantt chart' tab located on the Projects panel.

Admin Panel>Projects>Gantt chart



A 'Gantt chart' panel screenshot

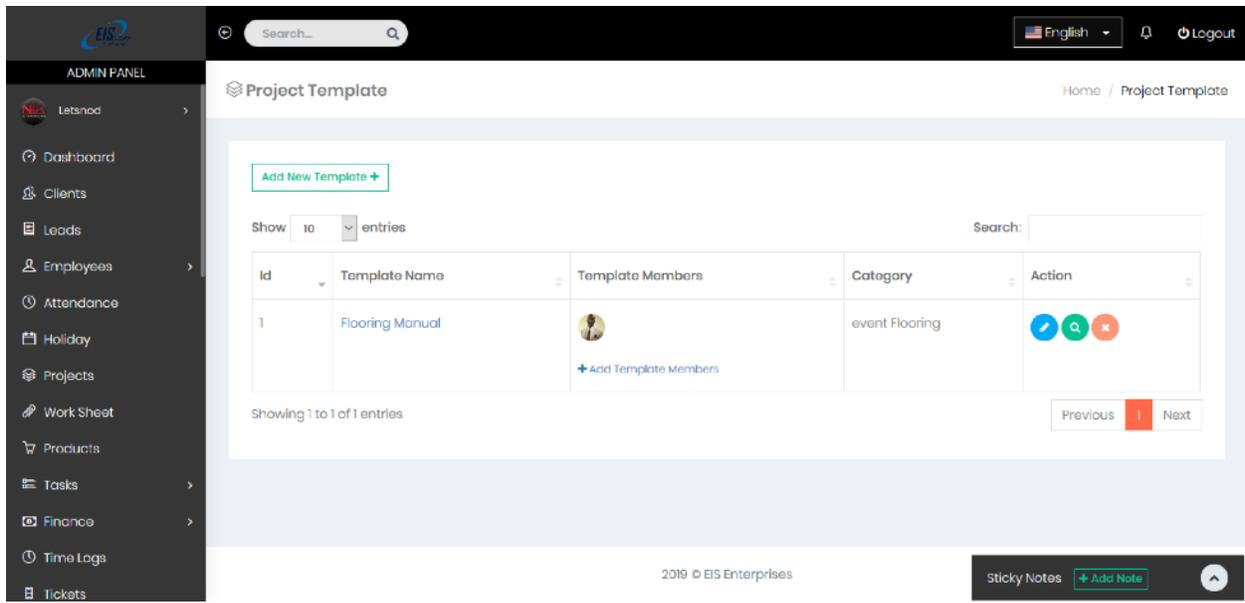
On the Gantt chart panel, the user can know the different tasks being handled, their start time and also the duration. Through the Gantt chart the user can get a detailed analysis of how the project is getting along and make the necessary changes if need be.

Project Template

With a reliable project template, you can get started with new projects swiftly and easily. The EIS app allows you to create stunning project templates thus helping your employees/staff accomplish the assigned projects without hitches.

To get started click on the 'Project Template' tab on the 'Projects' panel.

Admin Panel>Projects>Project Template



Screenshot showing a 'Project template' screenshot

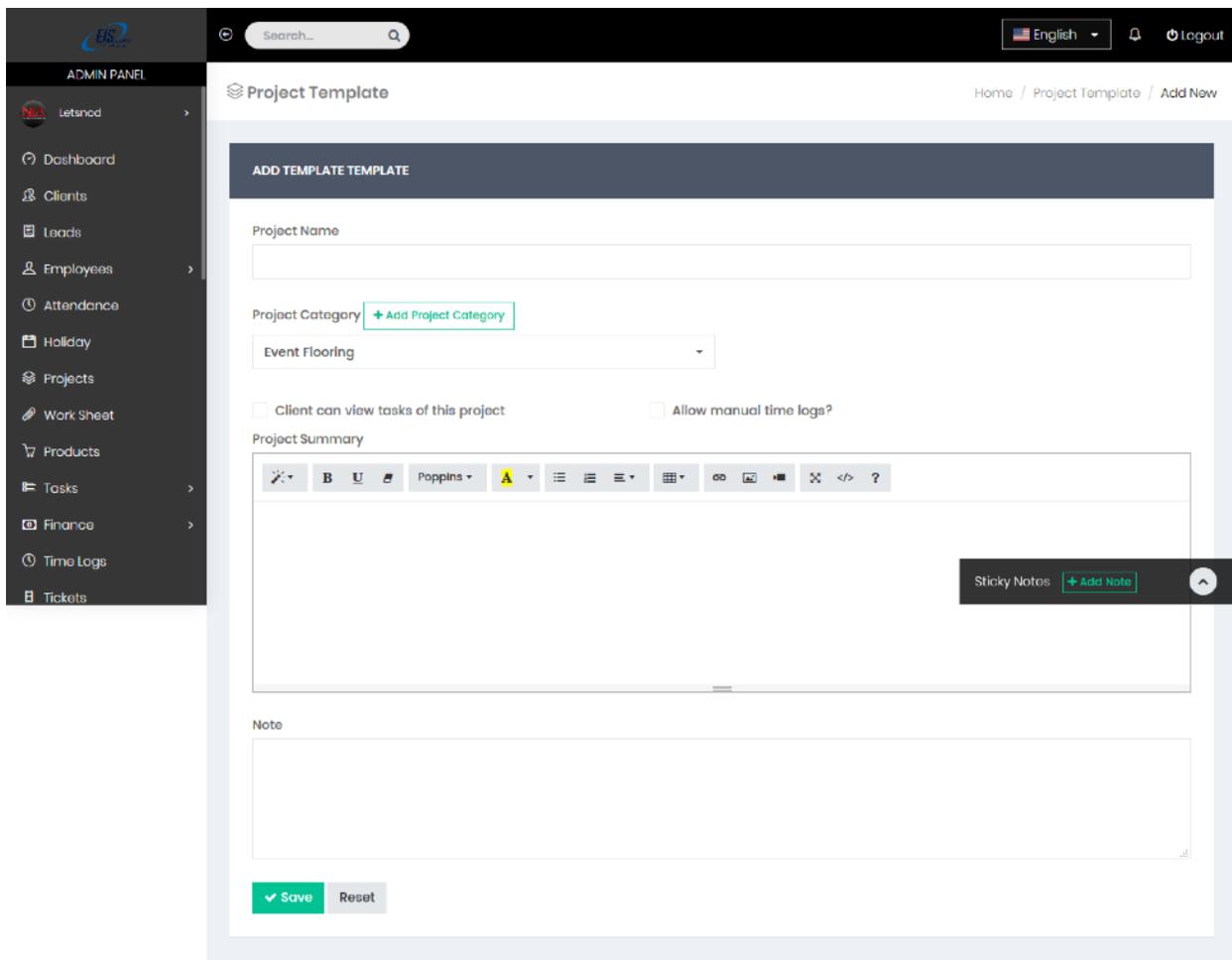
On the 'Project Template' panel a user can:

- Add a new template
- View the available project templates and their respective members

Adding a new template

To add a new template, a user will click on the 'Add New Template' tab located on the top left side of the 'Project Template' panel.

Admin Panel>Projects>Project Panel>Add New Template



Screenshot showing an 'Add new Template' panel

The 'Add Template' panel consists of the following sections:

- Project Name- the user keys in the correct name of the project
- Project Category- the user selects the correct project category from the drop down arrow.
- Project Summary- on this section the user/admin can outline the details of the assigned project.

The user can allow the client to view the tasks of the project by ticking on the 'Client can view tasks of this project'.

This action will prompt a 'Send task notification to client' checkbox to appear. Marking on this checkbox will allow the system to send tasks notification to the client.

The user can also allow manual time logs by ticking on 'Allow Manual time logs' check box.

Note section- An admin can opt to add some additional details of the assigned projects, these notes may not be present in the project summary.

User will click on the 'Save' tab to update the project

User will click on the 'Reset' tab to clear the project details.

View Archive

This tab allows the user to have a clear history of all the projects accomplished.

To access the archives a user will click on the 'View Archive' tab on the Projects panel.

Admin Panel>Projects>View Archive

The screenshot shows the 'View Archive' page for Projects in the EIS Admin Panel. The page features a search bar at the top, a sidebar with navigation options, and a main content area. The main content area includes a 'TOTAL ARCHIVED PROJECTS' section showing 0 projects, a filter section for 'All Projects', and a table with columns for Id, Project Name, Project Members, Deadline, Client, Completion, and Action. The table currently displays 'No data available in table'. A sticky notes section is visible at the bottom right with an 'Add Note' button.

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Screenshot showing 'View Archive' panel

The 'View Archive' panel consists of:

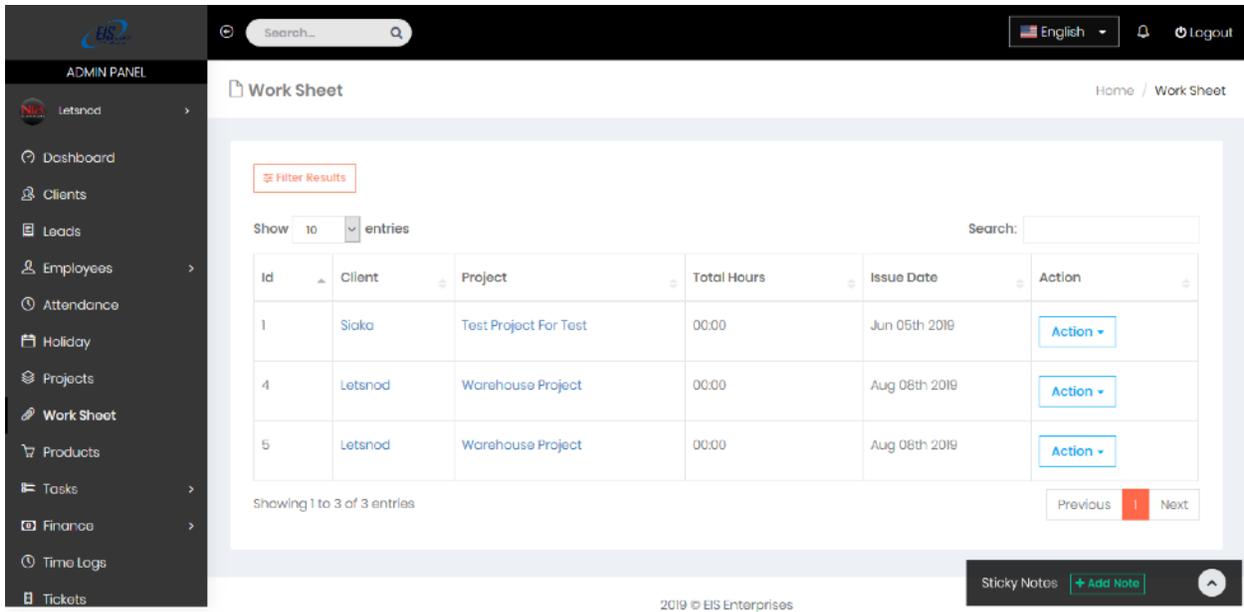
- Project Status- here the user can set the parameter of the projects s/he wants to view these parameters can include All, complete or incomplete. Click on the drop-down arrow to select a suitable parameter.
- Client name- with different clients having different projects, this tab helps the user to select a certain client with the intent of viewing the progress of his/her project.
- The entries section displays all the data including the ID, the project name, deadline, client, completion and action in accordance with the set preferences.

Work Sheet

In the EIS app, the worksheet section is the place where projects, clients assigned projects to work schedules and working times are viewed by the user/admin.

The worksheet can be accessed by simply clicking on the 'Worksheet' tab in the Admin Panel

Admin Panel>Worksheet

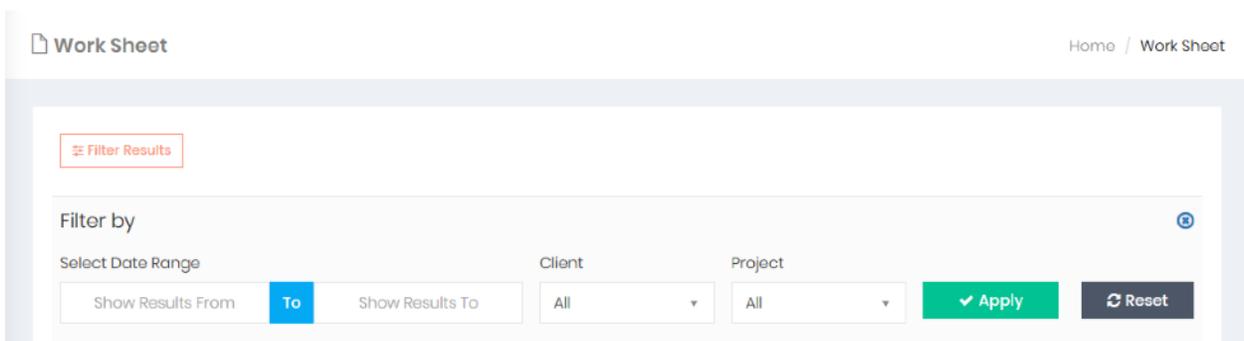


Screenshot showing a 'worksheet' panel

On the worksheet section, a user/admin can view all the details relating to a certain project.

For a more refined search, a user can click on the 'Filter Results' tab located on the top left side of the worksheet panel.

Admin Panel>Work sheet>Filter Results



Screenshot showing Filter parameters

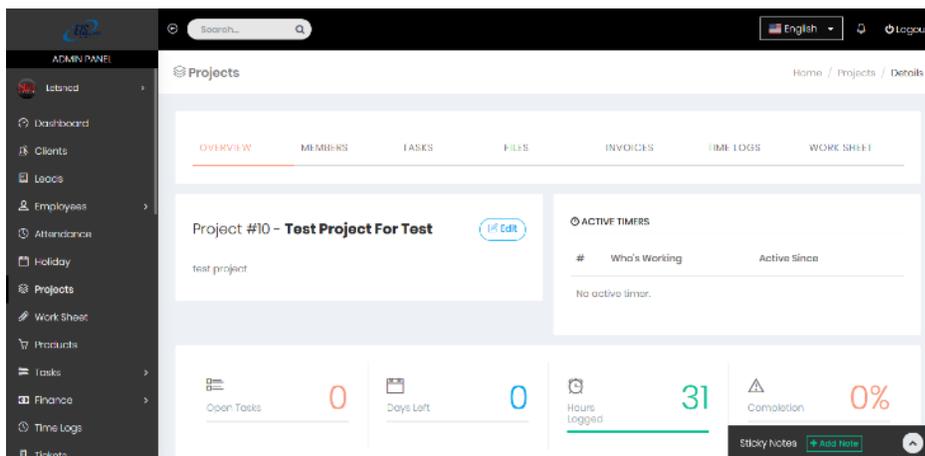
On the filter panel the user can filter the results by:

- Date Range- the user will key in the date ranges in the provided tabs. i.e. Show Results From and Show Results To.
- Client- using this parameter, the user can get the results of specific clients by clicking on the drop-down arrow and selecting a certain client.
- Project- using this parameter, the user can select a certain project and find out how it is fairing.

Upon setting the preferred filter parameters, the user will click on the ‘Apply’ tab. The results will be displayed in the results section.

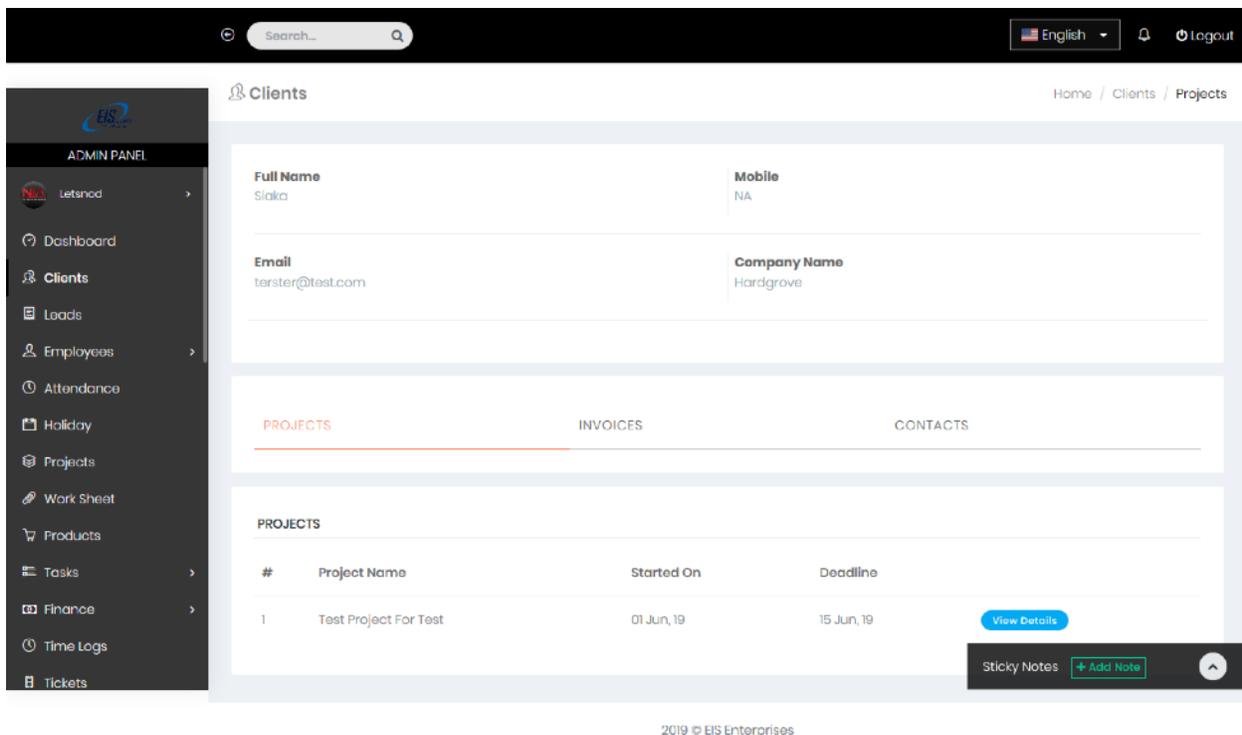
A user/admin can click on the client’s name or projects name on the results section for a better breakdown. This breakdown can include a client’s details, members handling the project, activity timeline, completion rate etc.

Admin Panel>Worksheet>Click on project name



To get a breakdown of the clients details, simply click on a client’s name on the results section.

Admin Panel>Worksheet>Click on client’s name



Screenshot showing a client's details

The 'Action' tab on the worksheet panel results sections can help a user carry out different actions including downloading, viewing or deleting a certain client/project worksheet.

Work Sheet

#1

Siaka

Hardgrove

EIS Enterprises

7612 Devilbiss Bridge Rd, Frederick, MD 21701

Date: 📅 05th Jun 2019

#	Employees	Details		Total Hours	Price
1	LAZARO DARIO VAIL ACABAL	Clock In	Clock Out	00:00	\$ 0.00
No attendance detail.					
2	LUIS RAMIREZ	Clock In	Clock Out	00:00	\$ 0.00
No attendance detail.					
3	JAVIER RUBIO	Clock In	Clock Out	00:00	\$ 0.00
No attendance detail.					

Total Hours : 00:00 Total Amount : \$ 0.00

Signature

A rectangular box containing a handwritten signature in black ink. The signature is stylized and appears to be a name with a flourish.

Generate PDF

Back

A downloaded worksheet screenshot

Products

The EIS app is a system that allows you to seamlessly track your inventory while also managing your products anytime and anywhere. With this system, you can now let go of the tedious cash sale and receipt system.

To access the Products panel, the user will click on the 'Products' tab on the Admin panel.

Admin panel >Products

The screenshot displays the EIS Admin Panel interface. On the left is a dark sidebar with the 'ADMIN PANEL' header and a list of navigation items: Letsnod, Dashboard, Clients, Leads, Employees, Attendance, Holiday, Projects, Work Sheet, Products (highlighted), Tasks, Finance, Time Logs, and Tickets. The top navigation bar includes a search field, a language dropdown set to 'English', a notification bell, and a 'Logout' button. The main content area is titled 'Products' and features a breadcrumb 'Home / Products'. A dark blue metric box at the top left shows 'TOTAL PRODUCTS' with a shopping cart icon and the number '1'. Below this is a green 'Add New Products +' button and a blue 'Export To Excel' button. A search bar is positioned above a table. The table has columns for 'Id', 'Name', 'Price (inclusive All Taxes)', and 'Action'. One row is visible with 'Id' 1, 'Name' 'White Translucent 4x4' HDPE Laydown Flooring', and 'Price' 13375. The 'Action' column contains a blue edit icon and a red delete icon. Below the table, it says 'Showing 1 to 1 of 1 entries' and includes 'Previous' and 'Next' navigation buttons. At the bottom right, there is a 'Sticky Notes' section with an 'Add Note' button.

'Products' panel screenshot

On the Products panel the user can:

- Know the total products- this is depicted by the metric box labelled 'Total products' on the top left side of the panel.
- Know the product name and price-this is depicted in the results section. In this section also under the 'Action' column the user can either edit or delete the details of a certain product.

Adding a new product

In order to add a new product the user will click on the 'Add new product' tab in the Products panel.

Admin Panel>Products>Add new product

The screenshot shows the 'Add new product' panel in the Admin Panel. The panel is titled 'ADD PRODUCTS' and contains a 'PRODUCTS DETAILS' section. It features two input fields: 'Name' and 'Price'. Below the 'Price' field is a note: 'Insert price without currency code.' There is also a 'Tax' section with a dropdown menu labeled 'Select Tax'. At the bottom of the form are two buttons: 'Save' (with a checkmark icon) and 'Reset'. The interface includes a dark sidebar on the left with various menu items, a search bar at the top, and a footer with '2019 © EIS Enterprises' and a 'Sticky Notes' section with an 'Add Note' button.

Screenshot showing 'Add new product' panel

In the 'Add new product' panel the user will:

Indicate the name of the new product on the blank name tab

Fill in the price in the blank price tab

Select a tax preference on the 'Tax' tab, click on the drop-down arrow and select the correct tax.

Effect the changes by clicking on the 'Save' tab.

The 'Reset' tab can be used to clear all the data in this panel.

Tasks

With this section, the user/admin can effectively manage the different tasks within the firm without straining to know who is doing what and when a certain task is to be finished.

To access this click on the 'Tasks' tab in the Admin panel

A drop-down menu with options including Tasks, Task Board and Task Calendar will appear.

Click on the first option, i.e. Tasks option.

Admin Panel>Tasks>Tasks

The screenshot displays the 'Tasks' page in the EIS Admin Panel. The sidebar on the left contains the following menu items: Dashboard, Clients, Leads, Employees, Attendance, Holiday, Projects, Work Sheet, Products, Tasks (selected), Task Board, and Task Calendar. The main content area features a search bar at the top right with 'English' and 'Logout' options. Below the search bar, the 'Tasks' section includes a 'Filter Results' area with 'SELECT DATE RANGE' (2019-08-01 to 2019-08-31) and 'SELECT PROJECT' (Select Project) dropdowns, along with a 'Hide Completed Tasks' checkbox and an 'Apply' button. The 'Tasks' section also has buttons for 'New Task +', 'Task Board', 'Add Task Category +', and 'Export To Excel'. A table below shows the task list with columns for Id, Project, Title, Assigned To, Due Date, and actions. The table contains three entries, all assigned to 'Test' and marked as 'Incomplete'. The bottom of the page shows 'Showing 1 to 3 of 3 entries' and navigation buttons for 'Previous', '1', and 'Next'.

Id	Project	Title	Assigned To	Due Date	Actions
3	Warehouse Project	Logg	Test	21 Aug, 19	Incomplete, Edit, Delete
2	Warehouse Project	Tetsteer	Test	18 Aug, 19	Incomplete, Edit, Delete
1	Warehouse Project	Test	Test	14 Aug, 19	Incomplete, Edit, Delete

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Screenshot showing a 'Tasks' panel

The tasks panel is divided into two sections. These include the Filter Result section and the tasks section.

On the Filter Results section, a user can perform a refined search of the tasks assigned by either keying in a date range or selecting a specific project.

By ticking the 'Hide Completed Tasks' checkbox, the results displayed will be limited to incomplete tasks only.

Click on the 'Apply' tab located on the Filter section to start your search.

The results will be displayed in the results section.

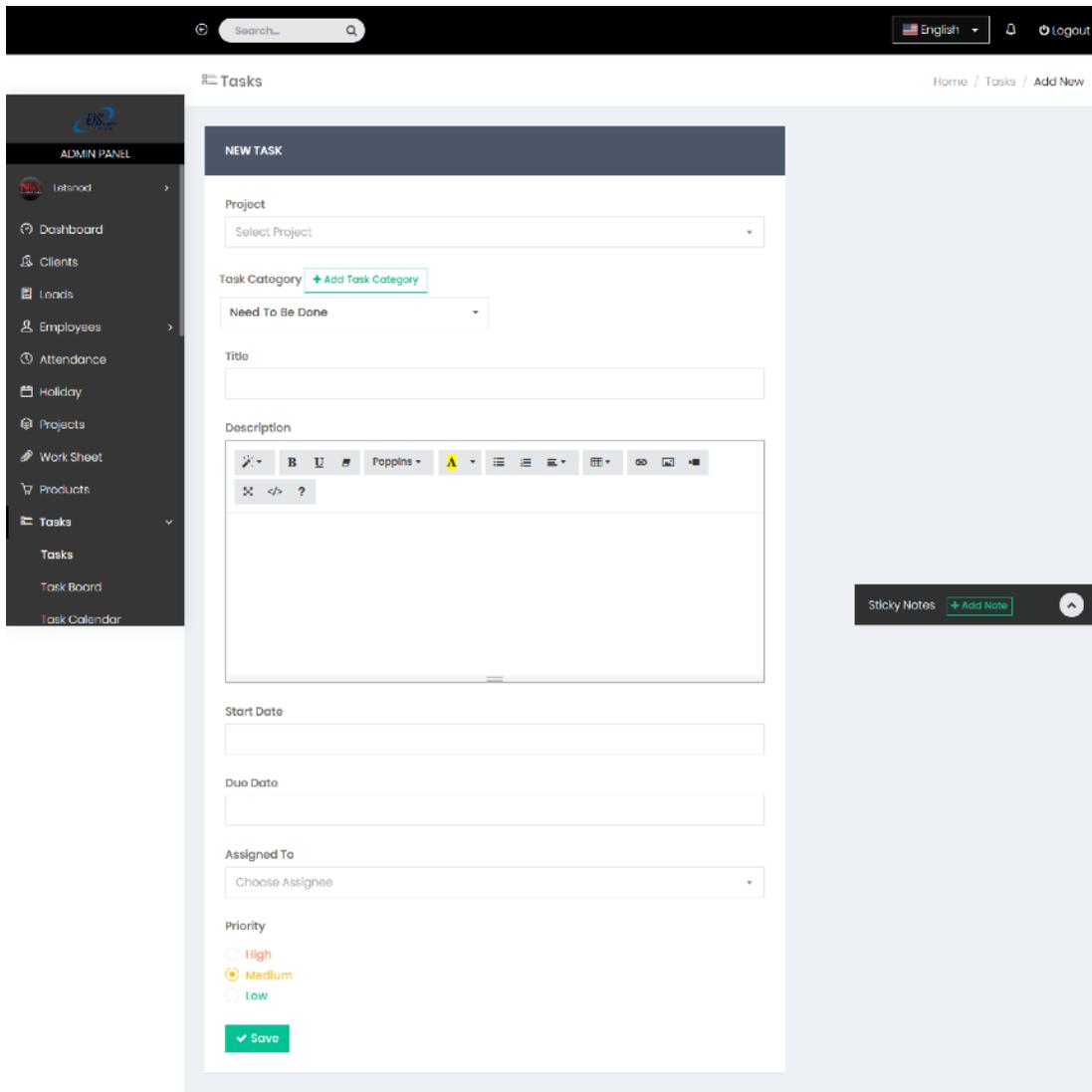
On the tasks section a user can:

- Add a new task
- View the task board
- Add a task category

Adding a new task

To add a new task, simply click on the 'New Task' tab located in the tasks section.

Admin panel>Tasks>tasks>New Task



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Screenshot showing a ‘New tasks’ panel

In the ‘New Task’ panel a user will:

Select a project- a user will click on the drop-down arrow and select a suitable project.

Select a task category- on the ‘Task Category’ tab a user will click on the drop-down arrow and select a suitable category.

On the ‘Title’ tab the user will assign a title to the task

The user can go ahead and write a brief description of the task to be carried out, this will be done on the space provided under the 'Description' tab.

Both the Start Date and the Due date can be filled in the tabs provided.

The 'Assigned To' tab allows a user to choose an assignee. A user can select an assignee by clicking on the drop-down arrow.

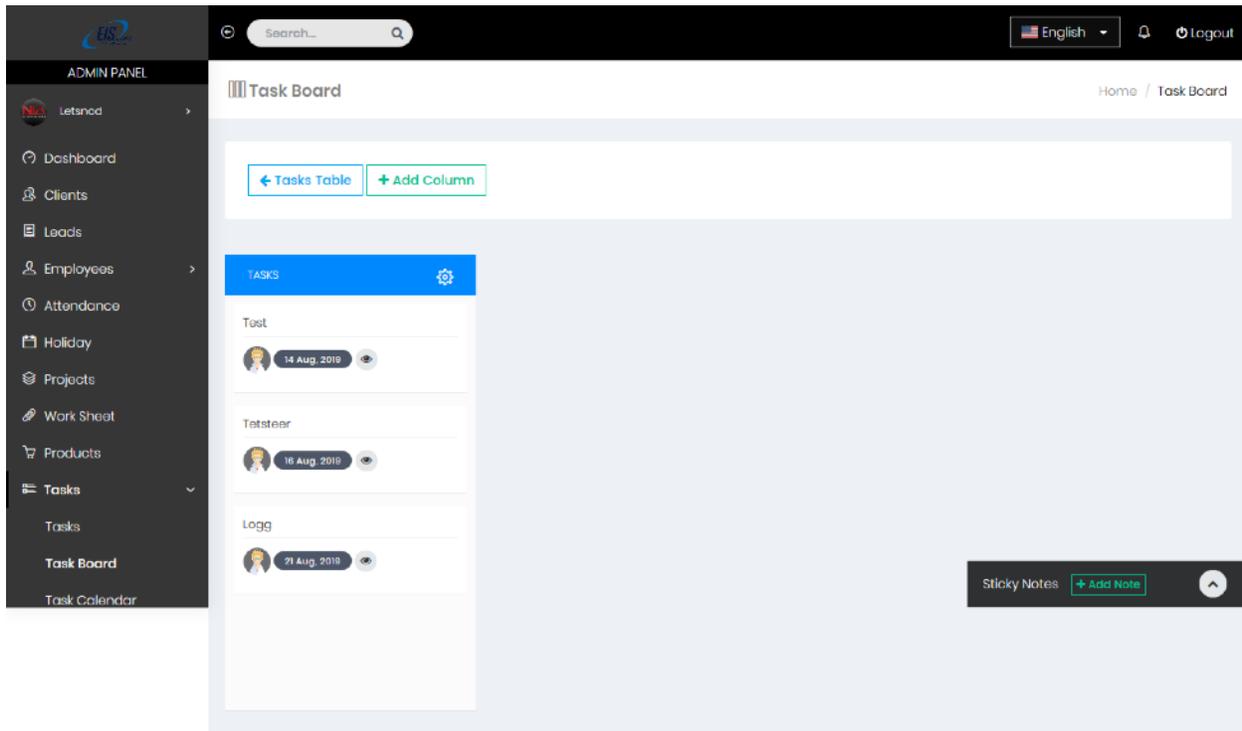
The 'Priority' tab allows a user to select either High, medium or low this may depend on the level of urgency or competency of the task at hand.

To successfully add a task to the system a user must click on the 'Save' tab located below the 'New Task' panel.

Task Board

To access this panel Click on the Task Board tab on the Admin panel

Admin Panel>Tasks>Task Board



Screenshot showing the 'Task Board' panel

The Task board panel consists of:

1. The Tasks Table section

Clicking on this tab returns a user to the 'Tasks' panel.

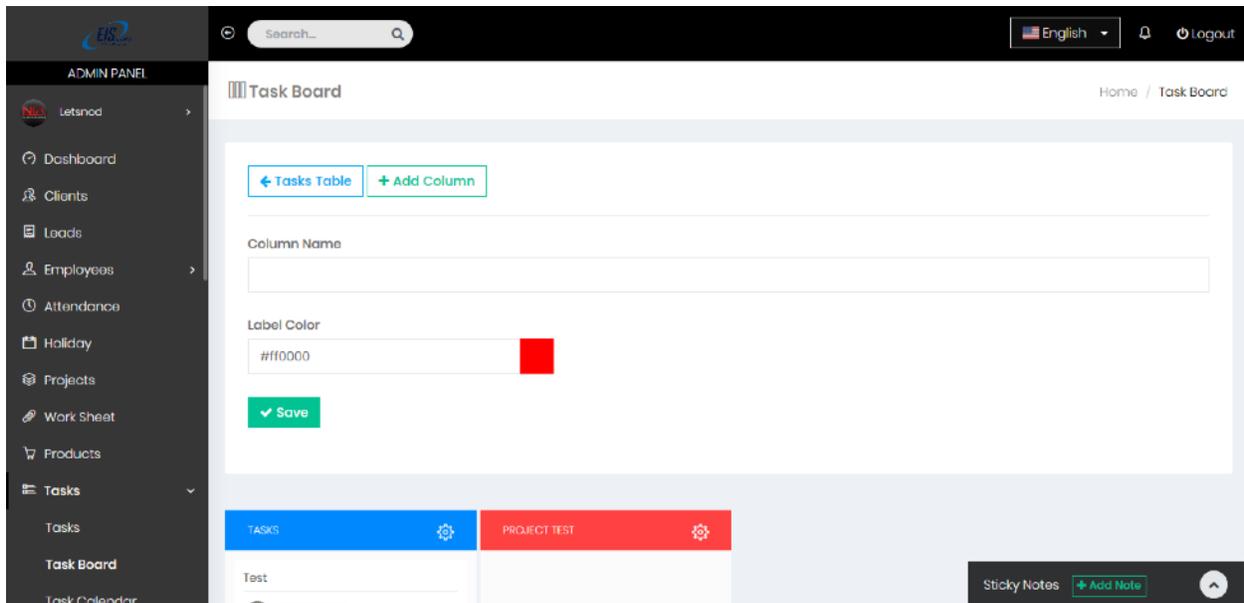
In this panel, the user can view the details of the tasks assigned. A user can click on the 'eye' icon located in the Task column. This will bring a comprehensive breakdown of the task details.

2. Adding a column section

An astounding trait of the Task Board panel is that it allows the user to add a new column.

A user will click on the 'Add column' tab

Admin panel > Tasks > Task Board > Add column



Screenshot showing 'Add column' section

The user will assign a suitable name for the column to be added. This is done in the 'Column Name' tab.

The user can select a suitable color for the new column. This is done by selecting a color in the 'Label Color' tab.

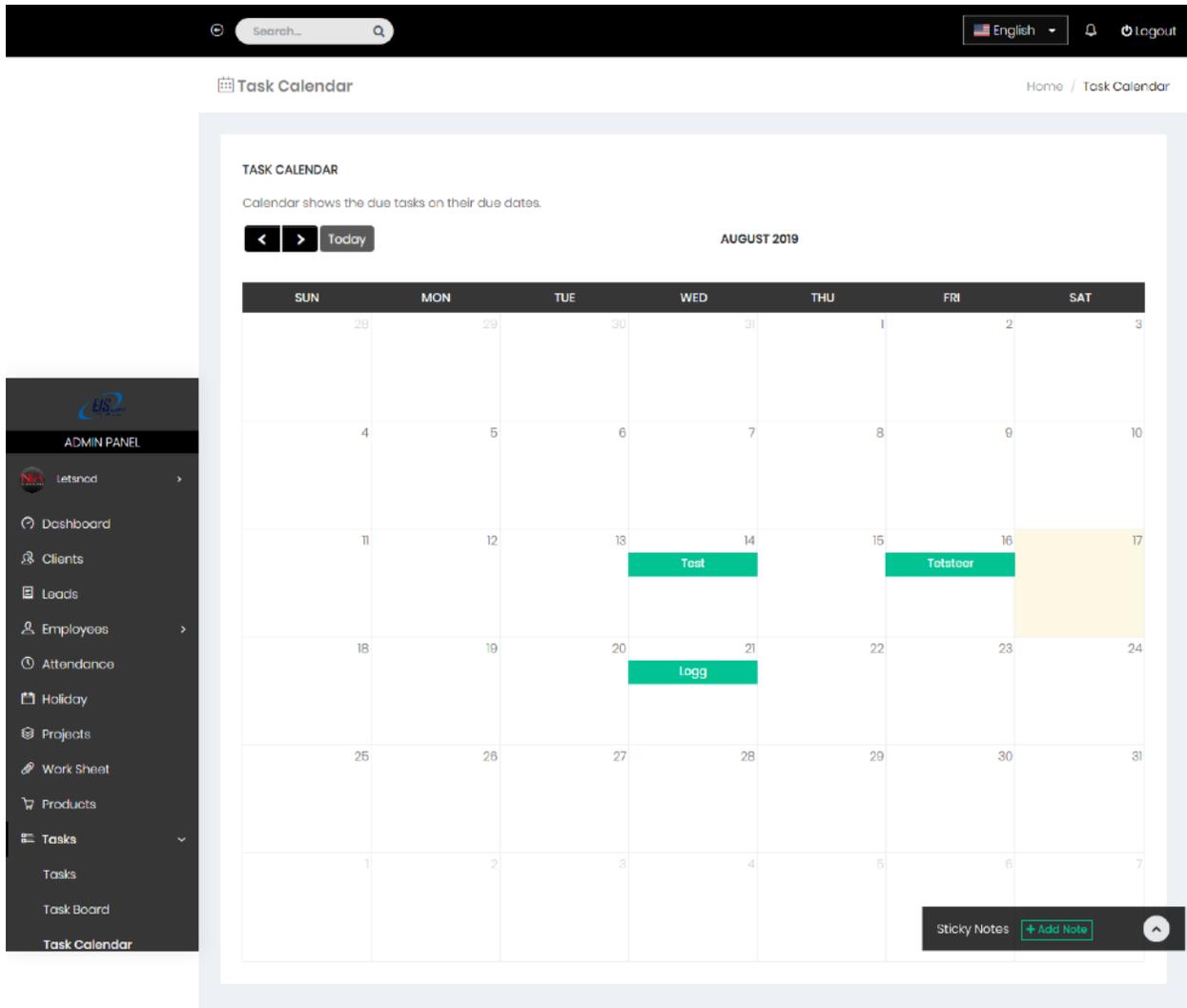
Finally, the user will click on the 'Save' tab, a new column with a name and the selected color will appear.

Task Calendar

The task calendar aids a user in knowing when an assigned task is due.

To access this panel, click on the 'Task Calendar' tab on the Admin Panel-Tasks section.

Admin>Tasks>Task Calendar



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‘Screenshot showing ‘Task Calendar’ panel

To get more details of a certain task, a user will simply scheme to the date and simply click on the task. This will present the complete task details.

Finance

The EIS app is an effective all in one resource for managing your finances, tracking your spending and getting smart all about money.

Click on the ‘Finance’ tab located on the Admin panel.

From the drop-down arrow, the user can either choose the 'Estimates' option or the 'Invoices' option.

The Estimates option allows a user to:

- Create Estimates
- Add an item

Estimates

Creating an Estimate

Admin Panel>Finance>Estimates

The screenshot shows the 'CREATE ESTIMATE' form in the EIS Admin Panel. The form is titled 'CREATE ESTIMATE' and is located in the 'Estimates' section of the 'Finance' menu. The form includes the following fields and sections:

- Client:** A dropdown menu with 'Siaka' selected.
- Currency:** A dropdown menu with '\$ (USD)' selected.
- Valid Till:** A date field with '09/15/2019' entered.
- Item Table:** A table with columns for 'Item', 'Type', 'Qty/Hrs', 'Unit Price', and 'Amount'. The table contains one row with 'Item' in the 'Type' column, '0' in 'Qty/Hrs', '0' in 'Unit Price', and '0.00' in 'Amount'. There is a red 'x' icon to the right of the row.
- + Add Item:** A blue button to add a new item to the table.
- Summary:** A section showing 'Sub Total 0.00', 'Discount 0.00', 'Tax 0.00', and 'Total 0.00'.
- Note:** A large text area for adding a note to the estimate.
- Sticky Notes:** A section with a '+ Add Note' button and an upward arrow icon.
- Save:** A green button with a checkmark icon to save the estimate.

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Screenshot showing 'Estimates' panel

When creating an estimate a client will fill in the client's name on the 'Client' tab, fill in the currency in the 'Currency' tab and also fill in the valid date in the 'Valid Till' tab.

The user will also fill in the name of the item in the 'Item' tab and the type of item in the 'Type' tab. Also the unit price; Quantity/hours and the Amount will be filled in the provided tabs.

The user can also add some few details about the product/item in the 'Note' section.

To add an item a user will click on the 'Add item' tab. This will direct you to a new panel where the user can register the details of the new item.

To ensure that the estimate is successfully created in the system a user will click on the 'Save' tab.

Invoices

Still under the 'Finance' section, the 'Invoice' subsection allows a user to either add an invoice or view the available firm's invoices.

Admin panel>Finance>Invoices

The screenshot displays the 'Invoices' section of the EIS Admin Panel. The interface includes a search bar at the top, a language dropdown set to 'English', and a 'Logout' button. The left sidebar shows the 'ADMIN PANEL' with various navigation options, and 'Finance' is currently selected. The main content area shows a table of invoices with the following data:

Id	Invoice #	Project	Client	Total	Invoice Date	Status	Action
5	INV#5	Test project for test	Siaka	\$200 (USD)	Aug 07th 2019	UNPAID	Action
4	INV#4	Hardgrove Site Flooring	Letsnod	\$12708.25 (USD)	Aug 07th 2019	UNPAID	Action
3	INV#3	Warehouse Project	Letsnod	\$10825 (USD)	Aug 07th 2019	UNPAID	Action
2	INV#2	Test project for test	Siaka	\$101 (USD)	Jul 02nd 2019	UNPAID	Action
1	INV#1	Test project for test	Siaka	\$1549.8 (USD)	Jul 02nd 2019	UNPAID	Action

At the bottom of the page, there is a footer that reads '2019 © EIS Enterprises'.

Screenshot showing the invoices panel

Adding an invoice

To add an invoice, the user will click on the 'Add invoice' tab located on the top left side of the 'Invoices' panel. This should prompt a tab similar to the one shown below to appear.

Admin panel>Invoices>Add invoice

O n

t h i s

The screenshot displays the 'ADD INVOICE' form within the EIS Admin Panel. The interface includes a top navigation bar with a search bar, language selection (English), and a logout option. The left sidebar shows the 'ADMIN PANEL' with various menu items, including 'Invoices'. The main content area is titled 'Invoices' and contains the 'ADD INVOICE' form. The form fields are as follows:

Invoice #	Project	Currency
INV#6	Test Project For Test	S (USD)

Invoice Date: 08/10/2019
Due Date: 09/03/2019

Is it a recurring payments? No

Products dropdown is active.

Item	Qty/Hrs	Unit Price	Tax	Amount
	1	0	--	

Sub Total: 0.00
Discount: 0 %
Tax: 0.00
Total: 0.00

Note: [Text area]

Save button is present at the bottom left.

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Screenshot showing an 'Add Invoice' panel

The 'Add invoice' panel consists of:

Invoice #(number)- this tab depicts the number of the invoice to be added.

Project- in this tab the user gets to select the type of project to be covered by the invoice. To do this the user will simply click on the drop down arrow and select the project.

Currency- on this tab the user gets to select the type of current to be used on the invoice; this is done by clicking on the drop down arrow and selecting the suitable currency.

Invoice date- this tab depicts the date when the invoice is created.

Due date-this tab depicts the date which the project is to be completed thus allowing the maturity of the invoice.

'Is it a recurring payment' tab- this tab allows the user to select a 'Yes' or 'No' option in relation to the recurrent payment nature of the invoice.

The 'Products' section still in the 'Invoice' panel allows the user to define the details of the products. These details include the name of the item, the quantity/Hours, the unit price and the tax involved.

In case the invoice contains more than one product, the user can simply click on the 'Add item' tab located on the 'Products' section. With this a user can add the details of the new item/product.

The user can also add more details about the invoice, project or product on the 'Notes' section.

The user will click on the 'Save' tab located on the bottom left side of the panel to successfully update the invoice on the system.

Payments

In the EIS app the payments section allows a user to know what project is being paid for, the amount to be paid, the status of the project and the date when the project is processed.

To access this section the user will click on the 'payment' tab located under the 'Finance' section.

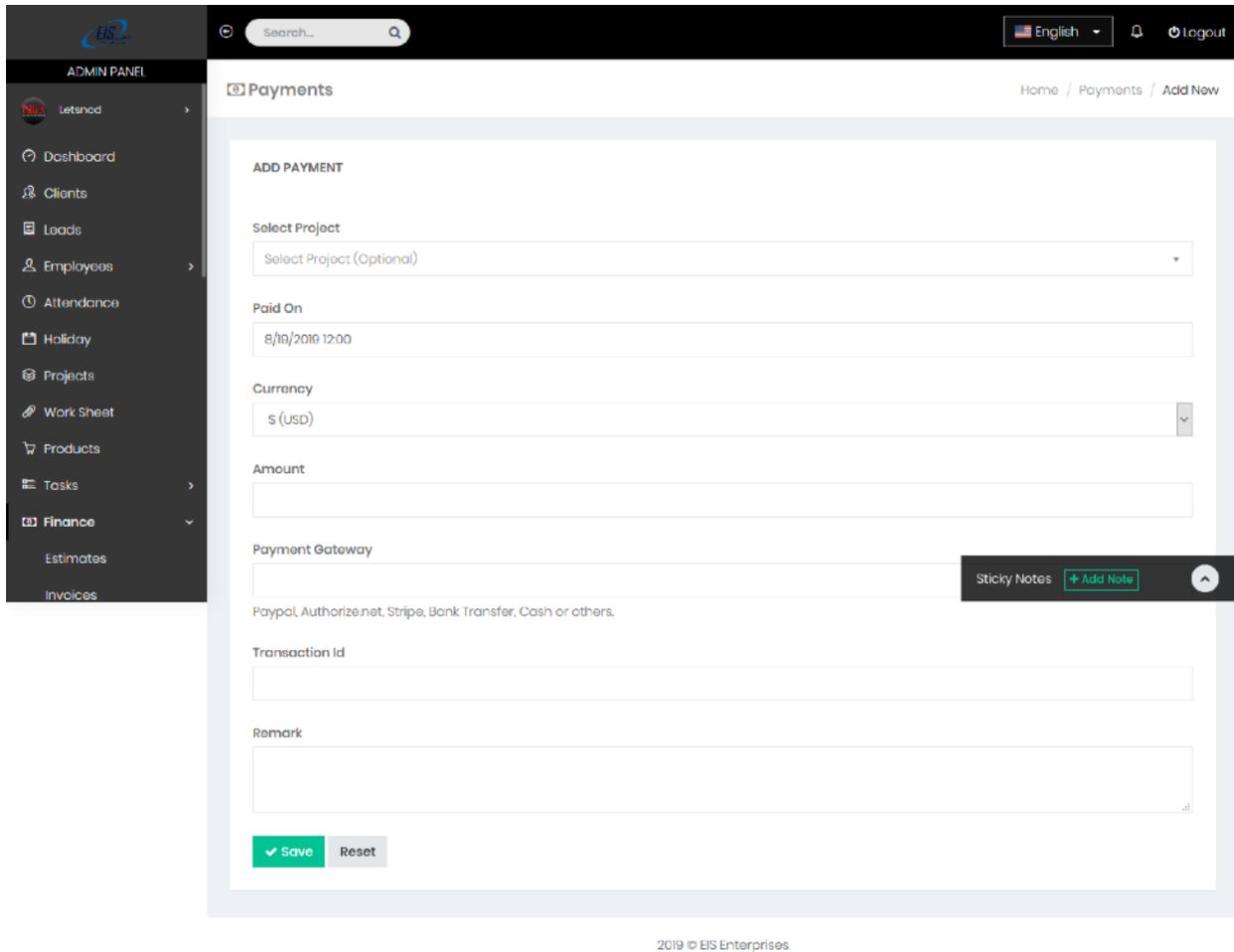
Admin Panel>Finance>Payments

The screenshot displays the 'Payments' section of an admin panel. On the left is a dark sidebar with a navigation menu including 'Dashboard', 'Clients', 'Leads', 'Employees', 'Attendance', 'Holiday', 'Projects', 'Work Sheet', 'Products', 'Tasks', 'Finance', 'Estimates', and 'Invoices'. The main content area has a header with 'Payments' and a breadcrumb 'Home / Payments'. Below the header are buttons for 'Add Payment +', 'Filter Results', and 'Export To Excel'. A search bar and 'Import CSV' button are also present. A table lists payment entries with columns for Id, Project, Amount, Paid On, Status, Remark, and Action. One entry is shown: Id 1, Project Hardgrove Site Flooring, Amount \$10000.00 (USD), Paid On 08 Aug 2019 08:00, Status COMPLETE, Remark Partial Payment. Below the table is a pagination control showing 'Showing 1 to 1 of 1 entries' and 'Previous', 'Next' buttons. At the bottom right, there is a 'Sticky Notes' section with an 'Add Note' button. The footer contains '2019 © EIS Enterprises'.

Screenshot showing the payments panel

Adding a payment

To add a payment, the user will click on the 'Add payment' tab located on the left side of the 'Payments' panel.



Screenshot showing 'Add Payment' panel.

The 'Add payment' panel contains:

'Select project' tab- here the user gets to select the type of project being paid for, this is done by clicking on the drop down arrow. However, filling this tab is optional.

'Paid on' tab- this is the tab where the user gets to fill in the specific date of the payment.

'Currency' tab- this tab allows the user to select the type of current on the payment.

'Amount' tab- this is where the user fills in the amount to be paid in figures.

'Payment Gateway' tab- this is where the user gets to fill in the medium to be used in the payment. Some of the mediums can include Paypal, Stripe, Bank Transfer etc.

'Transaction Id' tab- this is where the user gets to fill in the transaction number

‘Remark’ tab- this is where the user gets to fill in some details or remarks in relation to the payment being made.

The ‘Save’ tab located on the bottom of the panel allows a user to successfully add a payment into the system.

With the ‘Reset’ tab located on the bottom left of the panel a user can delete/reset all the information in this panel.

Expenses

The ‘Expenses’ tab is located under the ‘Finance’ section on the Admin Panel.

Admin Panel>Finance>Expenses

The screenshot displays the 'Expenses' panel in the Admin Panel. The panel features a search bar at the top, a language dropdown set to 'English', and a 'Logout' button. The main content area shows a table of expenses with the following data:

Id	Item Name	Price	Employees	Purchase Date	Status	Action
3	Quantico Military Base	\$55	DEON M. AMBUSH	07 Aug, 2019	APPROVED	Edit Delete
2	Fuel	\$38	Juan Guevara	09 Jul, 2019	APPROVED	Edit Delete
1	gas for the truck	\$18	Letsnod	30 Jun, 2019	APPROVED	Edit Delete

Below the table, it indicates 'Showing 1 to 3 of 3 entries'. At the bottom right, there are navigation buttons for 'Previous', '1', and 'Next', along with a 'Sticky Notes' section containing an 'Add Note' button.

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Screenshot showing ‘Expenses’ panel

In the ‘Expenses’ panel the user can:

Add Expense- here the user can add a new expense into the system.

Filter Results- here the user can view the different expenses. For more refined results the user will click on the 'Filter Results' tab. From here the user can select the different filter parameters including the date range, employee and status. To search, the user can click on the 'Apply' tab thus displaying the results.

Adding an expense

To add an expense the user will click on the 'Add expense' tab located on the top right side on the 'Expenses' panel.

Admin panel>Finance>Expenses>Add Expense

The screenshot shows the 'Add Expense' form in the EIS Admin Panel. The form is organized into several sections:

- Choose Member:** A dropdown menu with 'Letsnod' selected.
- Card Information:** Three input fields for 'No. EIS Credit, Member or Gas Card', 'No. Personal Card used', and 'Cash Provided by EIS'.
- Job and Description:** 'Job name, site or Company*' (input), 'Expense type' (dropdown menu with 'Fuel' selected), and 'Description' (input).
- Time and Location:** 'Auth # or Approval #' (input), 'Time of Expense' (input with '05:15 PM' selected), and 'Odometer' (input).
- Date and Vehicle:** 'Date of Expense*' (input with '08/10/2019' selected), 'Truck or Van Number' (input), and 'Tag #' (input).
- Merchant and Price:** 'Merchant Name' (input), 'Location' (input), and 'Price*' (input).
- Invoice:** An input field with a 'Select File' button.

At the bottom of the form are two buttons: a green 'Save' button and a grey 'Reset' button. A 'Sticky Notes' widget with an 'Add Note' button is positioned on the right side of the form.

Screenshot showing 'Add Expense' panel

The 'Add Expense' panel consists of:

'Choose member' tab- here the user will click on the drop down arrow and select the correct member to which the expense is related to.

'No. EIS Credit, Member or Gas Card' tab- under this tab the user can indicate the number of the member

'No Personal Card user' tab- under this tab the user can indicate the personal card number of the member.

'Cash provided by EIS'- here the user will indicate the amount of cash provided

'Job name, site or company' tab- under this tab the user will indicate the name of the company or site related to the expense.

'Expense type' tab- here the user will indicate the type of expense incurred. This is simply done by clicking on the drop down arrow and selecting the correct expense.

'Description' tab- the user can add some details relating to the expense.

Auth#/Approval # tab- this tab indicates the authentication or approval number

'Time of Expense' tab- the user can indicate the time when the expense occurred.

'Date of Expense' tab- the user can indicate the date when the expense occurred in this tab.

'Truck/van number' tab- the user can indicate the van/truck number used during incase the expense is transport related.

'Tag #' tab- the user will indicate the tag number on this tab.

'Merchant name' tab- the user will indicate the name of the merchant o this tab.

'Location' tab- here the user can indicate the location where the transaction takes place

'Price' tab- here the user can indicate the price incurred during the transaction process

'Invoice' tab- here the user can upload the transaction invoice. To do this the user will click on the 'Select file' option and upload the relevant invoice.

Upon correctly filling all the expenses details, the user can now successfully add the expense into the system. This is done by clicking on the 'Save' tab located on the lowest left side of the panel.

The 'Reset' tab allows a user to reset the set of data in the panel. This can be used to delete the details of a certain expense.

Time Logs

The 'Time Logs' section in the EIS app helps a user know who is working on what project name, the start time and the end time of the project.

To access this user will click on the 'Time Logs' panel located in the Admin panel.

Admin Panel>Time Logs

The screenshot displays the 'Time Logs' interface within the EIS app's Admin Panel. At the top, there is a search bar and navigation options for language (English) and logout. The left sidebar lists various admin functions, with 'Time Logs' selected. The main content area is titled 'Time Logs' and includes a 'Filter Results' section with three filters: 'SELECT DATE RANGE' (2019-08-12 to 2019-08-19), 'SELECT PROJECT' (Select Project), and 'EMPLOYEE' (All). An 'Apply' button is present. Below the filters is an 'ACTIVE TIMERS' section, which is currently empty, showing 'No active timer.' The main 'Time Logs' section contains a table with the following columns: Id, Project, Employees, Start Time, End Time, Total Hours, Memo, and Action. The table is currently empty, displaying 'No data available in table'. There are also options for 'Export to Excel', 'Sticky Notes', and pagination controls.

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Screenshot showing 'Time Logs' panel

On the 'Time Logs' panel the user can:

Filter Results- this is done by choosing different parameters including the date range, project type and the employee.

Know the Active Timers- under this section the user can know who is working, on what project s/he is working on and for how long s/he has been active.

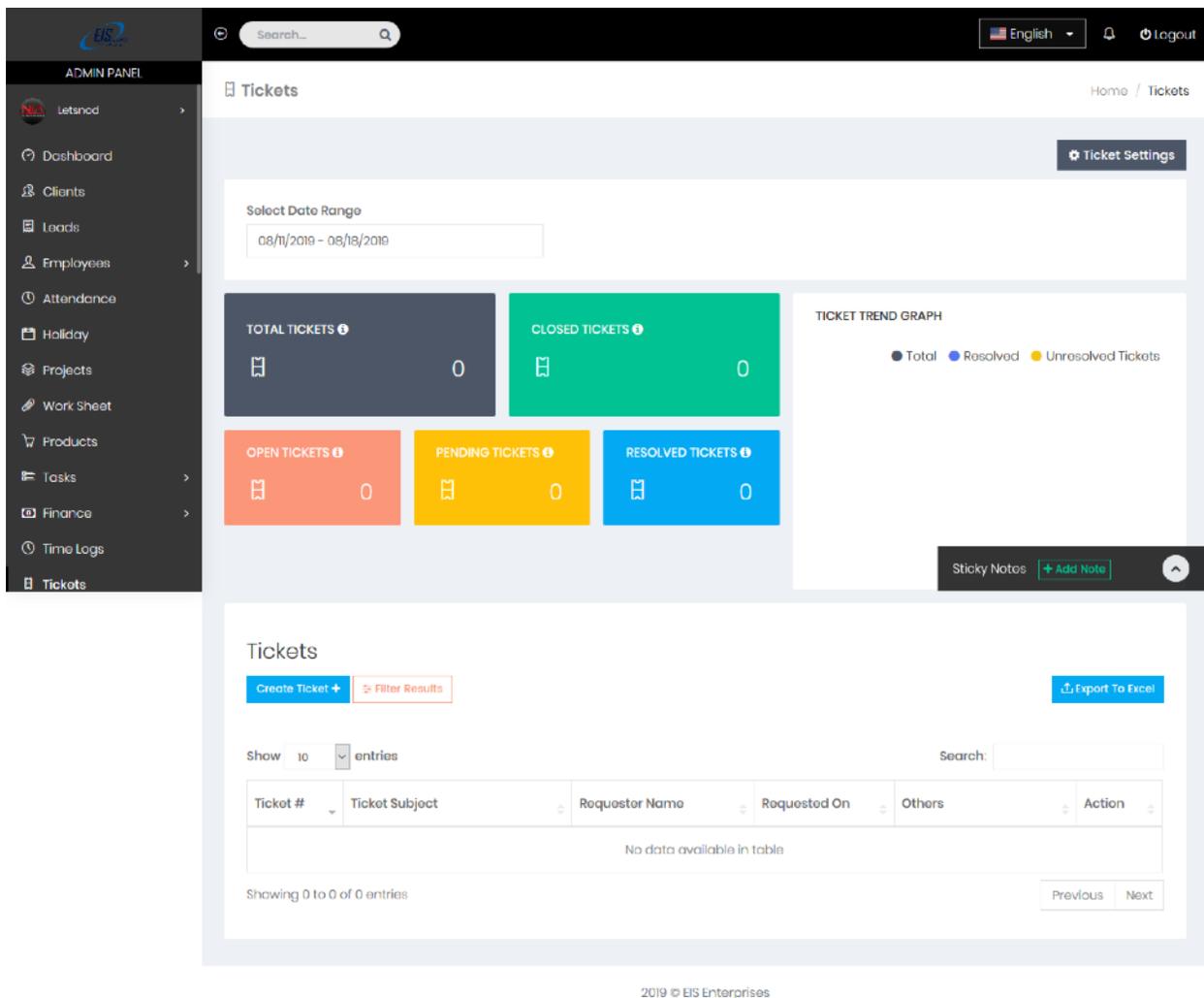
Time logs- under this section a table which comprises of the project, employees, start time, end time, total hours, memo and action will help the user analyze the time logs.

Tickets

The tickets section in the EIS app allows the user to create a ticket and also view the available tickets.

To access the tickets section, the user will click on the 'Tickets' tab which is located in the Admin panel

Admin panel>Tickets



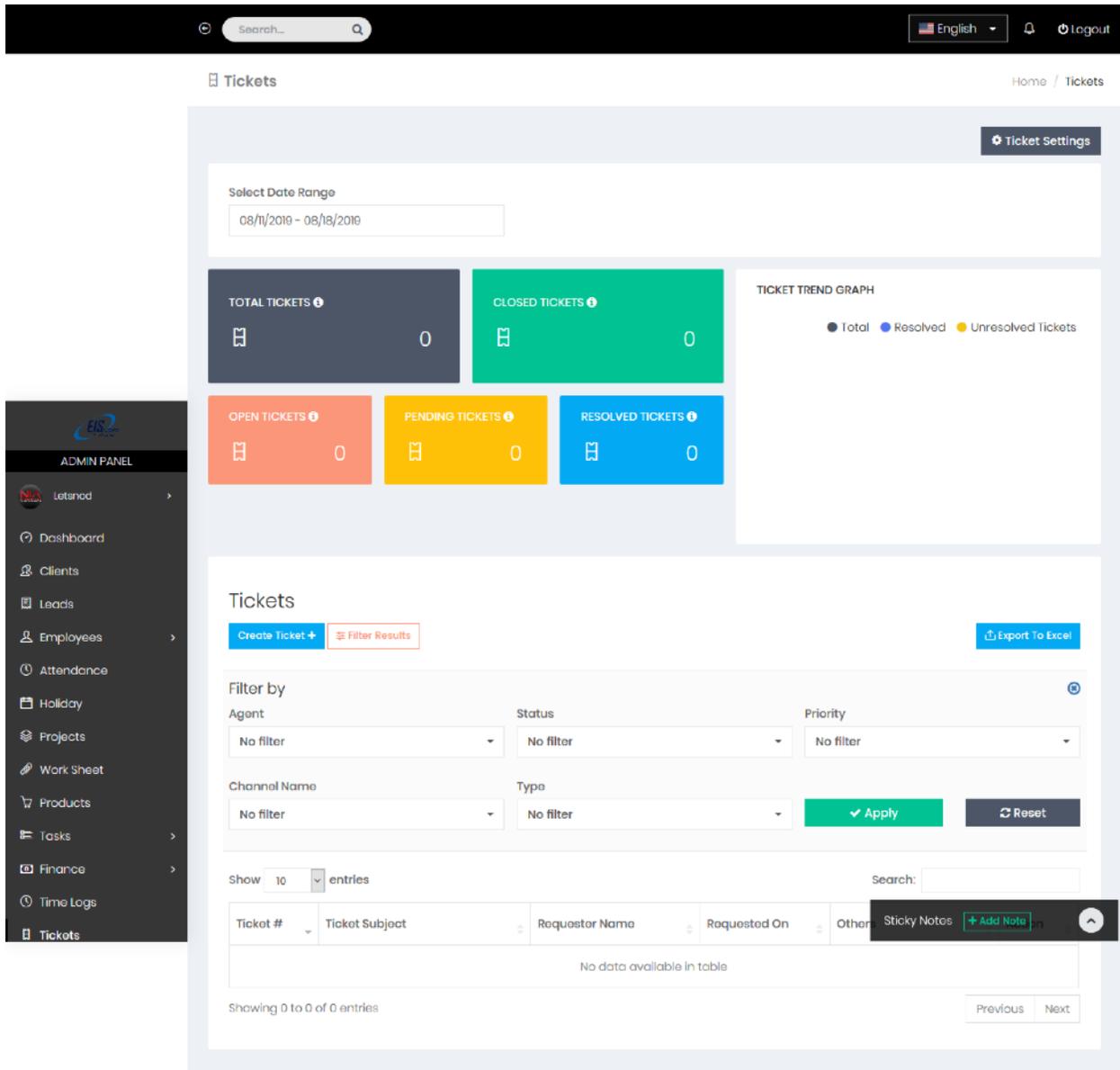
Screenshot showing the ‘Tickets’ panel

The ‘Tickets’ panel contains:

Metric boxes- these metric boxes located on the top of the panel simply shows the total number of tickets, closed tickets, open tickets, pending tickets and resolved tickets.

Filter results- with this tab, the user can get some refined results; this depends on the parameters input by the user.

Admin panel>Tickets>Filter results



Screenshot showing the 'Filter Results' panel

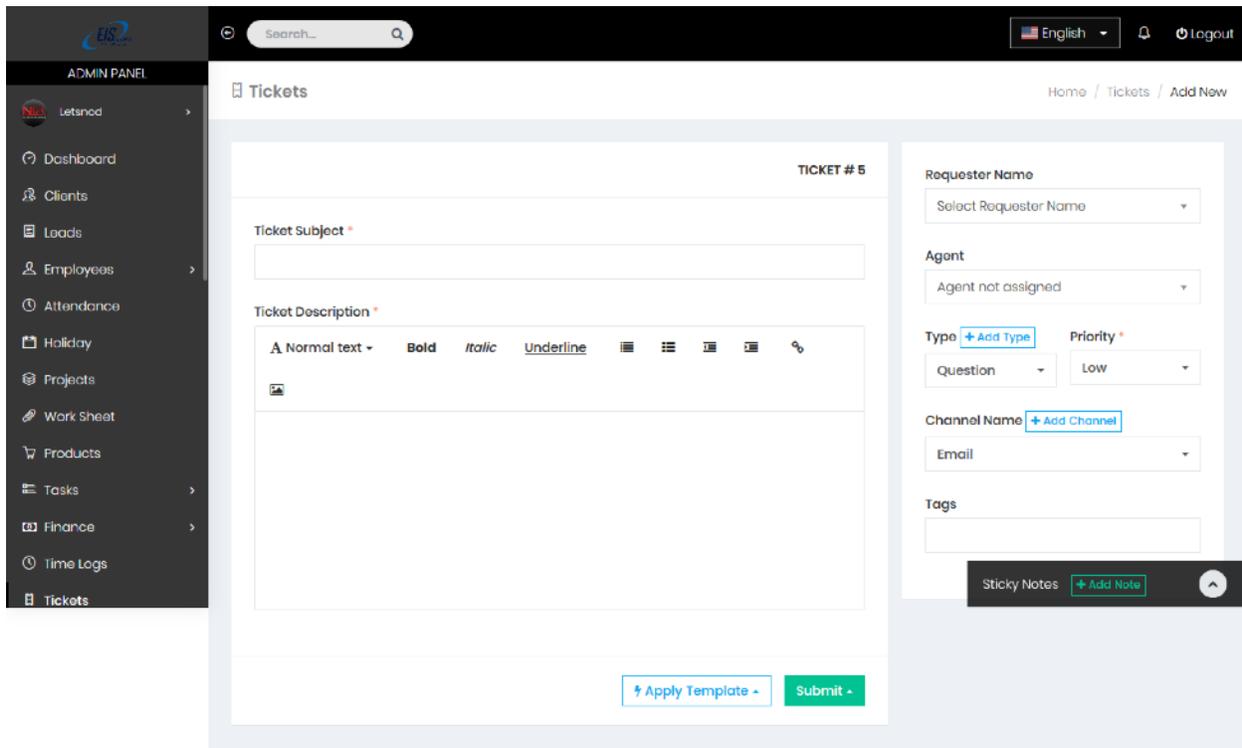
On the 'Filter Results' panel the user can define the parameters. The different parameters include the agent, status, priority, channel name and type.

Upon setting the parameters the user should click on the 'Apply' tab located on the 'Filter By' section. This will prompt a search which will appear on the results section.

Creating a ticket

To create a ticket, the user will click on the 'Create Ticket' tab located on the top left side of the panel. this will prompt a screen like the one shown below to appear.

Admin panel>Tickets>Add Ticket



The screenshot shows the 'Add Ticket' interface. On the left is a dark sidebar with an 'ADMIN PANEL' menu containing items like 'Dashboard', 'Clients', 'Loads', 'Employees', 'Attendance', 'Holiday', 'Projects', 'Work Sheet', 'Products', 'Tasks', 'Finance', 'Time Logs', and 'Tickets'. The main content area is titled 'Tickets' and has a breadcrumb 'Home / Tickets / Add New'. The form is for 'TICKET # 5' and contains the following fields and controls:

- Ticket Subject ***: A text input field.
- Ticket Description ***: A rich text editor with a toolbar (Normal text, Bold, Italic, Underline, Bulleted list, Numbered list, Indent, Outdent, Link, Unlink) and an image icon.
- Requester Name**: A dropdown menu with 'Select Requester Name'.
- Agent**: A dropdown menu with 'Agent not assigned'.
- Type**: A dropdown menu with 'Question' and a '+ Add Type' button.
- Priority ***: A dropdown menu with 'Low'.
- Channel Name**: A dropdown menu with 'Email' and a '+ Add Channel' button.
- Tags**: A text input field.
- Sticky Notes**: A section with a '+ Add Note' button and an upward arrow.
- Buttons**: 'Apply Template' and 'Submit' buttons at the bottom.

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Screenshot showing 'Add Tickets' panel

This panel consists of:

Ticket subject- the user will key in the subject of the ticket. (Compulsory)

Ticket description- under this tab the user will key in some important details relating to the ticket (compulsory).

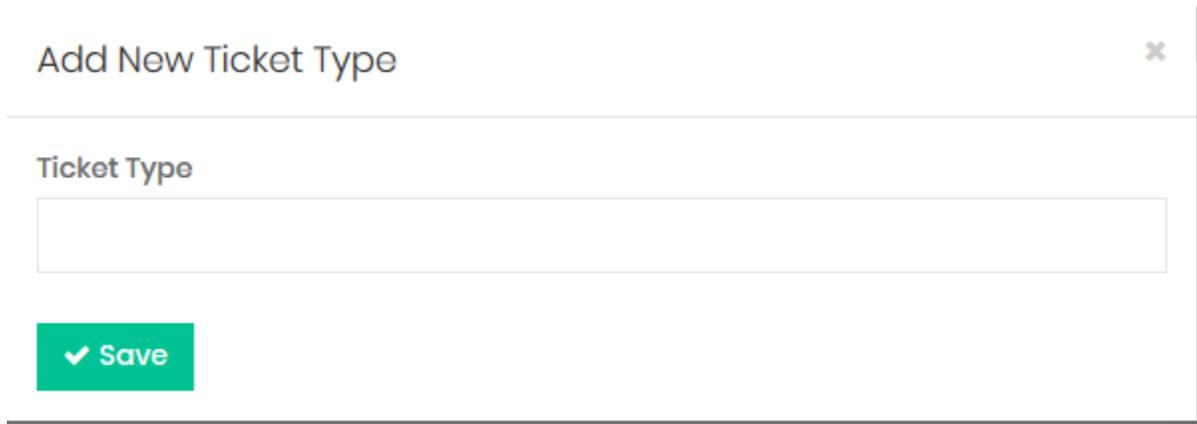
Requester name- the user will select a name from the list by clicking on the drop down arrow.

Agent- the user will key in the agent assigned the ticket by clicking on the drop down arrow and selecting an agent.

Type- the user will assign the 'type' of ticket by clicking on the drop down arrow and selecting the suitable type.

The user can also add a new type into the list; this is done by clicking on the 'Add type' tab located in the 'type' section.

Admin panel>Tickets>Add Type



Screenshot showing 'Add new ticket type' panel

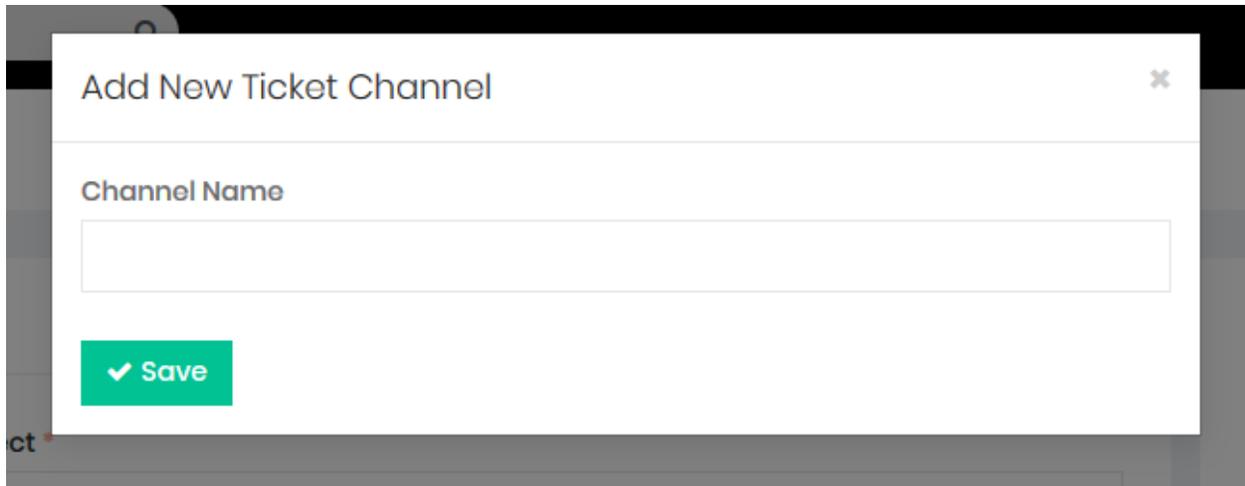
Here the user will type in the new ticket type on the empty tab and save it.

Priority- the user will indicate the priority of the ticket by clicking on the drop down arrow and selecting the priority from the provided options.

Channel name-on this tab the user will indicate the channel name. This can be done by clicking on the drop down arrow and selecting from the available options. The channels can include a Facebook account, an email address, Twitter account or a phone.

Incase, the user feels that his/her channel is not incorporated into the system. S/he can click on the 'Add Channel' tab.

Admin panel>Tickets>Add channel



Screenshot showing 'Add new ticket channel' panel

The user will key in the name of the channel s/he wished to be incorporated into the channel list. The user will click on the 'Save' tab to successfully add the new channel.

Tags- the user will key in specific tags to aid the identification of the ticket.

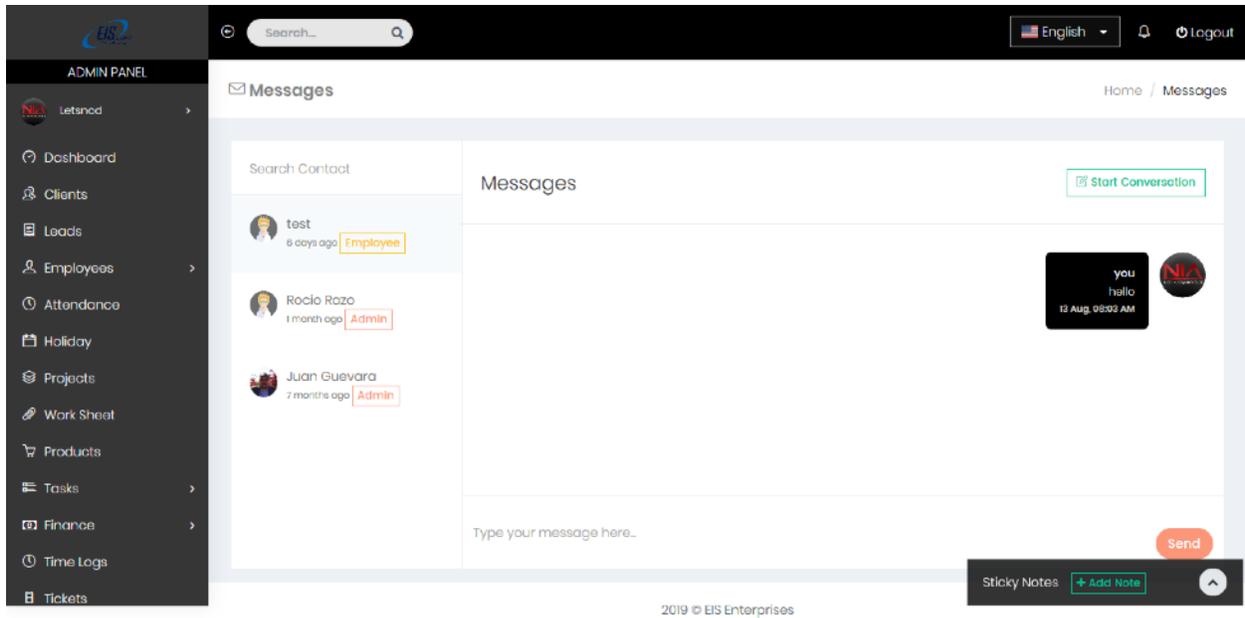
Finally the user can click on the 'Submit' tab located on the bottom right side of the panel. With this the ticket will be successfully submitted.

Messages

The 'Messages' section helps the different members to communicate effectively.

This tab is located in the Admin panel.

Admin panel>Messages

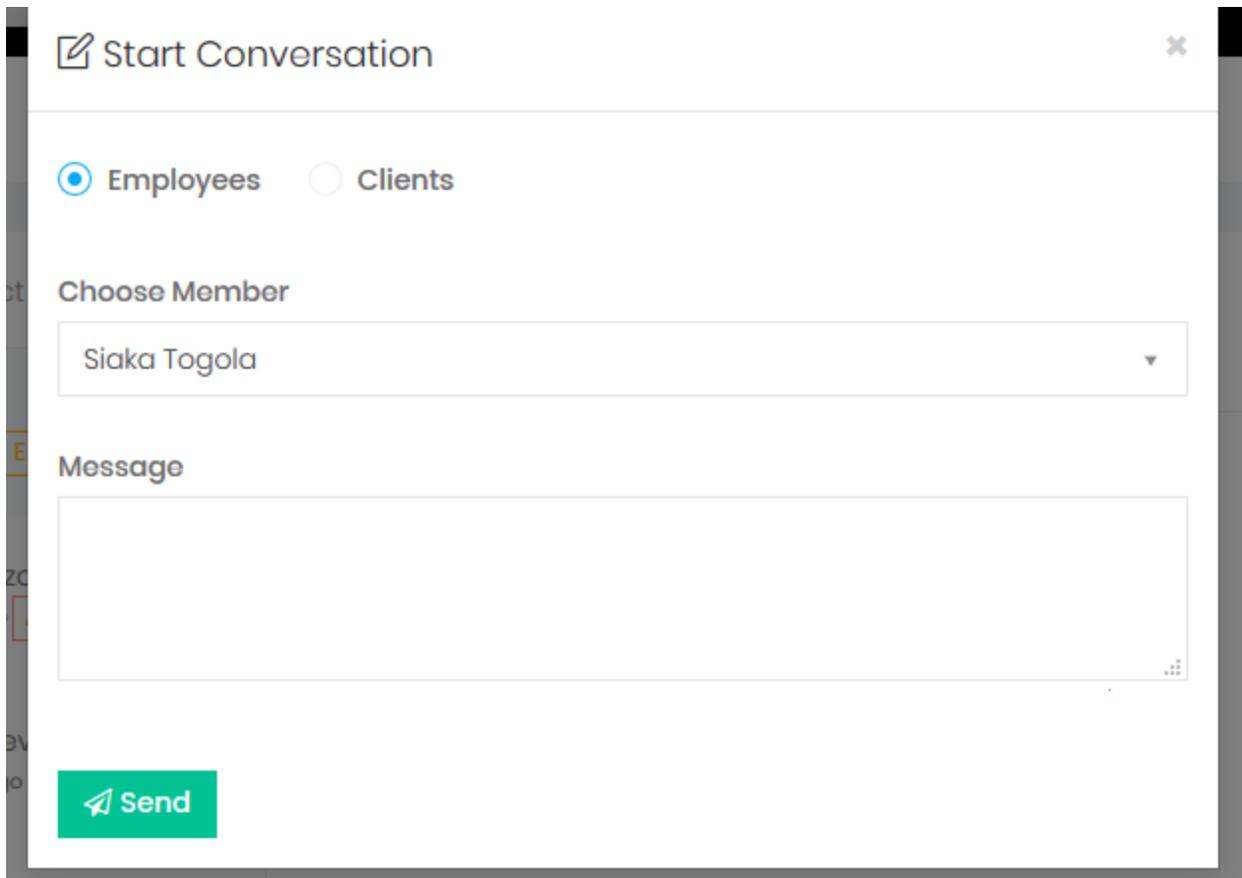


Screenshot showing the 'Messages' panel

On this panel the user can:

Start a conversation- the user can achieve this by clicking on the 'Start conversation' tab located on the top right hand side of the panel.

Admin panel>Messages>Start conversation



Screenshot showing 'Start conversation' panel

On this panel the user will:

Select whether the member being messaged is an employee or a client, this is done by checking on the check circles.

Choose a member to whom the message is being sent, this is done by clicking on the drop down arrow and choosing the member.

Writing a message-this is done on the blank tab on the under the message tab.

Sending the message- the user will click on the 'Send' message tab located on the bottom right side of the panel.

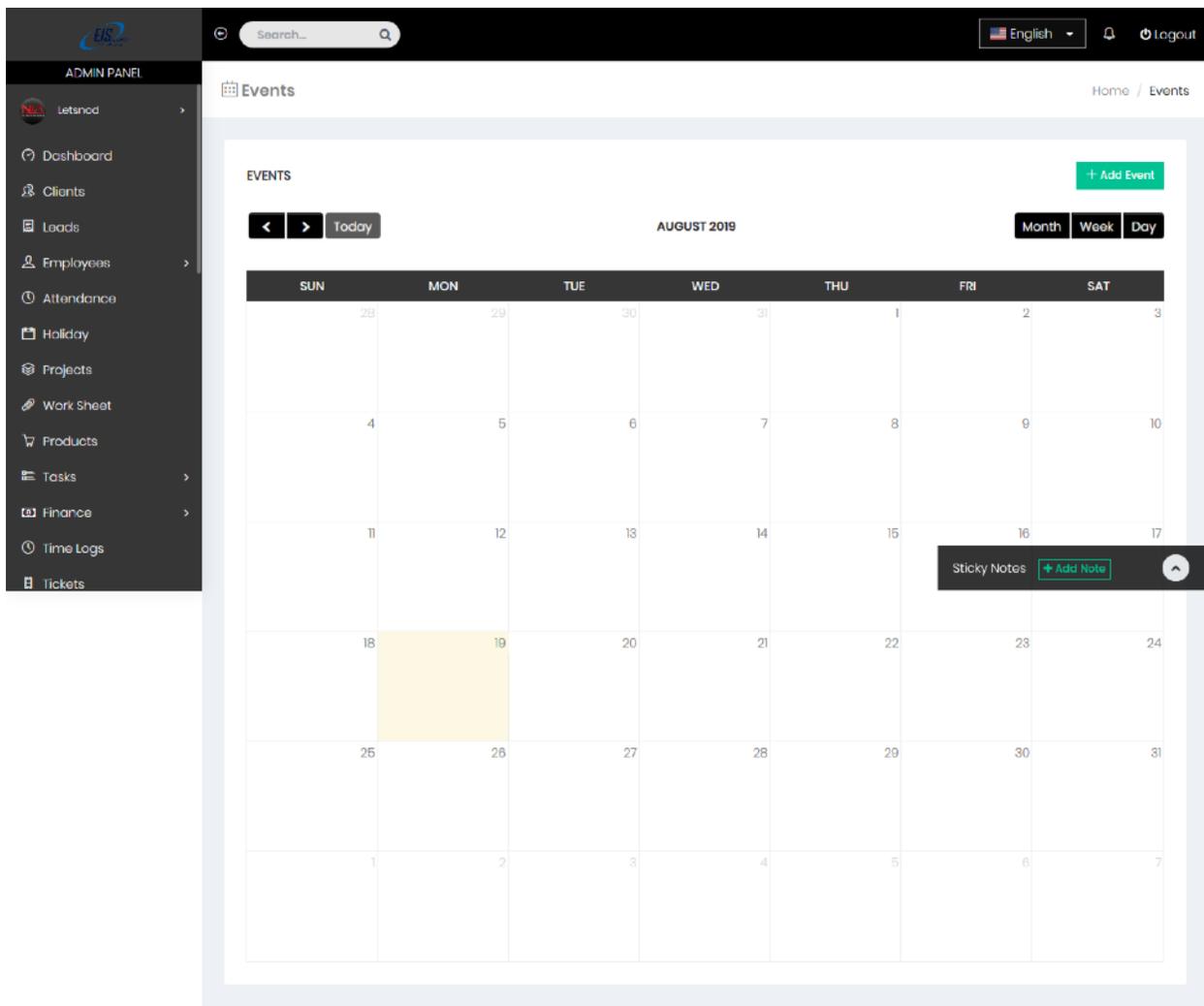
Searching for a contact- the user can click' on the 'Search contact' tab located on the top left side of the panel. From here the user will type the name of the contact s/he is searching for.

The user can also type an open message on the 'Type your message' tab located below the panel. Upon typing the message the user will click on the 'Send; tab. This message will be viewed by the all the contacts in the panel.

Events

This section allows the user to view important upcoming events. To access this panel the user will click on the 'Events' panel located on the Admin panel.

Admin Panel>Events



Screenshot showing the 'Events' panel

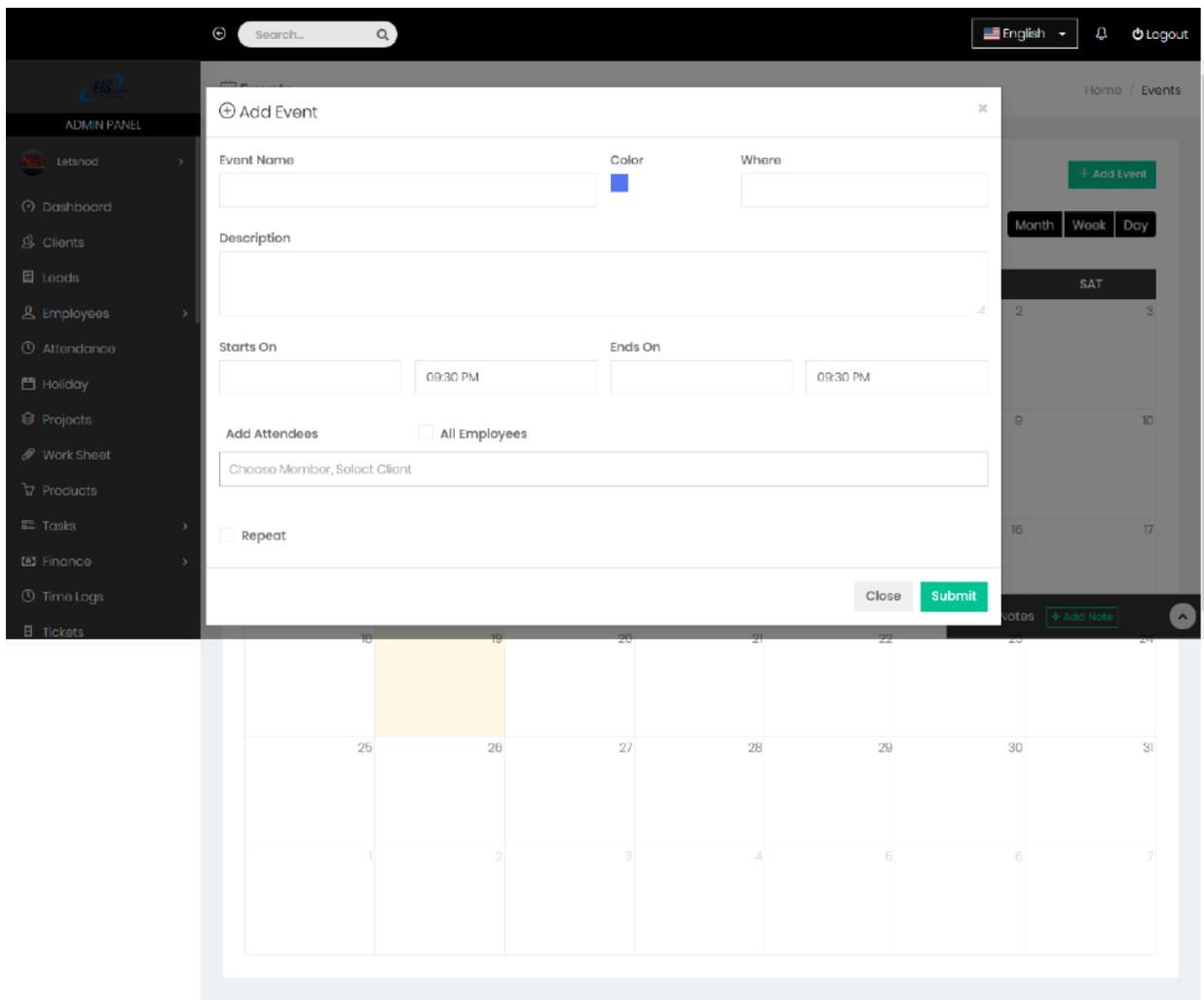
On this panel a user can:

View the upcoming important events on the calendar.

Adding an event

To add an event the user will click on the 'Add Event' tab which is located on the top right hand side of the panel.

Admin panel>Events>Add Event



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Screenshot showing 'Add Events' panel

The tabs available on the 'Add Event' panel include:

'Event Name' tab- the user keys in the name of the event.

'Where' tab- on this tab the user fills in the location of the event.

'Description' tab- this is where the user fills in some details of the events.

'Starts on' tab- the user keys in the date when the event will start.

'Ends on' tab- this is where the user fills in the time at which the event will end.

'Add Attendees' tab- this tab allows the user to include the members to be involved in the event at hand.

Ticking on the 'All Employees' tab located next to the Add Attendees tab will automatically include all employees into the event.

'Repeat' tab- incase the event is recurrent the user can set a repeat cycle by setting the cycle parameters.

To successfully add an event into the system, the user will click on the 'Submit' tab located on the bottom right side of the panel.

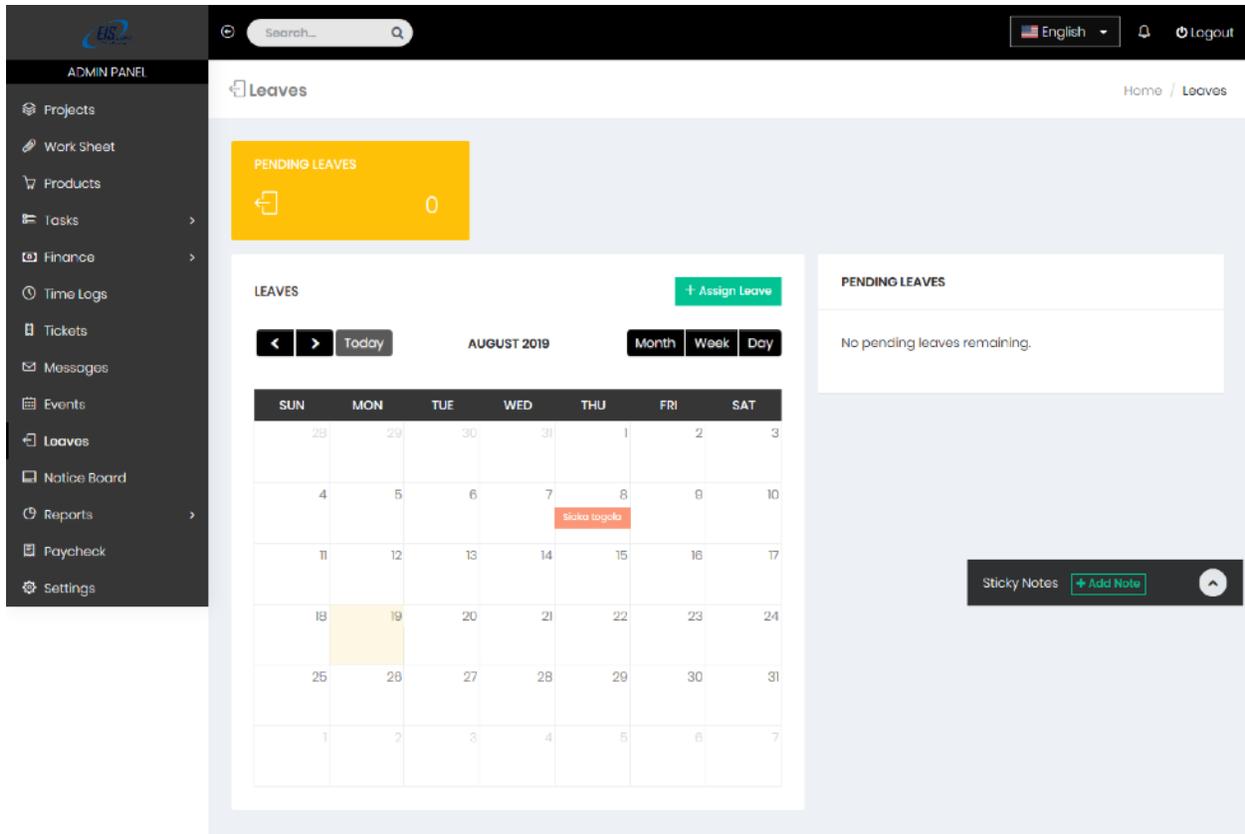
The 'Close' tab is used to close the panel. Clicking on this tab won't effect any changes on the system.

Leaves

The 'Leaves' section on the EIS app allows the user to know the employees who are on leave, know the pending leaves while also helping a user assign a leave successfully.

To access the Leaves section the user will click on the 'Leaves' tab which is located on the Admin Panel.

Admin Panel> Leaves

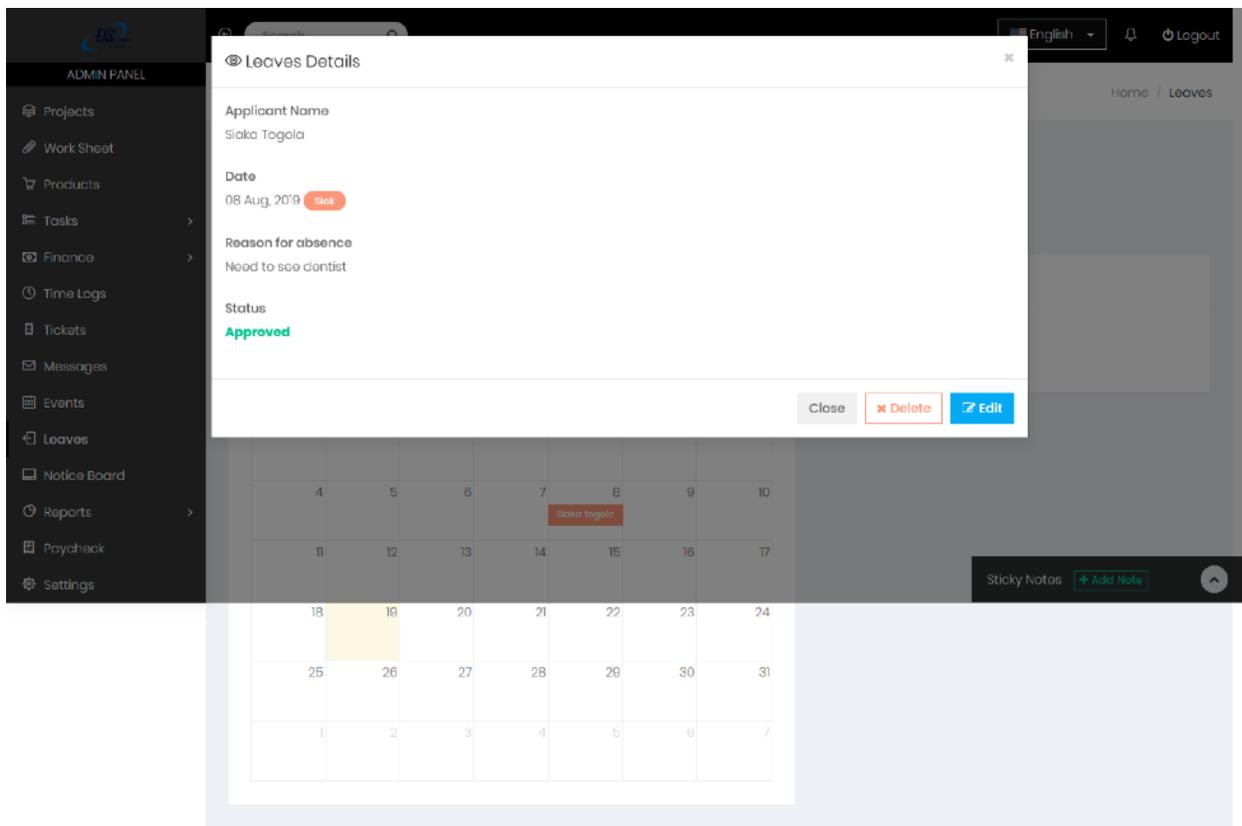


2019 © EIS Enterprises

Screenshot showing the 'Leaves' panel

The 'Pending leaves' metric box located on the top left side of the panel enables the user to know the number of pending leaves for the members.

The calendar available in the 'Leaves' panel allows the user to know which of the members is on leave and on what date. For more details on this a user can click on the name of the player on a specific date. This will present all the details of the leave, including the applicant's name, date, reason for absence and the status.



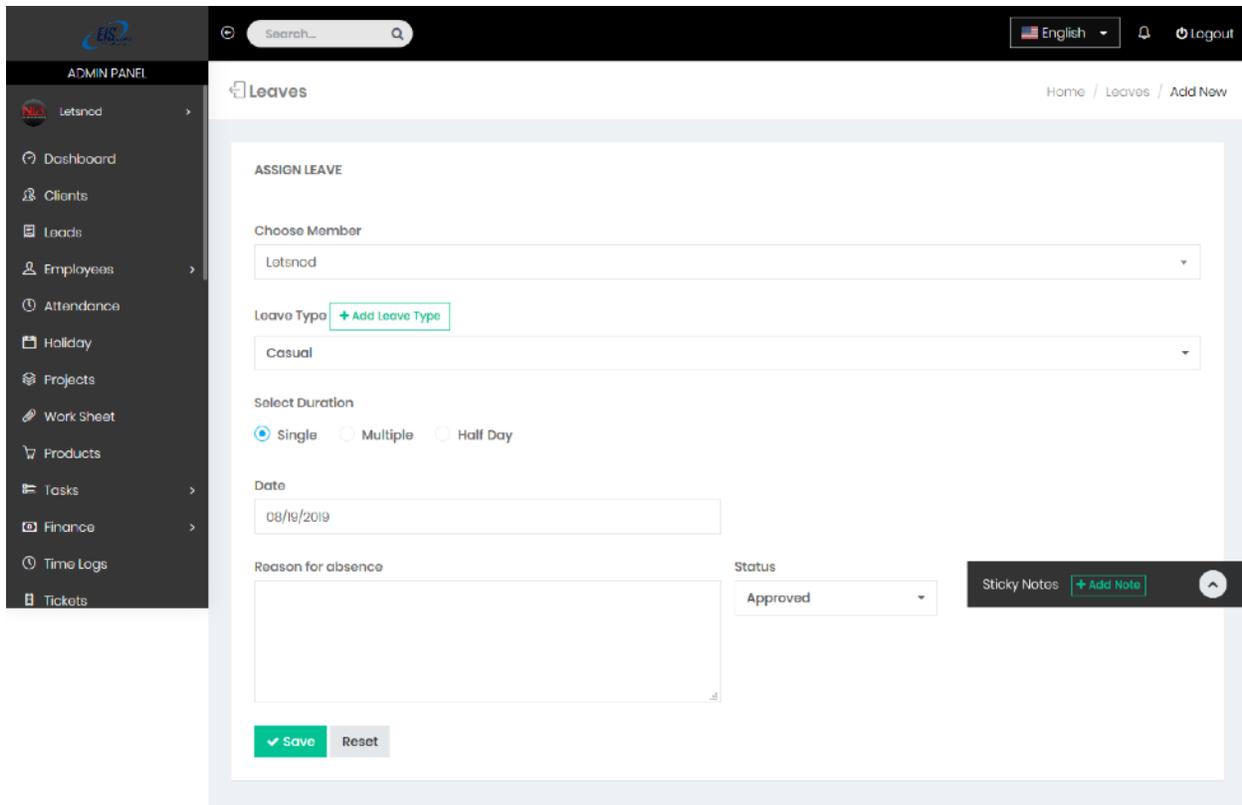
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Screenshot showing 'Leave Details' panel

Assigning a leave

To assign a leave, the user will click on the 'Assign Leave' tab.

Admin Panel>Leaves>Assign a Leave



Screenshot showing 'Assign Leave' panel

This panel contains:

'Choose member' tab- under this tab, the user can choose the member to be assigned a leave

'Leave type' tab- under this tab, the user can choose the type of leave being assigned.

'Select Duration' tab- under this tab, the user will select the duration from the given options.

'Date' tab- under this tab, the user will key in the date.

'Reason for absence' tab- under this tab, the user can key in some detail explaining the reason for a member's absence.

'Status' tab- under this tab, the user will indicate whether the leave is approved or pending.

The user will successfully update the leave details by clicking on the 'Save' tab located on the bottom left side of the tab.

Clicking on the 'Reset' tab will clear all the details in the panel.

Notice Board

Just like the office notice board, the EIS app noticeboard section allows the user to readily post any vital notices/happenings of the company.

To access the 'Noticeboard' panel the user will click on the 'Noticeboard' tab located on the Admin Panel.

Admin Panel>Noticeboard

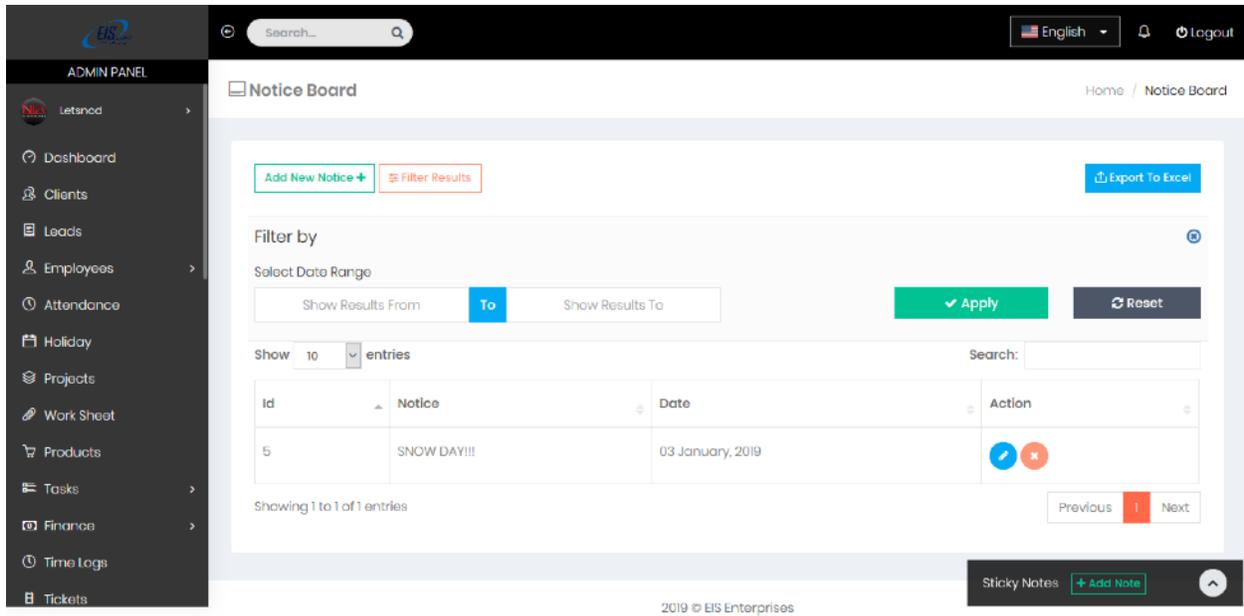
The screenshot displays the 'Notice Board' interface within the EIS app. On the left is a dark sidebar menu with 'ADMIN PANEL' highlighted. The main content area features a search bar at the top, followed by 'Add New Notice +' and 'Filter Results' buttons. Below these is a table with one entry: 'SNOW DAY!!!' on '03 January, 2019'. The table has columns for 'Id', 'Notice', 'Date', and 'Action'. The 'Action' column contains edit and delete icons. Below the table is a pagination control showing 'Showing 1 to 1 of 1 entries' and 'Previous 1 Next'. The footer includes '2019 © EIS Enterprises' and a 'Sticky Notes + Add Note' button.

Screenshot showing the 'Notice Board' panel

On this panel the user can:

View all the firm’s notices firsthand, also for a refined search can click on the ‘Filter Results’ tab located on the top left side of the panel.

Admin Panel>Noticeboard>Filter Results



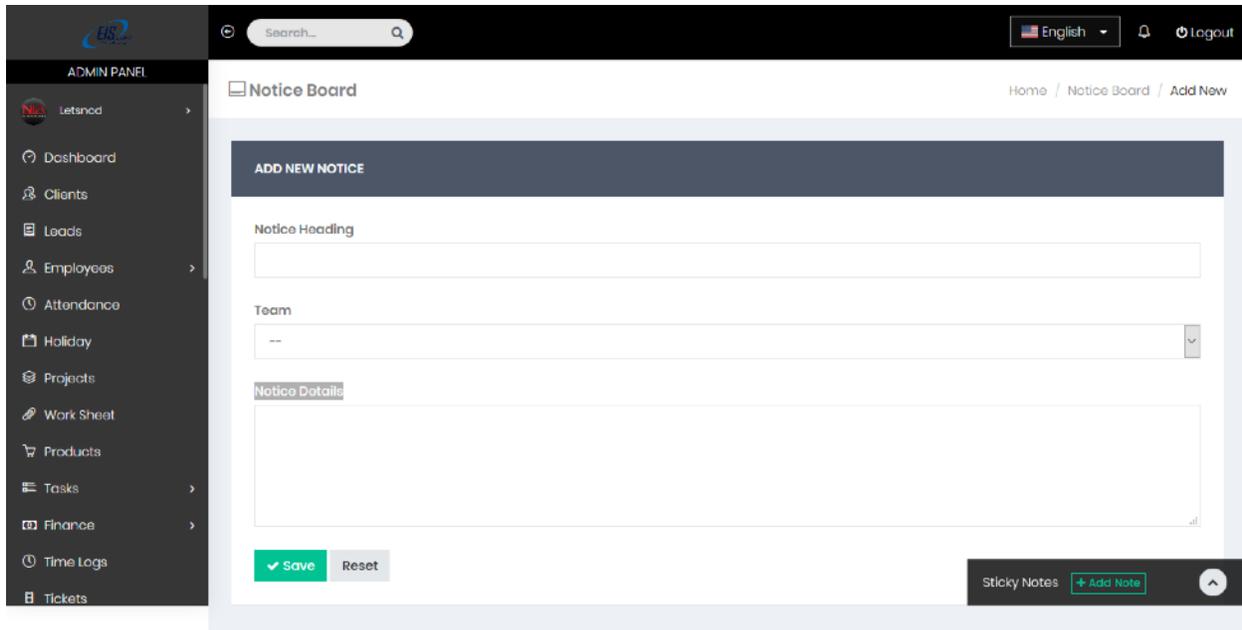
Screenshot showing ‘Filter By’ panel

For a more refined search, the user can define the date parameters and click on the ‘Apply’ tab. The search results will be displayed in the results section.

Adding a new notice

To add a new notice, the user will click on the ‘Add New Notice’ tab located on the left side of the panel.

Admin Panel>Noticeboard>Add New Notice



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Screenshot showing 'Add new notice' panel

The 'Add New Notice' panel contains the following tabs:

'Notice Heading' tab-here the user will key in the heading of the notice.

'Team' tab- the user will select the appropriate team from the drop down arrow.

'Notice Details' tab- under this tab the user will key in vital notice details.

User will click on the 'Save' tab to update the notices.

User will click on the 'Reset' tab to clear the notice details.

Reports

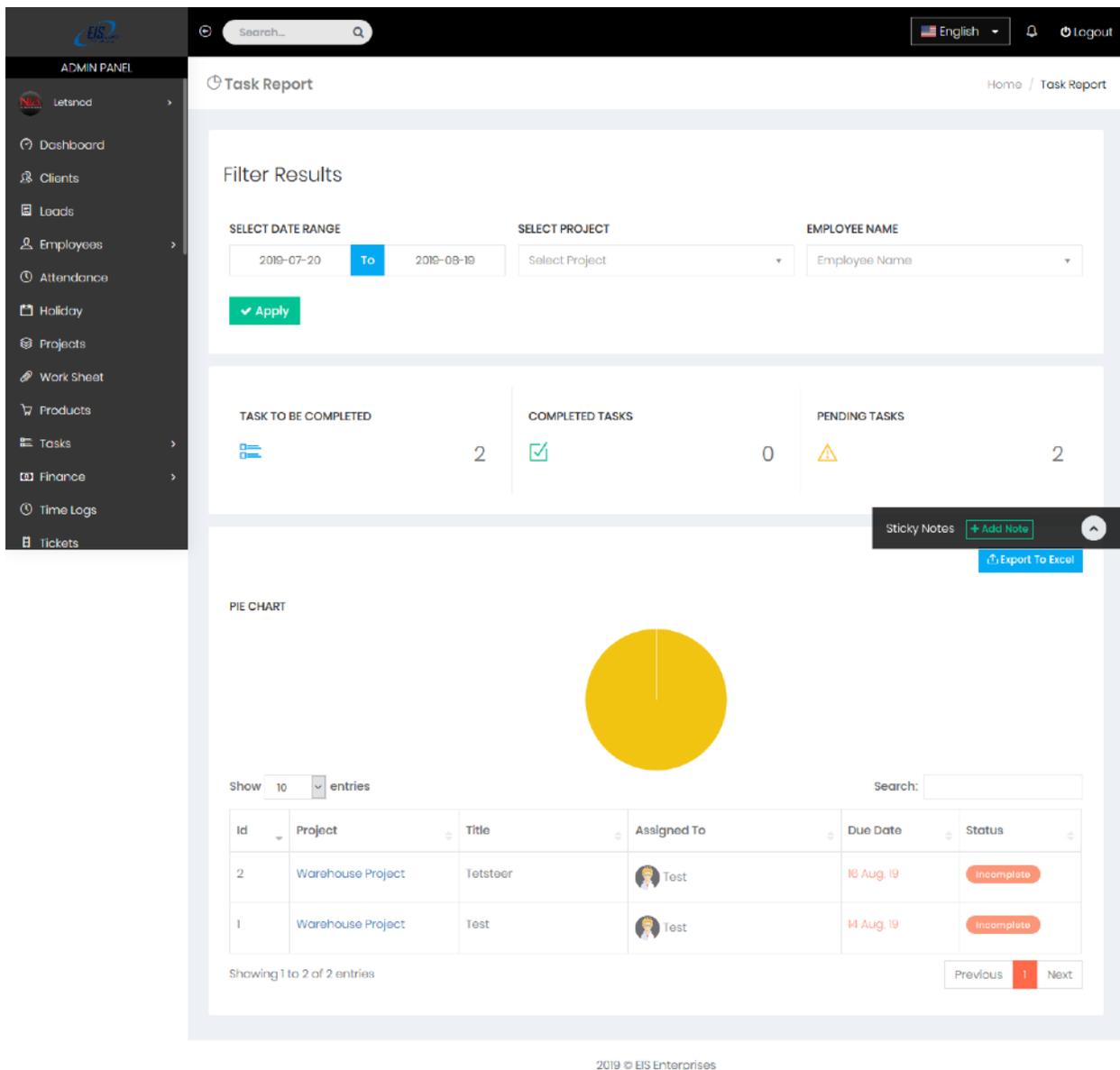
A firm's reports are vital since they can have a significant impact on the firm, fundamentally changing the way people perform their jobs and also how a firm's decision are made. The EIS app is all about processing timely data, proper reporting thus providing our users with immense analytic capabilities.

To get started on the repots sections a user will click on the 'Reports' tab located on the Admin Panel. A drop down menu containing different type of reports will appear.

Task report

This type of report is all about tasks assigned to the employees. To get started a user will click on the 'Task Reports' tab located on the Admin panel.

Admin panel>Reports>Task Reports



Screenshot showing 'Task Report' panel

The 'Task Report' panel will provide:

Complete metrics in relation to the Tasks to be completed. Completed tasks and also the pending tasks.

Allow the user to perform a more refined search on the 'Filter Results' tab, where the user gets to define the filter parameters.

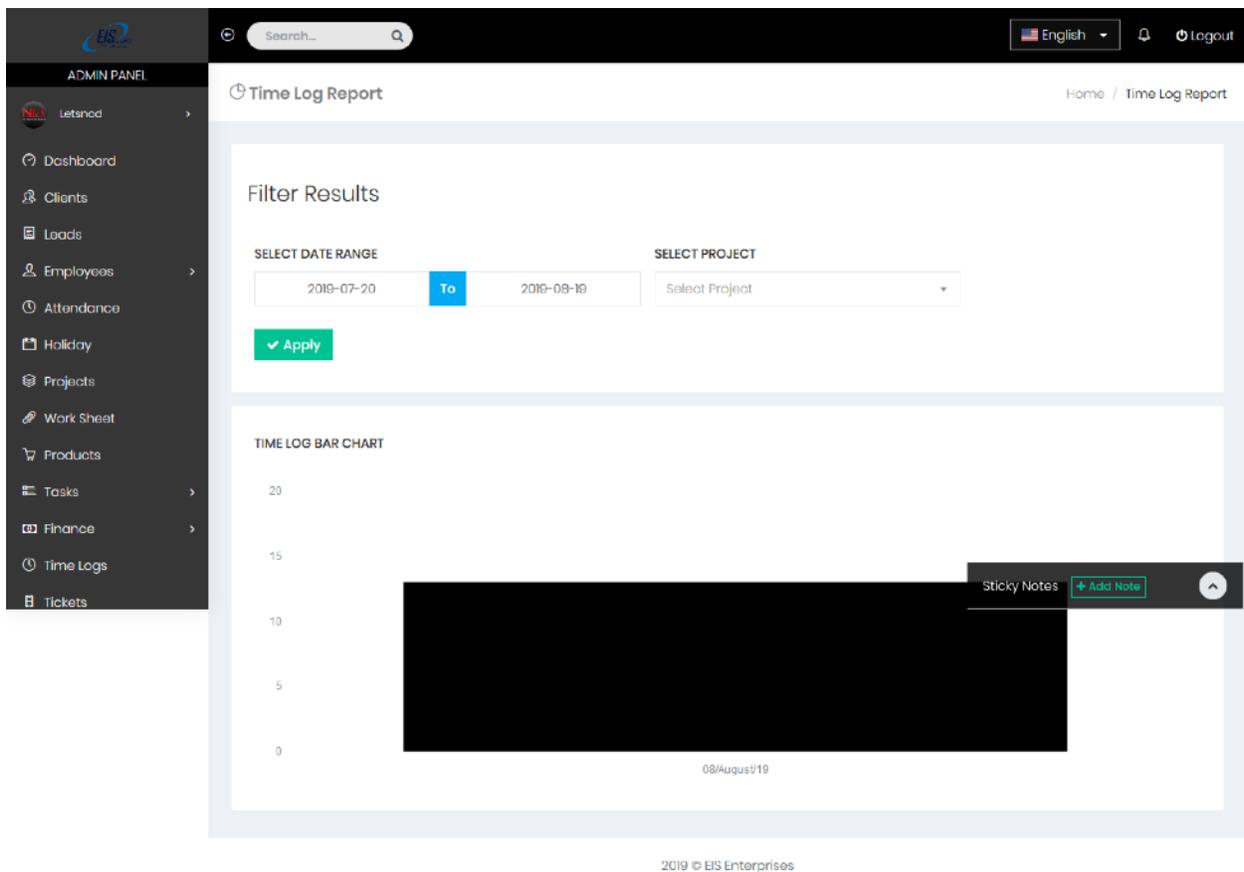
Upon defining the search parameters, the user will click on the 'Apply' tab. This will help display the results.

A pie chart which gives the user a simplified analysis of the task reports.

Time log report

This report gives the user a broken down analysis of the time logs. A user will click on the 'Time Log Report' tab located on the Admin panel.

Admin panel>Reports>Time Log Report



Screenshot showing 'Time Log Report' panel

On the time log report the user can:

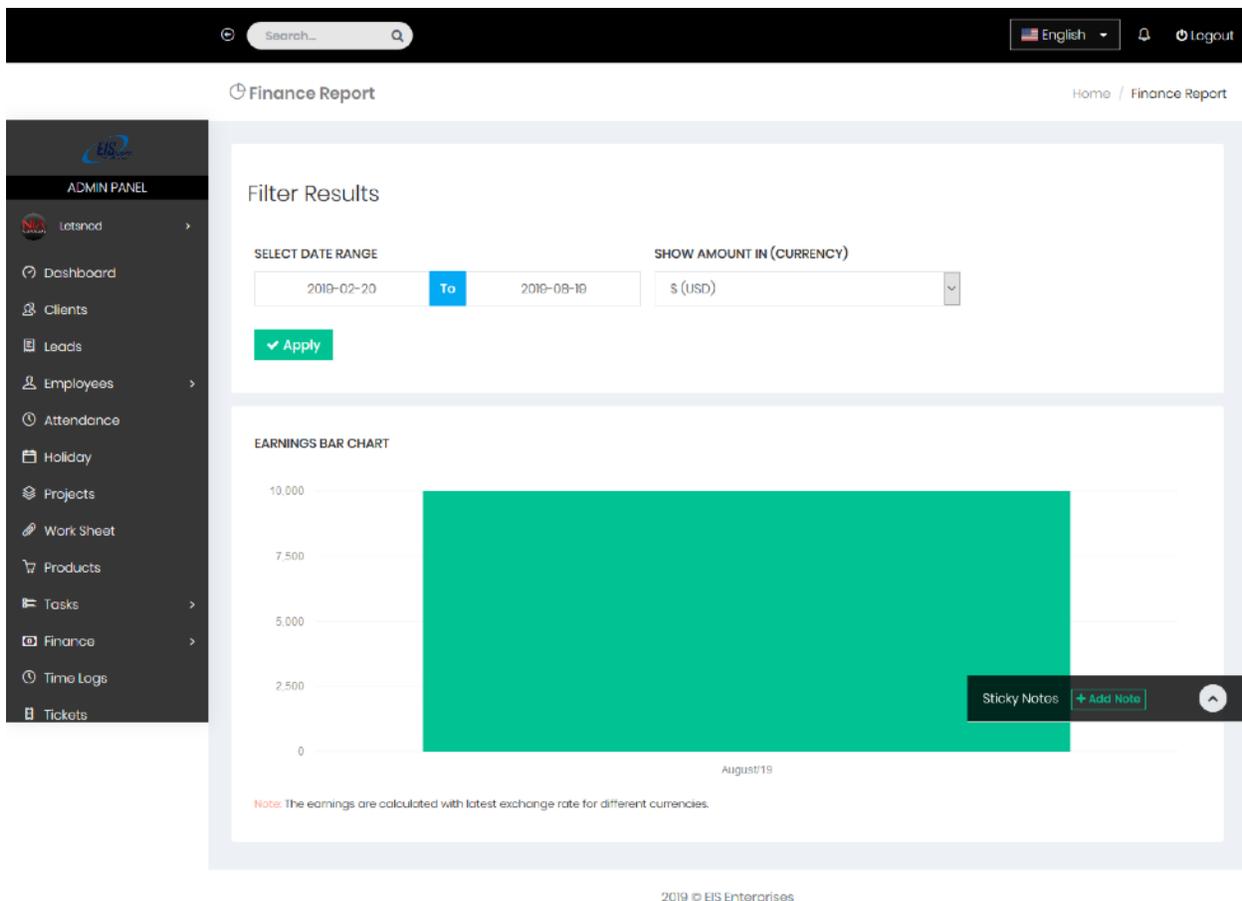
Perform a refined results search- this is achieved in the 'Filter Results'. The user will simply input the different parameters including the date range and the project on the provided respective tabs.

Upon the input of the filter parameters, the user will click on the 'Apply' tab. The search result will be displayed in the 'Time Log Bar chart'.

Finance Report

This type of report gives the user a simplified analysis of financial results and related information. To access this user will simply click on the Finance Report located under the Reports section on the Admin Panel.

Admin Panel>Reports>Finance Report



Screenshot showing 'Finance Report' panel

On the Finance Report, the user can:

Get a financial report relating to a certain period. This is done by keying in the date range parameters in the Filter Results section.

Upon doing this, the user will then click on the 'Apply' tab located below the 'Filter Results' section.

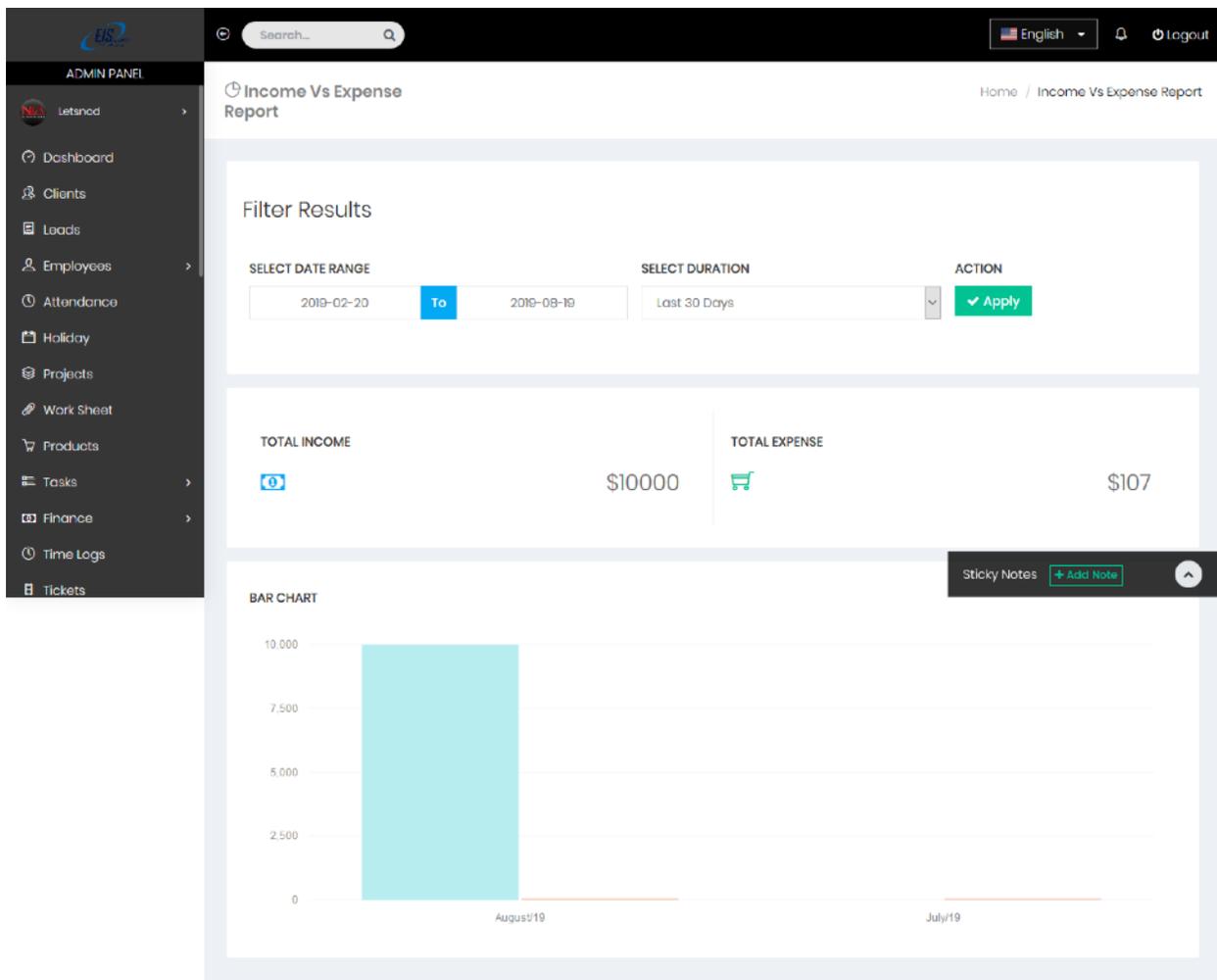
Results will be displayed on the 'Earnings Bar chart' located just below the 'Filter Results' section.

From the bar chart the user can effectively analyze the results.

Income Vs Expense Report

This income gives you an overview and a detailed view of the income and spending in your budget accounts. To access this report, the user will simply click on the 'Income Vs Expense' tab located under the 'Reports' section in the Admin Panel.

Admin Panel>Reports>Income Vs Expense Reports



Screenshot showing an 'Income Vs Expense' panel

On this panel a user will be able to:

Filter results- this is achieved by keying in date ranges while also selecting the duration.

The user can then click on the 'Apply' tab this will help in the generation of a report.

From the results, the user can view the total income metrics and total expense metrics, these are presented in the panel.

Effectively analyze the results displayed in the 'Bar Chart' section.

Leave Report

This report helps a user to accurately track the employees' leave. To get started a user will click on the 'Leave Report' tab under the Reports' section under the Admin Panel.

Admin Panel>Reports>Leave Report

Search_ English Logout

Home / Leave Report

ADMIN PANEL

- Letanod
- Dashboard
- Clients
- Leads
- Employees
- Attendance
- Holiday
- Projects
- Work Sheet
- Products
- Tasks
- Finance
- Time Logs
- Tickets

Leave Report

Filter Results

SELECT DATE RANGE: 2019-07-20 To 2019-08-19

EMPLOYEE NAME: Select Employee

Apply

LEAVE REPORT

Show 10 entries Search:

Id	Employee	Approved Leaves	Pending Leaves	Upcoming Leaves	Action
	Letanod	View	View	View	Export
	Siaka Togola	View	View	View	Export
	Juan Guevara	View	View	View	Export
	Xiomara Brown	View	View	View	Export
	Rocio Razo	View	View	View	Export
	ADRIAN G. MIRANDA GARCIA	View	View	View	Export
	ANDREW JAMES SCHWAB	View	View	View	Export
	CHARLES VICENT HARVEY	View	View	View	Export
	DEON M. AMBUSH	View	View	View	Export
	DIMAS ISAAC GONZALEZ ARQUETA	View	View	View	Export

Showing 1 to 10 of 82 entries

Previous 1 2 3 4 5 6 7 Next

Sticky Notes + Add Note

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Screenshot showing 'Leave Report' panel

On the 'Leave Report' Panel the user can:

Get some refined results relating to the leaves extended to the employees. To do this the user will define the filter parameters in the 'Filter Results' section, these parameters include the 'Date range' and the 'Employee name'.

Upon defining the filter parameters, the user can click on the 'Apply' tab.

With this action, the system will generate the search results in the results section.

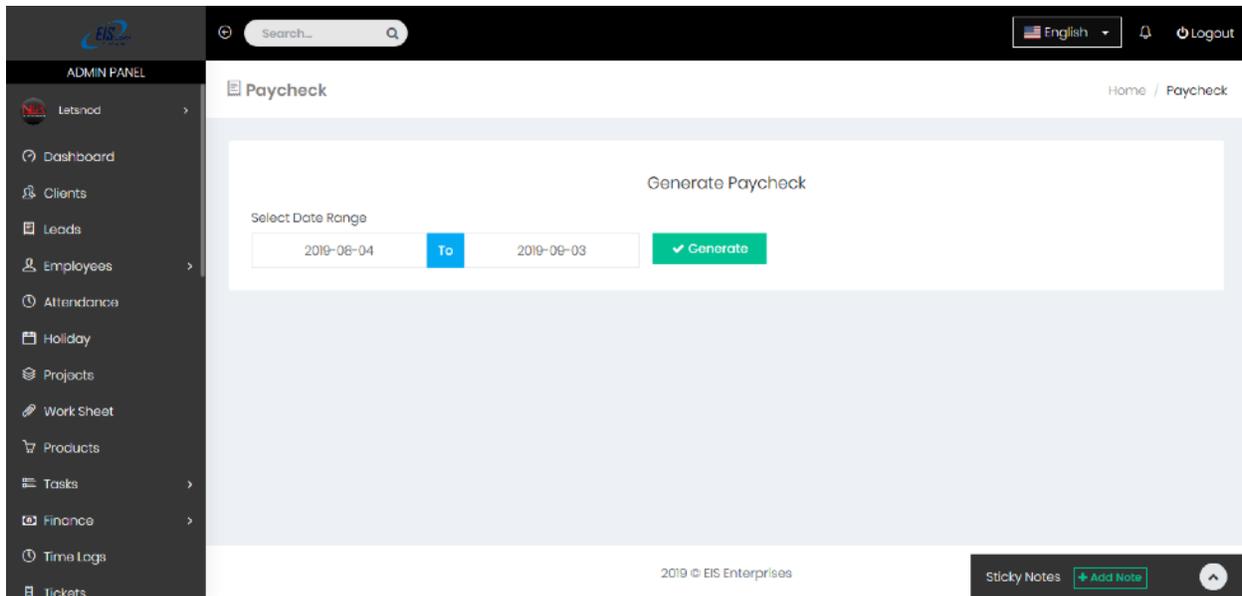
From here the user can analyze the results from the search. To do this the user will simply click on the 'View' tab located on each result.

Paycheck

This section in the ESI app allows a user to generate an exclusive paycheck sheet, this sheet provide a wealth information about the firm's employees and payroll expenses.

To access the paycheck section, the user will simply click on the 'Paycheck' tab located on the Admin Panel.

Admin Panel>Paycheck



Screenshot showing 'Paycheck' panel

On this panel the user will:

Select the 'Date Range' on the tabs provided and click on the 'Generate' tab.

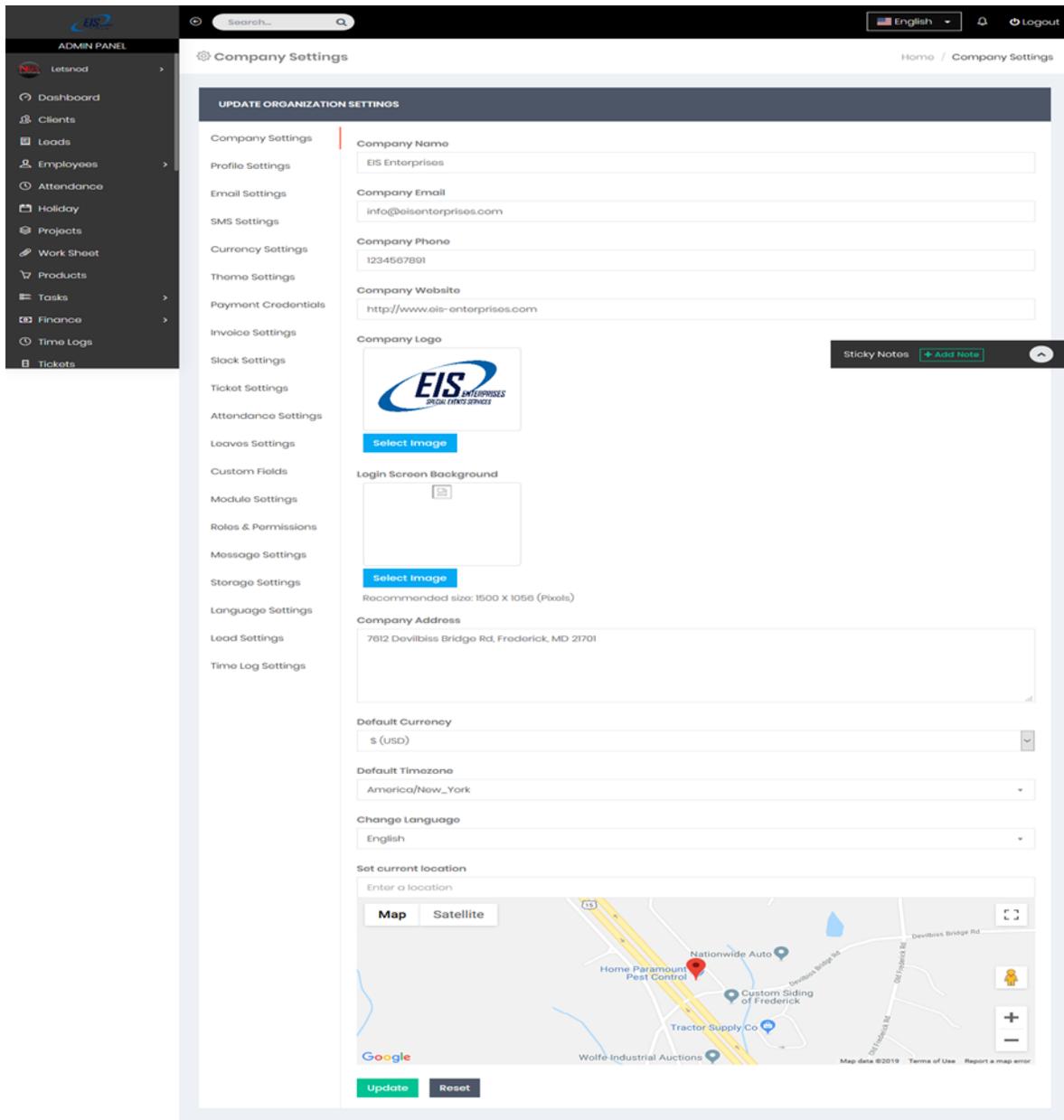
Admin panel>Paycheck>Generate>Download

The user can click on the 'Download' tab. The paycheck will be presented in an excel sheet where the user can analyze the results.

Settings

The 'Settings' section in the ESI app allows the users to indicate the preference for how an app should behave. To access this panel the user will click on the 'Settings' tab located on the Admin panel.

Admin Panel>Settings

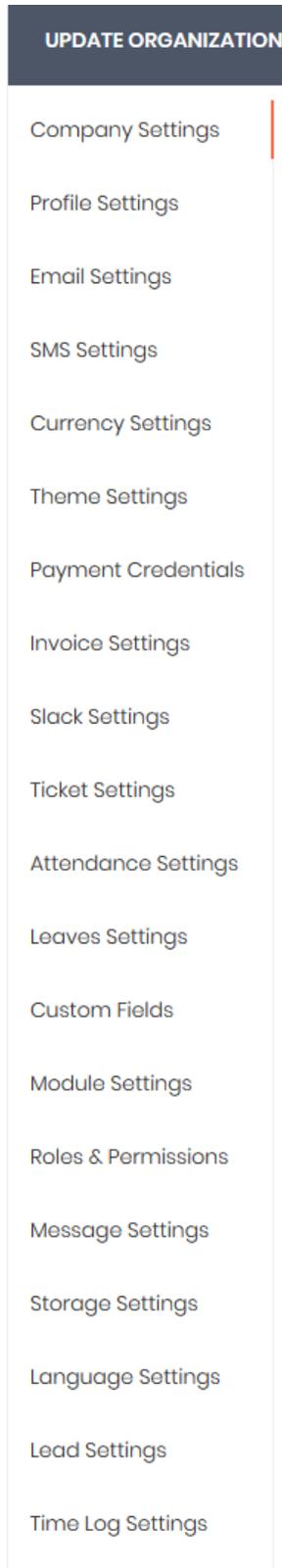


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Screenshot showing 'Settings' panel

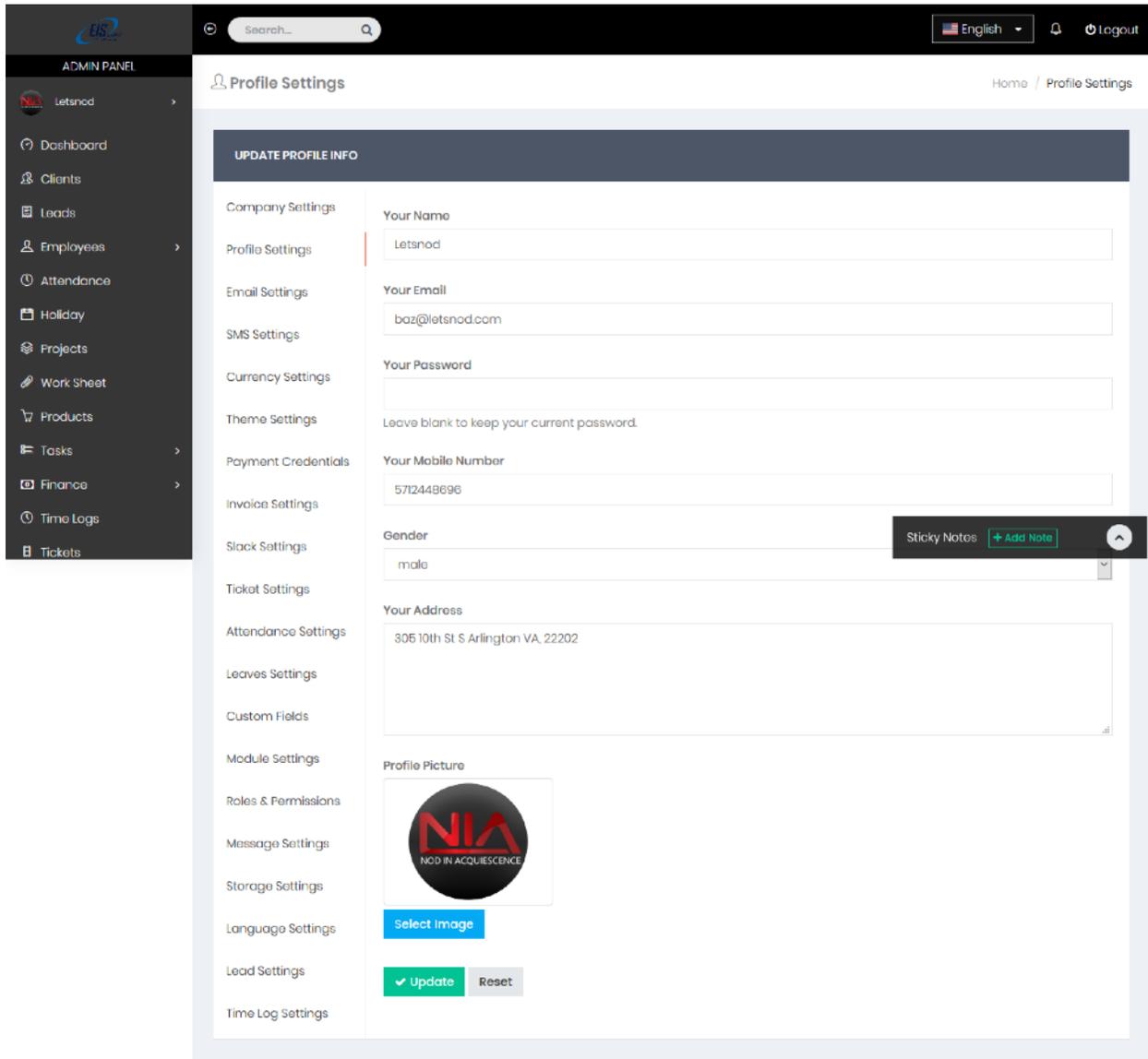
The 'Settings' panel contains 'Update Organization Settings' section. This section is divided into two columns.

The first column is the settings parameter field,



Screenshot showing settings parameter section

The second column entails the details section, this section appears when a user clicks on a certain 'parameter' field. On this section the user will key in important details relating to the parameter field selected in the tabs provided.



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Screenshot showing the 'Details' section under the 'Profile' parameter in the 'Settings' Panel

For instance in the panel above, the 'Profile Settings' is chosen in the parameter field. The second column which appears upon the user clicking on the parameter is where the user fills in the different details.

Upon completing the details, the user will click on the 'Update' tab located in the respective field. This will prompt the settings details to be updated successfully.

From here the user can click on the next parameter and key in the details. To effect the changes made the user must click on the 'Update' tab.

The 'Reset' tab allows the user to clear all the details in the field. This action allows the user to input a new set of data in the fields provided.

Notifications, language settings and Logging Out



Screenshot showing language, notification and logout tabs

The user can also change the language used in the EIS app, to do this the user will click on the language section. This tab is located on the top right section of the app. Here the user can select from the three set languages i.e. English, Spanish and French by simply clicking on the drop down arrow.

The notification panel is located on the extreme top right of the ESI app and is represented by a 'bell' symbol. This panel notifies the user of any new notification.

For purposes of user information security it is highly important to log out upon completing some tasks. To do this click on the 'Log Out' tab located on the extreme right corner of the ESI app.



Thank you for choosing our EIS app as your ultimate Business App. If you require any further assistance, please visit our online Support Centre (<http://letsnod.com>) or Contact Us at (+12025538641).