

Software User Guide of IDP Manager Portal

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Revision History

Date	Version	Author	Change
2025/02/18	1	Amarangi Karunathilaka	Login Forget Password
2025/03/20	2	Amarangi Karunathilaka	Basic Organization Settings

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1. Introduction to the user guide

Introduction to User Manual: IDP User Management

This guide is designed to provide you with a detailed understanding of how to effectively manage users and assign privileges within the IDP system. Privilege assignment is a crucial aspect of ensuring secure and efficient system operation. Whether you are an administrator responsible for configuring access levels or a user seeking to understand the permissions associated with your account, this manual will serve as your go-to resource.

1.1 Key features

Role-Based Access Control (RBAC): Create and customize roles based on job responsibilities or organizational hierarchy.

Granular Permissions: Assign precise permissions to users or roles, ensuring that individuals have access only to the functionalities necessary for their tasks.

User-Friendly Interface: The system boasts an intuitive interface for seamless privilege assignment, minimizing the learning curve for administrators.

1.2 How to use this Manual

Navigate through the sections to discover step-by-step instructions, best practices, and tips for effective privilege assignment. Whether you are new to the system or a seasoned administrator, this manual is structured to cater to users of all levels.

Thank you for choosing our company for building your system, and we trust that this User Manual will be an invaluable resource as you optimize user privilege assignments within your organization. Let's embark on this journey of secure and tailored access together!

2. Introduction to the IDP System

2.1 Purpose

The project is focused on developing a comprehensive task management system aimed at enhancing and streamlining operations for three primary stakeholders: the Super Admin, Manager, and Staff Portal users. Each user group has distinct roles and responsibilities within the system, and the platform is designed to equip them with the necessary tools for efficient event execution.

The project aims to create a unified and integrated platform that enhances task management, promotes user collaboration, and enables stakeholders to efficiently fulfill their roles. It encompasses customer management, staff management, task tracking, and reporting. The system simplifies customer onboarding, service agreements, and billing processes while optimizing staff scheduling and ensuring timely task completion. It also monitors customer service activities and provides insights to support data-driven decisions and performance analysis. The primary objective is to automate key operations, boost efficiency, and elevate the quality of service delivery.

2.2 Scope

2.1. In Scope

- **Manager Portal(Admin) :** Manager portal will be used by the organization owners, managers for management, planning and operations of staff and customers.
- **Staff Portal**: The staff portal will be used by staff who are doing tasks assigned by the managers for relevant customers.

2.2. Out Of Scope

• Admin Portal(Super Admin) : The portal will be used for managing vendors, subscribed plans and payments/billings associated with these plans.

• The complete admin portal functionalities have not been finalized.

2.4 Overview

The purpose of this user guide document is to describe the steps to follow for the IDP manager and staff portal navigation. The portals will offer a comprehensive platform for managers and staff to make and manage tasks and track the progress.

The IDP will be divided into three parts: the Manager(Admin) Portal, the staff Portal and Admin(Super Admin) Portal.

- The manager can be onboarded to the IDP system through a redirect from the corporate website. They will have access to comprehensive system information via the dashboard. The manager's responsibilities include managing contracts, work orders, leave management, scheduling, time tracking, and staff management. They can also oversee user management by adding users, assigning roles, and generating reports based on system activities.
- Staff will have access to a list of tasks assigned by the manager. They can clock in and out for tasks, apply for leave, and take breaks during tasks. The system will also display routes for work orders to complete tasks and allow staff to provide comments aligned with each task.
- The super admin will oversee the management of customers onboarded to the system. The admin will handle country and industry setup, which will be reflected in the manager portal, as well as manage subscriptions. Additionally, the admin will have access to comprehensive system information through the dashboard.

2.5 Manager Portal Modules

Manager Portal :

I. Login

Allow users to securely authenticate and access the manager portal for managing system functionalities and data.

II. Forget Password

Allow registered users to securely reset their passwords if they forget or need to change them.

III. Basic Organization SettingsAllow registered users to create branches to their organizations.

2.5.1 Login

Welcon	Dinfinity day planner
Email	
Enter your email address	
Password	
Enter password here	\
Remember me	Forgot Password?
Login	
Don't have an Account	? Sign Up

- Open the IDP system URL in your web browser.
- Enter your Email and Password in the designated field and click the login button.
- Check "Remember Me" if you want to stay logged in.
- If the "Remember Me" is not selected, then automatically logged out 3 minutes after logging in.
- If login is successful, you'll be redirected to the "Dashboard".
- If login fails, check your credentials and try again.

2.5.2 Forget P	assword		
		Enter password here	

• On the Login Page, click "Forgot Password?" below the password field.



- Once after the user clicks the "Forgot password" link then the user should be able to see the screen to enter the registered "Email" address.
- Click the "Send Mail" button.
- Then the user will receive an email with the "Reset Password" option.

infinit day plann	y for
H Pa	li Thurairajasingam Pirashanth, assword Reset Request for Your IDP Account!
We receive	d a request to reset your password for your IDP account. If you didn't request a password reset, please ignore this email.
	To reset your password, click the button below:
	Reset Password
This link wil assista	expire in 1 hour. If you encounter any issues or need further ince, please don't hesitate to contact our support team. Thank you, IDP Support Team
This link will assista If you have cont	expire in 1 hour. If you encounter any issues or need further ince, please don't hesitate to contact our support team. Thank you, IDP Support Team any questions or need additional help, please reply to this email or act our support team at <u>support@UDP.com</u> or +447894564.
This link will assista	expire in 1 hour. If you encounter any issues or need further ince, please don't hesitate to contact our support team. Thank you, IDP Support Team any questions or need additional help, please reply to this email or fact our support team at <u>support@IDPcom</u> or +447894564.
This link will assiste	expire in 1 hour. If you encounter any issues or need further ince, please don't hesitate to contact our support team. Thank you, IDP Support Team any questions or need additional help, please reply to this email or fact our support team at <u>support@IDP.com</u> or +447894564.

• Click the "Reset Password" button to redirect to the "Reset Password" screen.

← Back	infinity day planner
Reset Passw	ord
Please enter your new password by re-entering it belo	l and confirm it w.
New Password	
) Jacob
Confirm New Password	
Submit	

- Once after redirecting to "Reset Password" screen, will get the following fields
 - New Password
 - Confirm Password
- Must be required to input both the "New Password" and the "Confirm New Password" passwords before clicking the "Submit" button.
- Once successful, you'll see a confirmation message. Click "Login".
- Enter your **Email and new Password** and click "Login" to access the system.

2.5.3 Basic Organization Settings

• After logging in to the system, as a first time user, the user should be able to set up branch information, contact information, opening settings and shift configuration related to the organization.

2.5.3.1 Branch Information

• First, set up the owner details of the organization.

infinity day planner	Branch 2 Contact Information	ion (3) Opening (4) Shift Configuration	
Organization Settings Explore industry-specific features. Choose	Organization Sattings		
what fits your needs and find the perfect tier for your business.	Fill out the business owner details below to get started with settin	ng up your business	
	Owner Details 1 of 4 steps completed		
	Owner First Name *	Owner Last Name	
		Next	
		Cancel	

• Next, set up office details of the branch.

infinity day planner	Branch (2	Contact Opening Information Setting	A shift Configuration
Crganization Settings Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.	← Back Organization Settings Enter your office name and website URL.		
	Office Details 2 of 4 steps completed Office Name *	Web Site URL	
	Enter your head office name	Paste your company web site I	JRL
		Next Cancel	

• After that, set up address details of the branch with defining areas using the map.

	Branch Information	2 Contact	Opening Setting	4 Shift Configuration
ettings				
ic features. Choose	← Back			
id find the perfect	Organization Settings	atup.		
		a color		
	Address			
	3 of 4 steps completed			
	Door Number *		Address Line 1 *	
	Ex: No: 50		Enter your address	
	Address Line 2		City/Town *	
	Enter your address		Enter your city or town	
	Postcode *		Country *	
	Enter your postalcode			~
	Area Details 0 Area			Q Search here
	No Area Name	Marked lo	cation(s) Des	cription
			No Data	
	Define Area			
	Define Area You can define areas by clicking on the m	nap.	Description	
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	Define Area You can define areas by clicking on the m Area Name* Enter area name Mark Location(s) Use the map to search for and add areas	by clicking on the desired locations.	Description Add description here Hegers Hegers NEVADA Humboldif Toylabe National Forest Patholaco San Jose Lower	DTAP MAN IN THE OFFICE OF THE OFFICE
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	Define Area You can define areas by clicking on the m Area Name * Enter area name Mark Location(s) Use the map to search for and add areas	by clicking on the desired locations.	Description Add description here Helgere Hergers Secremento Francisco San Jose Francisco CALIFORNIA Desch Valley National Park Las	Des Des Contractor de la contractor de l
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	Define Area You can define areas by clicking on the m Area Name * Enter area name Mark Location(s) Use the map to search for and add areas Groupia	tap.	Description Add description here Add description here Regen Rege	Point and the set of t
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	Define Area You can define areas by clicking on the main of t	tag.	Description Add description here Repro NEVADA Sacragnento Humbolati Toylable Francisco Description Sacragnento Humbolati Toylable Francisco Description CALIFORNIA Description No Data Description	Argens All INDA AND AND AND AND AND AND AND AND AND

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Document: IDP

• When searching through the map, the searched location will be shown as an area on the map. Click the "**Mark location**" button to select the specific location to that particular area. Then that location will add to the below table.



• After saving the area details, then it will be displayed in the "Area Details" table.

infinity day planner	Branch (2)	Contact (3	Opening Setting	(4) Shift Configuration
Organization Settings				
Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business	Area Details 1 Area			Q Search here
iter for your buancess.	No Area Name	Marked location(s)	Description	
	1 Mumbai	Mumbal, Maharashtra, India		2 🔟
		Badlapur, Maharashtra, India		2 🔟
	Define Area You can define areas by clicking on the map.			
	Area Name *	Description		
	Enter area name	Add descrip	tion here	
	Mark Location(s) Use the map to search for and add areas by click	ing on the desired locations.	Saula	बारेगांव

• Added area details can be deleted through the "**delete**" option in the table and edit through "**edit**" option in the table

infinity day planner	Branch	Contact	(3) Open Settir	ing	(4) Shift Configuration	
Organization Settings						
Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.	Area Details 1 Area				Q Search here	
	No	alata Pacord?	×	Description		
	Are you su	re you want to delete this record?			_ ₪	
	This action	is permanent and cannot be undone!			e ū	
	Define Area You can define areas by clicking o	Cancel Yes, Del	ete			
	Area Name *		Description			
	Enter area name		Add description here			
	Mark Location(s) Use the map to search for and ad	d areas by clicking on the desired locations.			बार्यगाउँ 👘	

• As the next step, set up the company logo of the branch.

Infinity	Branch	
Organization Settings Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.	← Back Organization Settings Upload the logo of your organization.	
	Company Logo 4 of 4 steps completed	
	Save & Next Cancel	

• After adding the basic details of the branch, a popup message should appear regarding the success message.

D infinity	Branch Information	Contact	3 Opening Setting	4 shift Configuration
Organization Settings Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.	Company Logo	Vour Branch Has Been Created Successfully Vou have successfully added branch information. Please add contact information to complete the process.	× ag and drop BMB	
		Save I Car	& Next	

2.5.3.2 Contact Information

• After setting up the basic information, add contact information of the branch as primary contact information.

infinity day planner	Branch [ontact]	3 Opening 4 Shift Configuration
Organization Settings Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.	← Back Contact details - Codelantic (Pvt) Ltd. Enter primary contact details.	
	Primary Contact Details	
	First Name *	Last Name
	Enter first name	Enter last name
	Contact Number 1 *	Contact Number 2
	✓ Enter contact number 1	Enter contact number 2
	Email Address *	
	Enter primary person email address	
		Next
		Cancel

• Next, add secondary contact information.

Branch (2) Contact (2) Information	3 Opening 4 Shift Configuration
← Back Contact details - Codelantic (Pvt) Ltd. Enter secondary contact details.	
Secondary Contact Details 2 of 2 steps completed	
First Name *	Last Name
Enter first name Contact Number 1 * V Enter contact number 1	Contact Number 2
Email Address • Enter primary person email address	
	Source & Hand
	Cancel
	Franch Information Contact Contact details Contact details Contact details Contact details Secondary Contact Details 2 of 2 ways completed First Name * Enter first name Contact Number 1 * Contact Number 1 * Enter primary person email address Information

• After adding the contact details of the branch, a popup message should appear regarding the success message.

infinity day planner	Branch [Information] Contact	3 Opening 4 shift Configuration
Organization Settings Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.	← Back Contact details - Codelantic (Pvt) Ltd.	
	Enter secondary contact of Secondary Conta 2 of 2 steps computed First Name * Amarangi Contact Information has been successfully proceed with Opening Setting Continue to Opening Setting	x ormation idded. Please
	Email Address *	Contact number 2

2.5.3.3 Opening Settings

• After adding the contact information, add opening settings of the branch.

infinity	Branch	Contact	Opening Setting	(4) shift Configuration
Organization Settings Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.	← Back Opening Setting - Codelant Configure the branch Opening and	tic (Pvt) Ltd. I Closing hours.		
	Opening Settings	sed		0
	Tuesday & Clo	ised		0
	Wednesday & Clo	ised		•
	Thursday & Clo	sed		0
	Friday & Clo	sed		0
	Saturday & Clo	sed		0
	Sunday & Clo	ised		0
			Save & Nevt	
			Cancel	

• When clicking the (+) button, it will open another section to specify the closing and reopening times by setting a time frame with instructions "Specify the times when the organization will reopen after being closed".

infinity day planner	Branch	Contact	Opening Setting	(4) Shift Configuration	on
Organization Settings Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.	← Back Opening Setting - Codelan Configure the branch Opening and	tic (Pvt) Ltd. I Closing hours.			
	Opening Settings				
	Monday 09:0	0 AM ‡	To	05:00 PM 🗘 📀	
	✓ Tuesday 09:0	0 AM \$	То	05:00 PM 🗘 📀	
	Vednesday 09:0	0 AM \$	То	05:00 PM 🗘 📀	
	Thursday 09:0	0 AM \$	То	05:00 PM \$	
		Return Specify the times when the organizat	ion will reopen after being closed. To	Time PM C	
	Friday & Clo	sed		•	
	Saturday 🕒 Clo	ised		0	
	Sunday & Clo	ised		0	
			Save & Next		
			Cancel]	

• There will be a (-) button in the reopening and closing time setting section, click that to discard reopening and closing details.

• After adding the opening settings of the branch, a popup message should appear regarding the success message.



2.5.3.4 Shift Configuration

• In the basic organization settings the final step is to set up the shift configuration in the branch. This will be the initial screen for a first time user.

infinity day planner	Branch Information Contact Information Opening Setting	Shift Configuration
Organization Settings Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.	← Back Shift Configuration - Codelantic (Pvt) Ltd. Click add shift details to configure a new shift.	
	Shift Configuration	+ Add Shift Details
	Save & Next Cancel	

• Through "Add Shift Details", add a new shift to the branch.

infinity day planner	Presech Contact Consist	
Organization Settings	Add a New Shift	
Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.	Set up a suitable shift for your organization	+ Add Shift Details
	Shift Name • Enter shift name here Shift Starting & End Time * Time AM \bigcirc To Time PM \bigcirc	
	Cancel Add Shift	

• After that, added shift details will be displayed in a table.

infinity day planner	Branch Information		– Contact – Information		_ Opening _ Setting		Shift Added Successfully	x
Organization Settings Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.	← Back Shift Confiț Manage existi	juration - Codelantic (I	Pvt) Ltd.					
	Shift Co	onfiguration					+ Add Shift Details	
	No.	Shift Name Morning Shift	Start Time 09:00 AM	End Time	Status	Action	2 🗊	
	02	Evening Shift	01:00 PM	05:00 PM	Active		<u>2</u>	
				Save & Next				
				Cancel				

• Added shift details can be edited by redirecting through the "edit" option in the table.

e infinity	Brunch Contract	Shift Configuration
Organization Settings	Edit Shift Details	
Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.	Set up a suitable shift for your organization	
	Shift Name *	+ Add Shift Details
	Evening Shift	
	Shift Starting & End Time * 01:00 PM To 05:00 PM	Action
		C <u>2</u>
	Cancel Save Edit Details	
	Save & Next	

D infinity	Branch Information Generation Generation Generation	ning () Shift Ing Configuration
Organization Settings Explore industry specific features. Choose what fits your needs and find the perfect tier for your business.	← Back Shift Configuration - Codelantic (Pvt) Ltd. Manage existing shifts and add new one: Shift Configur Delete Shift Details Are you sure you want to delete this detail? This action is permanent and cannot be undone! Back Back Back	Actors
	Save & Next Cancel	

• Added shift details can be deleted by redirecting through the "delete" option in the table.

• Use the toggle in the table to enable or disable a shift.

infinity day planner	Branch Information	Contact	n	— Opening — Setting	Ø	Shift Status Upda	ted Configuration
Organization Settings Explore industry-specific features. Choose what fits your needs and find the perfect tier for your business.	← Back Shift Configuration Manage existing shifts a	- Codelantic (Pvt) Ltd. ind add new ones.					
	Shift Configura	tion				+ Add Shif	t Details
	No. Shi	rt Name Start Time	End Time	Active		2	ŵ
	02 EW	Shift 01:00 PM	05:00 PM	Inactive		L	D
			Save & Nex Cancel	t			

• After adding the shift details of the branch, a popup message should appear regarding the success message.

