BIZ

myBIZ

Business Management Platform

Detailed User Manual

Step-by-Step Guide with Field Descriptions

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Chapter 1: Introduction

myBIZ is a complete business management platform built as a single-file Progressive Web App. It runs entirely in your browser with data stored locally on your device. This manual covers every feature, every field, and every action available in the platform.

Platform Architecture

The platform is organized into six modules, each covering a major business function. Modules can be enabled or disabled based on your needs. Within each module, individual features can also be toggled on or off.

Module	Features	Key Capabilities
HR (8 features)	Employees, Departments, Documents, Attendance, Leave, Overtime, Payroll, End of Service	Employee lifecycle management, 2-level leave approval, payroll with overtime integration
CRM (5 features)	Contacts, Leads, Deals, Quotations, Tasks	Customer pipeline management, environment-tagged quotations, auto order conversion
ERP (5 features)	Products, Stock, Sales Orders, Purchase Orders, Service Orders	Multi-environment order management, 2 PO types (stock + against order), consumable tracking
Production (3)	BOM, Work Orders, MRP	Material-aware production, stock consumption/addition, shortage analysis
Projects (4)	Projects, Tasks, Time Tracking, Budget	Milestone tracking, linked SOs/POs for financials, hours logging
Finance (4)	Accounts, Invoices, Expenses, Reports	Multi-account banking, petty cash, PDF invoices, approval workflows

Three Business Environments

During setup, you select which business environments apply to your company. This controls which ERP workflows are available:

Environment	What It Covers	Workflow
Trading	Buy and sell goods	Deal > Quote > SO > Ship > Invoice
Manufacturing / MTO	Produce finished goods from raw materials	Deal > Quote > Production Order (consume materials > produce finished goods) > SO > Invoice

Services	Deliver services, projects, time-based billing	Deal > Quote > Service Order (+ consumables from stock or ordered parts) > Invoice

Tip: You can enable any combination of environments. With multiple environments active, each line item in a quotation gets tagged as Trading, MTO, or Service. When converted, the system automatically creates the right order type for each.

Chapter 2: Setup Wizard - Step by Step

When you first open myBIZ, the setup wizard walks you through 8 steps. Each step is detailed below with every field explained.

Step 1: Welcome Screen

The landing page shows the myBIZ logo with two options.

Field	Type	Description
Get Started	Button	Begins the setup wizard from scratch
Import Backup	Button	Load an existing backup JSON file to restore previous data

Step 2: Access Mode

Choose how the platform will be accessed.

Field	Type	Description
Single User	Radio	One password for everything. Best for sole proprietors. Full access.
Team Mode	Radio	Multiple user accounts with individual permissions. Creates a Super Admin ac

Step 3: Master Password

Set the password that protects the platform.

Field	Type	Description
Password	Text (masked)	Minimum 4 characters. This becomes the Super Admin password in team mo
Confirm Password	Text (masked)	Must match the password above.

Step 4: Security Question

For password recovery.

Field	Type	Description
Security Question	Text	A question only you can answer (e.g., 'Mother\'s maiden name')
Answer	Text	The answer to your security question. Case-sensitive.

Step 5: Business Profile

Your company information. Used on invoices, PDF documents, and reports.

Field	Type	Description
Business Name	Text	Your company or trade name
Address	Text	Full business address (appears on invoices and PDF footer)
Phone	Phone+Country	Business phone with country code selector (40+ countries)
Email	Email (validated)	Business email - format validated for @ and domain
Tax ID	Text	VAT number, GST number, or equivalent tax registration
Currency	Dropdown+Search	Base currency for the platform (e.g., AED, USD, INR). All amounts default to

Step 6: Modules

Enable the modules you need. Toggle any combination.

Field	Type	Description
HR	Checkbox	Employee management, payroll, leave (enabled by default)
CRM	Checkbox	Customer relationship management, pipeline, quotations
ERP	Checkbox	Products, inventory, sales/purchase orders
Production	Checkbox	Bill of materials, work orders, MRP
Projects	Checkbox	Project management, tasks, time tracking
Finance	Checkbox	Invoicing, expenses, bank accounts, reports

Step 7: Business Environments

Shown only if CRM or ERP is enabled.

Field	Type	Description
Trading	Checkbox	Buy and sell goods. Enables stock management, SOs, delivery.
Manufacturing / MTO	Checkbox	Make to order. Enables BOM, work orders, production tracking.
Services	Checkbox	Service delivery. Enables service orders, milestones, consumables.

Important: All settings can be changed later. Modules and environments can be enabled/disabled anytime from Configuration (Super Admin only).

Chapter 3: Navigation & Layout

Screen Layout

The myBIZ interface consists of three main areas:

Area	Location	Purpose
Sidebar	Left panel	Module navigation, feature links, system menu. Collapsible on mobile.
Top Bar	Top of content area	Current page title, hamburger menu (mobile)
Content Area	Center/right	The active page content - forms, lists, charts, etc.

Sidebar Structure

The sidebar is organized by module. Each module section shows only the features that are enabled AND that the current user has permission to access.

- **Dashboard** - Always at the top. Your business overview.
- **Module sections** - HR, CRM, ERP, Production, Projects, Finance (in workflow order)
- **System section** - Configuration, Users & Access, Settings (Super Admin only)

Common UI Elements

Element	Appearance	How to Use
Search Bar	Text input at top of lists	Type to filter records by name, number, or description
Tabs	Row of buttons below search	Click to filter by status, type, or category
Cards	Dark rectangles in lists	Click to view details. Buttons on right for edit/delete.
Modals	Popup forms	Fill fields and click Save. Close via X or Cancel. Click outside does NOT close.
Stat boxes	Small metric cards	Shows key numbers. Some are clickable.
Badge	Small colored label	Shows status (Pending, Approved, etc.) with color coding
Phone Input	Country flag + code + number	Click flag to search countries. Number field auto-formats.
Email Input	Text with validation	Red border appears if format is invalid (missing @ or domain)
Currency Amount	Currency button + amount	Click currency to change. Exchange rate appears for foreign currency.

Chapter 4: Dashboard

The dashboard shows a comprehensive overview of your business. It is access-aware - each user sees only the sections for modules they have permission to access.

Alert Banner

Colored alert buttons appear at the top when action is needed. Each alert is clickable and navigates to the relevant page.

Alert	Color	Trigger
Pending leave requests	Yellow	Leave requests awaiting approval
Pending overtime	Yellow	Overtime entries awaiting approval
Pending expenses	Yellow	Expenses awaiting manager approval
Overdue invoices	Red	Invoices past their due date
Overdue tasks	Red	Tasks past their due date
Low stock	Yellow	Products with stock between 1-4 units
Out of stock	Red	Products with zero stock

Charts

Chart	Type	Data Shown
Revenue vs Expenses	Line chart	6-month trend of collected revenue and approved expenses
Invoice Status	Doughnut	Distribution: Draft, Sent, Partial, Paid, Overdue
Expense by Category	Doughnut	Top 6 expense categories by amount
Pipeline by Stage	Horizontal bar	Deal values at each pipeline stage
Employees by Department	Vertical bar	Staff count per department

Quick Actions Grid

A 3-column grid of shortcut buttons for common actions. Shows up to 9 buttons based on enabled modules. Click any button to navigate directly to that feature.

Chapter 5: HR Module - Complete Guide

5.1 Employees

Navigating to Employees

Sidebar > HR > Employees. Shows all employees as cards with photo, name, title, and status.

Adding a New Employee

Step 1: Click the 'Add' button (top right)

Step 2: Fill in the employee form fields:

Field	Required	Description
First Name	Yes	Employee first/given name
Last Name	Yes	Employee surname/family name
Email	Yes*	Email with format validation. *Not required for Investor nodes.
Phone	Yes*	Phone with country code dropdown (40+ countries with flags)
Job Title	Yes	Position title (e.g., Sales Manager, Accountant)
Employee ID	No	Custom ID (e.g., EMP-001). Optional.
Reports To	Yes	Select direct manager from dropdown. Options include all employees plus "CEO (Top Level)" for top executives.
Department	No	Assign to a department (must create departments first)
Date Joined	Yes	Employment start date
Contract Type	Yes	Full-time, Part-time, Contract, or Intern
Salary Category	Yes	Monthly (salaried) or Hourly. Affects payroll and overtime.
Status	Auto	Active by default. Can be set to Inactive or Terminated.
Photo	No	Upload employee photo (click the camera icon)
Address	No	Home address
Emergency Contact	No	Name of emergency contact person
Emergency Phone	No	Phone with country code for emergency contact
Notes	No	Any additional notes about the employee

Step 3: Click 'Save Employee'

Viewing an Employee Profile

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

Tip: The 'Investors' root node is automatically created at setup. It serves as the top-level entity in the reporting hierarchy. You cannot delete it.

5.2 Departments

Sidebar > HR > Departments.

Step 1: Click 'Add' to create a department

Field	Required	Description
Department Name	Yes	Name of the department (e.g., Sales, Engineering, Finance)
Manager	No	Select department head from employee list
Description	No	Brief description of the department

The employee count for each department updates automatically as employees are assigned.

5.3 Documents

Sidebar > HR > Documents. Upload and track employee documents with expiry dates.

Step 1: Click 'Add' on any employee

Field	Required	Description
Employee	Yes	Select which employee this document belongs to
Document Title	Yes	Name/type (e.g., Passport, Visa, Driver License, Certificate)
Expiry Date	No	When the document expires. System shows color-coded status: Green = Valid, Yellow = Expiring within 30 days, Red = Expired
File Upload	No	Upload the actual document file (PDF, image, etc.)

5.4 Leave Management

Submitting a Leave Request

Step 1: Navigate to Sidebar > HR > Leave

Step 2: Click 'Apply Leave'

Field	Required	Description
Employee	Yes	Auto-selected if submitting own leave. Manager can submit for team.
Leave Type	Yes	Select from configured types (Annual, Sick, etc.)
Start Date	Yes	First day of leave
End Date	Yes	Last day of leave
Reason	No	Explanation for the leave request

Step 3: Submit. Status becomes 'Pending'

Approval Workflow

Pending >	Manager Approved >	HR Approved

- **Level 1:** Direct manager sees the request and clicks Approve or Reject
- **Level 2:** After manager approval, HR admin gives final approval

Configuring Leave Policy

Access from the Leave page > 'Leave Policy' button. Configure:

- Leave types (Annual, Sick, Casual, Maternity, etc.) with days per year
- Public holidays with dates

5.5 Overtime

Available only for employees with salary category set to 'Hourly'. Sidebar > HR > Overtime.

Field	Required	Description
Employee	Yes	Only hourly employees appear in the dropdown
Date	Yes	Date the overtime was worked
Hours	Yes	Number of overtime hours (e.g., 2.5)
Description	No	What work was performed

Status: Pending > Manager Approved. Approved overtime automatically appears in the next payroll run for the employee.

5.6 Payroll

Setting Up Salary

Step 1: Navigate to Payroll

Step 2: Click 'Setup' on an employee

For monthly employees: set basic salary, add allowances (Housing, Transport, etc.), add deductions. For hourly employees: set hourly rate.

Running Payroll

Step 1: Select the month

Step 2: Click 'Generate Pay Run'

Step 3: Review calculations (approved overtime auto-included for hourly staff)

Step 4: Click 'Finalize' to lock the pay run

> **Important:** Once a pay run is finalized, it cannot be edited. Review carefully before finalizing.

5.7 End of Service (EOS/Gratuity)

Configure EOS rules in the admin settings. Rules are set by year brackets:

- Example: First 5 years = 21 days per year, After 5 years = 30 days per year

The system calculates per-employee: daily rate, years of service, applicable bracket, and total EOS amount.

Chapter 6: CRM Module - Complete Guide

6.1 Contacts

Sidebar > CRM > Contacts. The unified directory for all business relationships.

Adding a Contact

Field	Required	Description
First Name	Yes	Contact first name
Last Name	No	Contact last name
Company	No	Company or organization name
Type	Yes	Customer, Supplier, Partner, or Prospect
Email	No	Email address (format validated)
Phone	No	Phone with country code selector
Website	No	Company website URL
Tags	No	Comma-separated tags for categorization
Address	No	Full address
Notes	No	Any additional information

Tip: Register your suppliers here with type 'Supplier'. They become available in the product catalog and purchase order forms.

6.2 Leads

Lead Status Flow

New >	Contacted >	Qualified >	Proposal >	Won / Lost

Field	Required	Description
Lead Title	Yes	Descriptive name (e.g., "Website redesign for Acme Corp")
Contact	No	Link to an existing contact
Source	No	Where the lead came from: Website, Referral, Cold Call, Social Media, Advertisement, Trade Show, Email Campaign, Walk-in, Other
Estimated Value	No	Expected deal value
Status	Yes	Current stage in the pipeline
Assigned To	No	Team member responsible for this lead
Priority	Yes	Low, Medium, High, or Urgent

Notes	No	Additional details

Converting a Lead to Deal

On any lead card (not Won/Lost), click the green 'Deal' button. This:

- Creates a new deal in the Deals pipeline with the lead details
- Sets the lead status to 'Won'
- Links the deal to the same contact

6.3 Deals & Pipeline

Pipeline Stages

Prospect >	Qualified >	Proposal >	Negotiation >	Won/Lost

Field	Required	Description
Deal Title	Yes	Name of the opportunity
Contact	No	Customer contact
Value	No	Expected deal value in currency
Stage	Yes	Current pipeline stage
Probability %	No	Likelihood of closing (used for weighted pipeline)
Expected Close	No	Target closing date
Assigned To	No	Salesperson responsible
Notes	No	Deal notes and context

Pipeline View vs List View

- **Pipeline**: Deals grouped by stage with totals. Arrow button advances to next stage.
- **List**: All deals in a flat list sorted by date.

Pipeline metrics at the top: Total Pipeline Value, Weighted Value (value x probability), Won Count.

6.4 Quotations - The CRM to ERP Bridge

Quotations are the key document that connects CRM deals to ERP orders.

Creating a Quotation

Field	Required	Description
Quote Title	Yes	Descriptive name for the quotation
Contact	No	Customer receiving the quote
From Deal	No	Link to the originating CRM deal
Date	Yes	Quote date

Valid Until	No	Expiry date for the quote
Currency	Yes	Quote currency (exchange rate if foreign)
Line Items	Yes	Products/services with quantities and prices
Tax %	No	Tax rate applied to subtotal
Discount	No	Flat discount amount
Notes	No	Terms, conditions, or additional notes

Environment Tagging (Multi-Environment)

When multiple environments are enabled, each line item shows environment toggle buttons:

- **Trading** (blue) - Physical goods bought and resold
- **MTO** (orange) - Items to be manufactured/produced
- **Service** (purple) - Service deliverables

Selecting a product auto-sets the environment based on product type. You can override manually.

Converting a Quotation to Orders

When a quote is Accepted, click 'Convert to Orders'. The system automatically:

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

Quote Status Flow

Draft >	**Sent >**	**Accepted >**	**Converted**

Chapter 7: ERP Module - Complete Guide

7.1 Products & Services Catalog

Field	Required	Description
Product Name	Yes	Name of the product or service
Part Number/SKU	Auto	Auto-generated as PRD-YYYYMMDD-NNNNN. Editable.
Type	Yes	Goods (Trading), Raw Material, Finished Good, Service, or Consumable/Spare
Category	No	Product category (e.g., Electronics, Hardware)
Unit	Yes	Unit of measure: pcs, kg, ltr, m, hr, box, set, lot
Cost Price	No	Purchase/manufacturing cost
Sell Price	No	Selling price to customers
Manufactured by Us	No	Checkbox. When checked, hides manufacturer fields below.
Manufacturer Name	No	OEM/brand name (shown when "Manufactured by Us" is unchecked)
Manufacturer Part No.	No	Manufacturer reference number
Supplier	No	Select from contacts with type Supplier. "New Supplier" button for quick-add without leaving the form.
Description	No	Detailed product description
Taxable	Yes	Whether tax applies to this product
Active	Yes	Active products appear in dropdowns. Inactive are hidden.

7.2 Stock Management

Shows live stock quantities for all non-service, active products. Color coding:

- **Green** - Adequate stock (5+ units)
- **Yellow** - Low stock (1-4 units)
- **Red** - Out of stock (0 units)

Manual Stock Adjustment

Step 1: Click 'Adjust' on any product

Step 2: Enter quantity: positive to add (e.g., +10), negative to deduct (e.g., -5)

Step 3: Enter reason (optional but recommended for audit trail)

Step 4: Click 'Adjust'

Automatic Stock Updates

Action	Stock Effect	Trigger

PO Received	Stock increases	Click "Receive to Stock" on a PO
Production Started	Raw materials decrease	Click "Start" on a work order
Production Completed	Finished goods increase	Click "Complete" on a work order
Service Consumable Used	Stock decreases	Add consumable "From Stock" on service order

7.3 Sales Orders

Two Ways to Create a Sales Order

- **From Quote Conversion**: Trading items in a converted quotation automatically become an SO
- **Direct Creation**: Click 'New SO' button for standalone orders

Field	Required	Description
Customer	Yes	Select from contacts (Customer/Prospect type)
Date	Yes	Order date
Currency	Yes	Order currency with exchange rate if foreign
Line Items	Yes	Products from catalog with qty and price
Project Linking	No	Three options: No project, Link existing, or Create new. "Create new" auto-creates a project from SO details.
Notes	No	Order notes or special instructions

Sales Order Actions

Confirmed > Shipped > Delivered

- **Create PO** - Creates a purchase order against this SO (items pre-filled)
- **Ship** - Mark as shipped
- **Delivered** - Mark as delivered

7.4 Purchase Orders

Two Types of Purchase Orders

PO Type	Created From	Purpose
Stock PO	PO page > "Stock PO"	Direct inventory replenishment. You select supplier, add items, set prices.
Against Order PO	SO page > "Create PO" or Service Order > "Order Parts"	Procurement for a specific customer order. Items pre-filled from source order. Just add supplier and cost prices.

Field	Required	Description
Supplier	Yes	Select from contacts with type Supplier

Date	Yes	PO date
Currency	Yes	PO currency with exchange rate if foreign
Project	No	Link to a project for cost tracking
Line Items	Yes	Products with quantities and cost prices
Notes	No	PO notes or special instructions

Receiving a PO

Click 'Receive to Stock' on a Sent PO. This automatically adds all item quantities to inventory.

Draft >	Sent >	Received

Chapter 8: Production Module

8.1 Bill of Materials (BOM)

A BOM defines the recipe for producing a finished good.

Field	Required	Description
Finished Product	Yes	Select from products with type "Finished Good"
Output Quantity	Yes	How many units this recipe produces (default: 1)
Raw Materials	Yes	Add materials with quantities needed per output. Select from products with type "Raw Material" or "Consumable"
Notes	No	Production notes or instructions

Tip: Example BOM: To make 1 Widget, you need 3 Steel Plates + 2 Screws + 1 Motor. The BOM stores this recipe so work orders can calculate material requirements.

8.2 Work Orders

Work orders are BOM-aware. When linked to a product with a BOM:

- Material requirements shown with stock check (Need vs Have)
- Shortage warnings when stock is insufficient

Work Order Actions

Planned >	In Progress >	Completed

- **Start (consume materials)** - Deducts raw materials from inventory based on BOM
- **Complete > Stock** - Adds finished goods to inventory

8.3 MRP (Material Requirements Planning)

MRP analyzes all open work orders and calculates total material demand:

Step 1: System scans all Planned and In Progress work orders

Step 2: Calculates raw material needs from BOMs (multiplied by order quantity)

Step 3: Compares against current stock levels

Step 4: Shows shortages with one-click 'Create PO' button

The created POs are drafts - go to Purchase Orders to set suppliers and prices.

Chapter 9: Projects Module

9.1 Creating a Project

Field	Required	Description
Project Title	Yes	Name of the project
Client	No	Link to a customer contact
Project Manager	No	Employee responsible for delivery
Start Date	No	Project kick-off date
End Date	No	Target completion date
Budget	No	Planned budget amount
Status	Yes	Planning, Active, On Hold, Completed, Cancelled
Description	No	Project scope and details
Milestones	No	Add checkable milestones with due dates (default: Kickoff + Delivery)

Project Detail View

Click any project to see the complete picture:

- **Budget** - Planned budget from project setup
- **Revenue (SOs)** - Total from linked Sales Orders (green)
- **Costs (POs)** - Total from linked Purchase Orders (red)
- **Hours** - Total from time tracking entries
- **Milestones** - Completion status with checkmarks
- **Tasks** - Linked project tasks with status

9.2 Project Tasks

To Do >	In Progress >	Review >	Done

Tasks are linked to specific projects. Each has priority, assignment, and due date. Click the circle to toggle done. Overdue tasks show a red indicator.

9.3 Time Tracking

Field	Required	Description
Project	Yes	Select from active/planning projects
Date	Yes	Date the work was performed
Hours	Yes	Number of hours (e.g., 2.5)

Description	No	What work was done

Chapter 10: Finance Module - Complete Guide

10.1 Bank Accounts

Set up your bank accounts first. Navigate: Sidebar > Finance > Accounts.

Field	Required	Description
Account Name	Yes	Friendly name (e.g., "Main Operating Account")
Bank Name	No	Name of the bank
Account Number	No	Bank account number (last 4 digits shown on cards)
IBAN	No	International Bank Account Number
Branch	No	Branch name or code
Opening Balance	No	Starting balance when adding the account

10.2 Employee Funds (Petty Cash)

Employees automatically appear in the Accounts tab when they handle funds. The complete petty cash cycle:

Action	Balance Effect	Example
Employee receives cash (payment received by employee)	Balance UP (owes company)	Company gives Ahmed AED 5,000 for petty cash. Balance: 5,000 (owes).
Employee pays expense	Balance DOWN	Ahmed pays AED 1,200 for taxi. Balance: 3,800 (owes).
Employee deposits to bank	Balance DOWN (toward settled)	Ahmed deposits AED 3,800 to company bank. Balance: 0 (settled).

10.3 Fund Transfers

Click 'Transfer' button in Accounts. Two types:

- **Employee to Bank** - Deposit petty cash. Completes immediately.
- **Employee to Employee** - Transfer stays Pending until receiving employee Accepts. They see an alert banner with Accept/Reject buttons.

10.4 Invoices

Creating an Invoice

Field	Required	Description
Invoice #	Auto	Auto-incrementing (INV-0001). Editable.

Status	Yes	Draft, Sent, Partial, Paid, Overdue, Cancelled
Customer	Yes	Select from contacts (Customer/Prospect)
Date	Yes	Invoice date
Due Date	Yes	Payment due date (default: 30 days from date)
Currency	Yes	Invoice currency. Exchange rate required if foreign.
Line Items	Yes	Products/services from catalog with qty and price
Tax %	No	Tax rate applied to subtotal
Discount	No	Flat discount amount
Project	No	Link to a project for financial tracking
Notes	No	Payment terms, bank details, or instructions

Invoice Status Flow

Draft >	Sent >	Partial >	Paid

Recording a Payment

Step 1: Click the green 'Payment' button on any Sent/Partial/Overdue invoice

Step 2: Fill the payment form:

Field	Required	Description
Payment Amount	Yes	Amount received. Can be partial.
Currency	Yes	Payment currency (can differ from invoice currency). Exchange rate required if different.
Received Into	Yes	Select bank account or employee (for cash collection). Employee selection creates a fund entry (they owe company).
Date	Yes	Date payment was received
Method	Yes	Bank Transfer, Cash, Card, Cheque, Online, Other
Reference	No	Cheque number, transaction ID, or reference

Step 3: Click 'Record Payment'. Status auto-updates to Partial or Paid.

PDF Export

Click the 'PDF' button on any invoice. The generated PDF includes:

- Business logo (upload in Settings) and company header
- Invoice details, line items, totals with tax and discount
- Payment status and balance (if partially paid)
- Company footer with full address and contact details
- myBIZ branding

10.5 Expenses

Adding an Expense

Field	Required	Description
Description	Yes	What the expense is for
Amount	Yes	Expense amount with currency selector. Exchange rate for foreign currency.
Category	Yes	16 categories: Rent, Utilities, Supplies, Travel, Transport, Food, Marketing, Salary, Insurance, Maintenance, Equipment, Software, Communication, Professional Fees, Taxes, Other
Date	Yes	Date of the expense
Supplier	No	Select supplier from contacts
Link to Sales Order	No	Link to a specific SO = cost tracked against that order. Not linked = classified as SG&A.
Project	No	Link to a project for project cost tracking
Notes	No	Receipt details, explanation

Expense Approval Workflow

All manually entered expenses require manager approval. Rules:

- **Creator cannot approve their own expense** - prevents fraud
- **SG&A; expenses** - Creator's direct manager approves
- **Project-linked expenses** - Project manager approves
- **Super Admin** - Can always approve as fallback

Each pending expense shows 'Awaiting approval from: [Manager Name]' so everyone knows who needs to act.

Expense Filters

- **By allocation**: All | SG&A; | SO Linked | Project
- **By status**: All Status | Pending | Approved | Rejected

10.6 Financial Reports

Navigate: Sidebar > Finance > Reports. Select a month using the month picker.

Report Section	What It Shows
P&L Summary	Revenue (collected payments), Expenses (approved), and Profit for the selected month
Invoiced vs Outstanding	Total billed amount vs unpaid balance
Revenue by Customer	Top customers ranked by invoice total with percentage bars

Expense by Category	Category breakdown with percentage bars
Receivables Aging	All unpaid invoices sorted by due date with days overdue in red

Chapter 11: User Management & Permissions

Navigate: Sidebar > System > Users & Access (Super Admin only).

Creating a User Account

Step 1: Click 'Add User'

Step 2: Link to an employee from the HR directory

Step 3: Set display name, username, and password

Step 4: Configure access permissions (see below)

Three-Layer Permission System

Layer	What It Controls	Options
Layer 1: Module Access	Which modules appear in the sidebar	Toggle each module on/off: HR, CRM, ERP, Production, Projects, Finance
Layer 2: Feature Actions	What the user can do within each feature	Per-feature toggles: View, Create, Edit, Delete, Approve
Layer 3: Data Scope	Which records the user can see	Full = all records Individual = only own records (created by, assigned to, or managed by user)

Quick Presets

Preset	Modules	Actions	Scope
Full	All enabled	All actions	Full (all records)
View Only	All enabled	View only	Full (all records)
Own Only	All enabled	View, Create, Edit	Individual (own records)
HR Only	HR only	View, Create, Edit	Full
None	None	None	N/A

Password Reset

Click the orange lock icon on any user card to quickly reset their password without opening the full edit form.

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

Chapter 12: Settings & Configuration

Business Profile (Settings)

Setting	Description
Logo Upload	Upload your company logo. Used on PDF invoices and documents. Supports JPG, PNG. Click "Upload Logo" or "Remove" to clear.
Business Name	Company name shown on invoices and reports
Address	Full address shown on PDF footer
Phone	Business phone with country code
Email	Business email (format validated)
Tax ID	Tax registration number
Currency	Base currency for the platform

Data Backup & Sync

Action	What It Does
Backup to Drive	Uploads data to Google Drive appDataFolder. Requires Google sign-in.
Restore from Drive	Downloads and restores from Google Drive backup. Overwrites current data.
Export JSON	Downloads data as myBIZ_Data.json file. Local backup you can keep anywhere.
Save File	Uses File System Access API (desktop browsers) for direct file save.
Load File	Load a previously saved JSON file.

Important: Back up regularly! Google Drive sync and JSON export are your safety nets. If you lose your device, your data is safe in the cloud.

Configuration (Admin Only)

- **Modules** - Enable/disable entire modules
- **Features** - Toggle individual features within modules
- **Tax Rules** - Add/edit/remove tax types with rates
- **Environments** - Toggle Trading, Manufacturing, Services

Chapter 13: Shortcuts & Best Practices

Recommended Setup Order

Step 1: Complete setup wizard with business profile

Step 2: Add bank accounts (Finance > Accounts)

Step 3: Register suppliers as contacts (CRM > Contacts, type: Supplier)

Step 4: Create product catalog (ERP > Products)

Step 5: Define BOMs if manufacturing (Production > BOM)

Step 6: Add employees (HR > Employees)

Step 7: Create user accounts with permissions (Users & Access)

Step 8: Start daily operations

The Complete Workflow Path

Follow this path for the most integrated experience:

Contact >	Lead >	Deal >	Quote
O / Production / Service >	Project >	Invoice >	Payment

Multi-Currency Best Practices

- Set your base currency correctly at setup - it is used as the reference for all conversions
- When selecting a foreign currency on any form, the exchange rate field is mandatory
- The converted amount in base currency is shown as a preview
- Payments can be received in a different currency than the invoice

Data Safety

- Data is stored in your browser's localStorage - clearing browser data deletes everything
- Use Google Drive backup regularly for cloud safety
- Export JSON as a secondary backup before major changes
- Each device has its own local data - use Drive sync to keep them aligned

Thank you for using myBIZ!

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