BIZ

myBIZ

Business Management Platform

User Manual

Complete Guide to Setup, Configuration & Daily Operations

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mypas.app/biz

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1. Introduction & Overview

myBIZ is a comprehensive, all-in-one business management platform designed for small and medium businesses. Built as an offline-first Progressive Web App (PWA), it works on any device with a browser and can be installed on your phone or desktop for native-like experience.

The platform consists of six integrated modules that cover the entire business lifecycle:

Module	Purpose
HR	Employee management, departments, attendance, leave, payroll, end of service
CRM	Contact management, lead capture, deal pipeline, quotations, tasks
ERP	Product catalog, inventory/stock, sales orders, purchase orders
Production	Bill of materials, work orders, material requirements planning (MRP)
Projects	Project management, task boards, time tracking, budget monitoring
Finance	Bank accounts, invoicing with PDF export, expenses, financial reports

Three Business Environments

myBIZ adapts to your business type through configurable environments. You can enable one, two, or all three:

- **Trading** - Buy and sell goods. Stock management, purchase orders, sales orders, delivery.
- **Manufacturing / MTO** - Produce finished goods from raw materials. BOM, work orders, production tracking.
- **Services** - Deliver services, projects, time-based billing. Service orders, milestones, consumables.

When multiple environments are enabled, each line item in a quotation or order can be tagged as Trading, MTO, or Service. A single quote can contain all three types, and when converted, it automatically creates the appropriate order type for each.

Key Features

- **Offline-first** - Works without internet. Data stored locally on your device.
- **Google Drive sync** - Backup and restore your data across devices.
- **Installable PWA** - Install on phone or desktop for native experience.
- **Multi-currency** - Every transaction supports foreign currency with exchange rates.
- **Configurable access** - Per-user permissions at module, feature, and action level with data scope control.
- **PDF invoices** - Professional invoices with your business logo and branding.

- **Region-agnostic** - No hardcoded tax or payroll rules. Everything configurable.

2. Getting Started

When you first open myBIZ, the setup wizard guides you through initial configuration in 8 steps.

Setup Wizard Steps

Step 1: Welcome

Choose to start fresh or import an existing backup file.

Step 2: Access Mode

Choose between **Single User** (one password, full access) or **Team Mode** (multiple user accounts with configurable permissions). You can upgrade from single to team later without losing data.

Step 3: Password

Set your master password (minimum 4 characters). This protects access to the platform.

Step 4: Security Question

Set a security question and answer for password recovery.

Step 5: Business Profile

Enter your company name, address, phone, email, tax ID, and select your base currency. These details appear on invoices and documents.

Step 6: Tax Configuration

Add your tax types (VAT, GST, etc.) with rates. These are used as defaults on invoices and quotations. You can add multiple tax types.

Step 7: Enable Modules

Toggle which modules you need: HR, CRM, ERP, Production, Projects, Finance. HR is enabled by default. Enable more anytime from Configuration.

Step 8: Business Environment

If CRM or ERP is enabled, select your business environments: Trading, Manufacturing, Services. This controls which workflows and features are available.

> **Tip:** You can change all of these settings later from Configuration and Settings. Don't worry about getting everything perfect on first setup.

3. Dashboard

The dashboard is your business command center. It provides a real-time overview of all active modules with key metrics, charts, and alerts.

Alert Banner

Clickable alerts appear at the top when action is needed:

- Pending leave or overtime approvals (yellow)
- Pending expense approvals (yellow)
- Overdue invoices (red)
- Overdue tasks (red)
- Low stock or out of stock warnings (yellow/red)

Click any alert to jump directly to the relevant page.

Charts & Visualizations

- **Revenue vs Expenses** - 6-month trend line chart showing income and spending over time.
- **Invoice Status** - Doughnut chart showing distribution of Draft, Sent, Partial, Paid, and Overdue invoices.
- **Expense by Category** - Doughnut chart showing where money is being spent.
- **Pipeline by Stage** - Horizontal bar chart showing deal values at each pipeline stage.
- **Employees by Department** - Bar chart showing team distribution.

Access-Based Dashboard

The dashboard automatically adapts based on the logged-in user's permissions. Each section only appears if the user has access to that module. An HR-only user sees only HR metrics. A finance user sees financial charts. Super Admin sees everything.

4. HR Module

The HR module manages your entire employee lifecycle from hiring to end of service.

4.1 Employees

The employee directory is the foundation of HR. Each employee record includes:

- Personal details: first name, last name, email (validated), phone (with country code)
- Job details: title, employee ID, department, reports-to hierarchy
- Employment: contract type, salary category (monthly/hourly), date joined, status
- Photo upload and emergency contact

An **Investors** root node is automatically created at setup. The **CEO (Top Level)** option is always available in the Reports To dropdown for top-level employees.

Click any employee card to see their full profile: personal details, direct reports, leave history, and documents.

4.2 Departments

Create departments and assign a department manager. The employee count updates automatically as staff are assigned to departments.

4.3 Documents

Upload documents per employee with title and expiry date. The system tracks document validity with color-coded badges: Valid (green), Expiring Soon (yellow), Expired (red). Useful for visa, license, and certification tracking.

4.4 Attendance & Leave Calendar

The attendance view shows a date picker with who is on approved leave that day, plus public holidays. No clock-in/out required - it is a simplified calendar view.

4.5 Leave Management

Leave management uses a two-level approval workflow:

- **Level 1:** Employee submits leave request, goes to their direct manager.
- **Level 2:** Manager approves, request moves to HR for final approval.

Leave types and days per year are fully configurable from the Leave Policy settings. Public holidays can be defined in the calendar.

4.6 Overtime

Available only for hourly employees. Log overtime hours with description, submit for manager approval. Approved overtime automatically feeds into the payroll calculation.

4.7 Payroll

Payroll supports both monthly salaried and hourly employees:

- Configure salary components (allowances) and deductions in admin settings
- Set up per-employee salary structure (basic + allowances - deductions)
- Generate monthly pay runs that auto-include approved overtime for hourly staff
- View individual payslips
- Draft and finalize workflow to prevent accidental changes

4.8 End of Service (EOS)

Configure end-of-service calculation rules by year brackets (e.g., 21 days per year for first 5 years, 30 days after). The system calculates per-employee EOS breakdown showing daily rate, years of service, and total gratuity amount.

5. CRM Module

The CRM module manages your customer relationships from first contact through to quotation.

5.1 Contacts

A unified contact directory for all business relationships. Each contact has a type:

- **Customer** - People and companies you sell to
- **Supplier** - Vendors you purchase from (also used in product catalog and POs)
- **Partner** - Business partners and collaborators
- **Prospect** - Potential customers not yet converted

Click any contact to see their profile with linked deals, leads, and communication history.

> **Tip:** Suppliers are registered here as contacts with type 'Supplier'. When adding a product, you can select the supplier from this list or quick-add a new one directly from the product form.

5.2 Leads

Capture and track sales leads through a status pipeline:

New > Contacted > Qualified > Proposal > Won / Lost

Each lead tracks: title, linked contact, source (9 configurable sources), estimated value, priority, and assigned team member. Use the **Convert to Deal** button to move a qualified lead into the deals pipeline with one click.

5.3 Deals & Pipeline

Deals represent active sales opportunities. Two views are available:

- **Pipeline View** - Deals grouped by stage with totals per stage. One-click arrow button advances a deal to the next stage.
- **List View** - All deals in a flat list with full details.

Pipeline stages: Prospect > Qualified > Proposal > Negotiation > Won / Lost. Each deal tracks value, probability %, expected close date, and assigned salesperson.

5.4 Quotations

Quotations are the bridge between CRM and ERP. Create a quote from a deal or standalone:

- Add line items from the product catalog
- Each line item can be tagged by environment: **Trading, MTO, or Service**
- Tax %, discount, and currency with exchange rate
- Status flow: Draft > Sent > Accepted > Converted

The **Convert to Orders** button splits the quote into the appropriate order types:

- Trading items become a **Sales Order**

- MTO items become **Production Orders** (one per item)
- Service items become a **Service Order**

5.5 Tasks

CRM tasks track follow-ups: calls, emails, meetings, and to-dos. Link tasks to contacts and deals. Status: To Do > In Progress > Done. Click the circle to toggle completion. Overdue tasks are flagged in red.

6. ERP Module

6.1 Products & Services Catalog

The product catalog is shared across all modules. Each product has:

- **Auto part number** - Generated as PRD-YYYYMMDD-NNNNN (editable)
- **Type** - Goods, Raw Material, Finished Good, Service, or Consumable/Spare
- **Manufacturer info** - 'Manufactured by us' toggle. When off: manufacturer name, part number, and supplier link
- **Quick Add Supplier** - Add a new supplier without leaving the product form
- Cost price, sell price, unit, category, taxable flag

6.2 Stock Management

Live stock quantities for all non-service products. Low stock (below 5) shows yellow, out of stock shows red. Manual stock adjustments with reason tracking. Stock automatically updates when:

- PO is received (stock in)
- Production order starts (raw materials consumed)
- Production order completes (finished goods added)
- Service order uses consumables (stock deducted)

6.3 Sales Orders

Sales orders can be created two ways:

- **From quotation** - Trading items in a converted quote automatically become an SO
- **Direct creation** - Use the 'New SO' button to create standalone

Each SO supports: customer selection, line items from catalog, currency with exchange rate, and project linking (create new or link existing).

Status flow: Confirmed > Shipped > Delivered. The **Create PO** button on a confirmed SO creates a purchase order against that order with items pre-filled.

6.4 Purchase Orders

Two types of POs:

- **Stock PO** - Created directly for inventory replenishment
- **Against Order PO** - Created from a Sales Order or Service Order. Items pre-filled from the source order.

Each PO supports: supplier selection, currency with exchange rate, project linking. The **Receive to Stock** button automatically adds quantities to inventory.

6.5 Service Orders

Created from quotation conversion (service items) or manually. Service orders track:

- Service items with values
- **Consumables/Spares** - Two options: 'From Stock' (deducts from inventory) or 'Order Parts' (creates a draft PO)
- Total service value plus consumable costs tracked separately

7. Production Module

7.1 Bill of Materials (BOM)

A BOM defines the recipe for producing a finished good. Select the finished product, specify the output quantity, and add raw materials with their required quantities. Example: To make 1 Widget, you need 3 Steel Plates + 2 Screws + 1 Motor.

7.2 Work Orders

Work orders are BOM-aware production orders. When a work order exists for a product with a BOM:

- Material requirements are displayed with stock check (need vs have)
- Shortage warnings show when stock is insufficient
- **Start** button consumes raw materials from inventory
- **Complete** button adds finished goods to stock

Status: Planned > In Progress > Completed

7.3 MRP (Material Requirements Planning)

MRP automatically analyzes all open work orders, calculates total raw material demand from BOMs, and compares against current stock levels. The result shows:

- Total materials needed across all production
- Current stock levels
- Shortages with one-click **Create PO** button for each

Tip: Run MRP regularly before starting production to ensure you have all materials. The suggested POs are created as drafts - go to Purchase Orders to set suppliers and prices.

8. Projects Module

The Projects module is cross-functional - any business type can use it for tracking deliveries, implementations, or internal initiatives.

8.1 Projects

Each project includes: title, client link, project manager, start/end dates, budget, status, description, and milestones. Milestones are checkable items with due dates.

The project detail view shows a complete picture:

- **Budget** - Planned budget from project setup
- **Revenue** - From linked Sales Orders (green)
- **Costs** - From linked Purchase Orders (red)
- **Hours** - From time tracking entries
- **Milestones** - Completion progress
- **Tasks** - Linked project tasks

Projects can be auto-created from Sales Orders using the 'Create new project' option when creating an SO.

8.2 Project Tasks

Tasks linked to specific projects with a richer status flow: To Do > In Progress > Review > Done. Each task has priority (Low/Medium/High/Urgent), assignment, and due date. Overdue tracking with visual indicators.

8.3 Time Tracking

Log hours against active projects. Each entry records: project, date, hours, and description. Running totals feed into the project detail view for budget vs actual analysis.

9. Finance Module

9.1 Accounts

Set up your financial accounts before creating invoices.

Bank Accounts

Add multiple bank accounts with: account name, bank name, account number, IBAN, branch, and opening balance. Each bank shows a live balance calculated from all transactions.

Employee Funds (Petty Cash)

Employees automatically appear in the accounts tab when they handle funds. The petty cash cycle works as follows:

- Company gives employee cash (payment received by employee) - balance goes UP (owes company)
- Employee pays a business expense - balance goes DOWN
- Employee deposits remainder to bank - balance returns to zero (settled)

Fund Transfers

- **Employee to Bank** - Deposit petty cash. Completes immediately.
- **Employee to Employee** - Transfer stays **Pending** until the receiving employee accepts. They see an alert to Accept or Reject.

9.2 Invoices

Create invoices manually or from orders. Each invoice includes:

- Auto-incrementing invoice number (INV-0001, INV-0002...)
- Customer, dates, line items from product catalog
- Tax %, discount, currency with exchange rate
- Project linking for cost tracking

Status flow: Draft > Sent > Partial > Paid / Overdue

Recording Payments: Click the payment button on any unpaid invoice. Select the receiving account (bank or employee), enter amount, date, method, and reference. Supports partial payments - status auto-updates based on balance.

PDF Export: Click the PDF button to generate a professional invoice with your business logo, company details, line items, totals, payment status, and company footer.

9.3 Expenses

Track business expenses with 16 categories. Key features:

- **SO Linking** - Link an expense to a Sales Order to track it against that order. Unlinked expenses are classified as SG&A; (Selling, General & Administrative).

- **Project Linking** - Link to a project for project cost tracking.
- **Manager Approval** - All expenses require approval. The creator cannot approve their own expense. For SG&A; expenses, the creator's direct manager approves. For project-linked expenses, the project manager approves.

Filter by: SG&A;, SO Linked, Project, category, and approval status (Pending/Approved/Rejected).

9.4 Financial Reports

Monthly financial overview with:

- P&L; Summary - Revenue (collected), expenses, and profit
- Revenue by Customer - Top customers with percentage breakdown
- Expense by Category - Where money is being spent
- Receivables Aging - Unpaid invoices with days overdue

10. User Management & Access Control

myBIZ uses a fully configurable permission system instead of fixed roles. Each user gets individually configured access.

Creating User Accounts

Go to Users & Access (Super Admin only). Click 'Add User':

- Link to an employee from the HR directory
- Set display name, username, and password
- Configure access permissions (see below)

Three-Layer Permission System

Layer 1: Module Access

Toggle which modules the user can access: HR, CRM, ERP, Production, Projects, Finance. Disabled modules are completely hidden from the sidebar.

Layer 2: Feature Access & Actions

Within each enabled module, configure per-feature permissions:

- **View** - Can see the feature and its data
- **Create** - Can add new records
- **Edit** - Can modify existing records
- **Delete** - Can remove records
- **Approve** - Can approve leave, overtime, expenses

Layer 3: Data Scope

- **Full** - User sees ALL records in that feature
- **Individual** - User sees ONLY records they created, are assigned to, or manage

Quick Presets

- **Full** - All modules, all actions, full scope
- **View Only** - All modules, view only, no create/edit/delete
- **Own Only** - All modules, view+create+edit, individual scope
- **HR Only** - HR module full access only
- **None** - Everything off

Password Reset

Super Admin can reset any user's password by clicking the lock icon on their user card. No need to open the full edit form.

Note: Super Admin always has full access to everything and cannot be modified or deleted. System pages (Configuration, Users & Access, Settings) are only visible to Super Admin.

11. Settings & Configuration

Configuration (Admin Only)

The Configuration panel lets you:

- Enable/disable modules and individual features
- Configure tax rules (add/edit/remove tax types and rates)
- Configure business environments (Trading, Manufacturing, Services)
- Set up PWA quick actions

Business Profile

In Settings, configure your business profile:

- **Logo upload** - Used on invoices, quotes, and PDF documents
- Business name, address, phone (with country code), email (validated)
- Tax ID and base currency

Data Sync & Backup

- **Backup to Google Drive** - Uploads your data to Google Drive's app folder
- **Restore from Google Drive** - Downloads and restores from backup
- **Export JSON** - Download your data as a JSON file
- **Save/Load File** - Direct file save/load (desktop browsers)

> **Tip:** Back up regularly! Use Google Drive sync for cross-device access, or JSON export for local backup.

12. Tips & Best Practices

Workflow Best Practices

- Set up bank accounts first (Finance > Accounts) before creating invoices
- Register suppliers as contacts (CRM > Contacts, type: Supplier) before adding products
- Create your product catalog (ERP > Products) before creating quotations or orders
- Define BOMs (Production > BOM) before starting production orders
- Link Sales Orders to projects for full financial tracking

The Complete Business Workflow

The ideal flow through myBIZ follows this path:

CRM Contact > Lead > Deal > Quotation > Convert to Orders > Sales Order / Production Order / Service Order > Project (optional) > Invoice > Payment > Financial Reports

Each step connects to the next. A CRM deal becomes a quote, which becomes orders, which become invoices, which become revenue in your financial reports.

Multi-Currency Handling

Every transaction form (invoices, expenses, SOs, POs, quotations, payments) includes a currency selector. When you choose a currency different from your system currency, an exchange rate field appears. Enter the conversion rate and the system calculates the equivalent in your base currency.

Phone & Email Validation

All phone fields include a country code dropdown with search (40+ countries with flags). All email fields validate format in real-time - the field shows a red border and error message if the format is invalid.

PDF Documents

All generated PDFs include:

- Your business logo (upload in Settings > Business Profile)
- Full company header with name, address, phone, email, tax ID
- Professional layout with status badges and formatted totals
- Company footer with full address
- myBIZ branding

Installing as PWA

On Android Chrome, tap the menu (three dots) and select 'Install app' or 'Add to home screen'. On desktop Chrome, click the install icon in the address bar. The PWA runs offline and shows a quick-action grid for common tasks.

Thank you for using myBIZ!

For support and updates: mypas.app/biz