



User Manual

V2.0

Table of Contents

Purpose of the Document	3
Icons Used in the Manual.....	3
Organisation of the Manual	4
System Overview	4
System Summary.....	4
User Access Levels.....	4
Navigating Pappaya	4
Login.....	4
Common Field Definitions	4
Invoice Management.....	5
Accounting.....	5
Payroll management	6
Payroll	6
Projects	7
Recruitment Management.....	7
Recruitment	7
Questionnaire	8
HR Management	9
Onboard	9
Employees.....	9
Offboard	10
Timesheets and Expense Management	10
Timesheets.....	10
Expenses.....	11
Other Navigating Modules.....	12
Calendar.....	12
Supplier Management	13
Contract Management.....	13
Settings	14
Revision History	15

Purpose of the Document

The Pappaya User Manual is a help tool that enables you to view all help content for Pappaya Applications and Tools. The User Manual provides standard navigation and full-text searching, as well as context-sensitive online help for Pappaya users.






Pappaya User Manual documentation contains information that applies to multiple applications. The two main types of common functionalities are:

- Application Fundamentals
- Using Pappaya Application

This information applies to many or all applications in the Pappaya Software. Whether you are implementing a single application or a combination of applications, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks. In addition, Pappaya User Manual also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using Pappaya Applications.

Icons Used in the Manual

Throughout this document, the pictograms below are used to underline points or important notifications.

	Important information
	Tips to Remember
	Risk in front of a parameter setting or of a specific action
	Action to be avoided
	Mandatory action
Bold	Highlights Pappaya function names, business function names, event names, system function names and method names.
<i>Italics</i>	Highlights field values, emphasis, and Pappaya or other book-length publication titles. In Pappaya syntax, italic items are placeholders for arguments that your program must supply.

Organisation of the Manual

The user's manual consists of three sections:

- System Overview
- Navigating Pappaya.
- Revision History

System Overview

System Summary

Use the following link to login to the Pappaya Application:

<https://customername.pappaya.co.uk/web/login>

User Access Levels

Everyone can use this application, but only registered users can save data to the database. The Customer System Management team defines all User access levels.

Navigating Pappaya

Login

Login with your User ID and Password. Once you are logged in, the Home page appears.

Common Field Definitions

This section provides detail about fields that are generally common throughout the Pappaya application.

Field	Description
Create	You can create a new form.
Edit	You can edit the existing forms.
Save	You can save the changes made in the form.
Discard	You can reset the fields in the form.
Attachment(s)	You can send the form along with an attachment.
Action	You can use this drop-down list to delete and make a copy of the form.
New message	You can send a message with the form.

Field	Description
Log an internal note	You can also log a note for your internal purpose with the form.
Following	You can follow up with the form.
Add Followers	You can add followers and channels to the form.
Filters	You can filter the view using this setting. In addition, you can add a custom filter to it.
Group by	You can group the view and apply custom group to it.
Favourites	You can save and share the current search/filtered details.
Import	You can to import a file to the forms. The file should be in CSV format.

Invoice Management

This section provides detail on how to create invoices and vendor bills.

ACCOUNTING

1. Go to **Accounting** and click **Sales** and **Customer Invoices** to view and create the invoices.
2. Click **Create** to create a new customer invoice.
3. Enter the following details:
 - **Customer**
 - **Invoice Date**
 - **Tenant Invoice**
 - **Sales Person**
 - **Payment Term**
 - **Sales Team**
 - **Currency**
4. Under the **Invoice Lines**, click **Add an item** to add details about the products, descriptions, number of units bought and price.
5. Under the **Other Info** tab, you can enter other information such as the Company name, due date and more.
6. Click **Validate** to send the invoice for approval. The application checks if the values entered are correct before sending it for approval.
7. After Validation, you need to Register Payment option that enables how the payment is made i.e. By Cash or By Bank.
8. Click **Vendor Bills** to view and create bills.
9. Click **Create** to create a new vendor bill.

10. Enter the following details:
 - **Vendor**
 - **Bill Date**
 - **Tenant Invoice**
 - **Due Date**
 - **Vendor Reference**
 - **Currency**
 - **Add Purchase Order**
11. Under the **Bill** tab, Click **Add an item** to add the bill details.

Payroll management

This section provides detailed step-by-step action on how to create projects and payslips. It enables you to assign a project to an employee and compute salary based on the details given.

PAYROLL

1. Go to **Payroll** and click **Employee Payslips** to view the list of employee payslips.
2. Click **Create** to create a new payslip for the employee.
3. Enter the following details:
 - **Employee** – Employee name
 - **Period** – Date range in which the payslip is created
 - **Contract** – Corresponding to which contract the payslip is created
 - **Reference** – Any reference to the payslip
 - **Structure** – Based on which the payslip is created
 - **Payslip name** – Name of the payslip
 - **Credit Note** – Check this box to provide credit note
4. Under the **Workdays & Inputs** tab, click **Add an item** to enter **Description, Code, Number of Days, Number of Hours,** and **Contract** for which this input is applied.
5. Under the **Other Inputs** tab, you can include additional inputs for this payslip.
6. Under the **Salary Computation** tab, click **Add an item** to enter **Name, Code, Category, Quantity, Rate (%), Rule,** and **Amount.** The **Total** is automatically updated based on the information provided.
7. Under the **Details By Salary Rule Category** tab, you can view the rule on which the salary computation is based on.
8. Under the **Accounting Information** tab, enter the **Company** name, **Made Payment Order,** and **Payslip Batches.**

PROJECTS

1. Click **Projects** to view the list of projects/timesheet account information.
2. Click **Create** to create a new project or timesheet account.
3. Enter the following details:
 - **Project Name**
 - **Reference**
 - **Tags**
 - **Customer**
 - **Employees**
 - **Manager**
 - **State**
 - **Company**
 - **Currency**
4. Click **Add an item** to assign employees to this project.
5. Click **Save** to save the information.

Recruitment Management

This section provides detailed step-by-step action on how to create a job opening, publish any job via website and/or company intranet, and track the job applicants.

RECRUITMENT

1. Click **Recruitment** to view Job Positions page.
2. Click **Create** to add a new job opening in the company.
3. Enter the title of the job in **Job Title**.
4. Enter the number of positions that are open in **No. of Open Positions**. These number of positions are displayed in the company's website.
5. Select the **Department**, **Recruitment Responsible**—point of contact for the recruitment, **Job Stages**—number of stages in the recruitment process, and **Job Location** from the drop-down lists.
6. Under **Configuration**, Click **Add an item** to assign the job stage and questionnaire to it.
7. Under **Mailing List**, click **Add an item** to select the mailing distribution list.
8. Click **Save** to save the details that are entered in this page. Or click **Discard** to reset the fields.
9. Click **NOT PUBLISHED ON WEBSITE** to publish the job opening on the website. To publish this job on company intranet, click **INTRANET ON**.

10. Click **LAUNCH RECRUITMENT** to initiate the recruitment for this job.
11. Go to the Website and click **Jobs** to view the job opening created. Click the job and click **Apply** to view the **Application Form** page.
12. Enter the **First Name, Last Name, Email, Mobile Number**, and upload the **Resume**. You may also provide **Telephone Number** and **Cover Letter**.
13. Click **Submit** to submit the application for the job.
14. Go to **Recruitment** and click **APPLICATION(S)** to view the received applications. This button is available only when you receive applications to this job.
15. Click the application you have received to view the application. You can do the following:
 - **MEETING** – Schedule a meeting.
 - **FEEDBACK** – Provide feedback.
 - **ANSWERS** – View answers if any.
 - **START INTERVIEW** – Start the interview moving to the next job stage. An email template appears that is sent to the applicant along with additional participants if any. Click **SEND** to send the email.
 - **DOCUMENTS** – View if there are any documents attached to this applicant.
 - **NOT ARCHIVED** – Archive this applicant.



You can have different stages to the onboard process. Click **Onboard Stages** to view and create the phases.

16. Click **ONBOARD** to select the applicant as an employee of the company. Or click **REFUSE** to reject the applicant.

QUESTIONNAIRE

1. Go to **Questionnaire** and click **Questionnaire** to view the list of questionnaires that are created.
2. Click **Create** to create new questionnaire.
3. Enter the **Title** – Name of the questionnaire.
4. Under **Edit Pages and Questions**, click **Add an item** to add questions and page title.
5. Under **Options**, you can select options such as:
 - User can come back in the previous page
 - Login required
 - Quiz mode
 - Available on Employee Onboard
 - Available on Supplier Registration

- Available for Job
 - Available on Offboard
6. Click **Design Questionnaire** to create the questionnaire.
 7. Click **Configuration**—you can configure pages, questions and labels.

HR Management

This section provides step-by-step process on how to do the on boarding process for the selected applicant and create employee information in the system. In addition, this section also describes the resignation process of the employee.

ONBOARD

1. Go to **Onboard** and click **CREATE** to view the **Onboardings/New** page. You can also navigate to this page through the **Recruitment** module.
2. Enter the **Name, Job, Department,** and **Onboards Expected** – number of onboards expected.
3. Under **Configuration**, click **Add an item** to configure the job stage and questionnaire required for the stage.
4. Click **LAUNCH ONBOARD** to launch the onboard process for the applicant. The application is listed in the Onboardings page.
5. Click **APPLICANT(S) ONBOARD** on the job that is listed to view the **Applicants Onboard** page.
6. Select the applicant and click **CREATE EMPLOYEE** to create new employee information in the system.

EMPLOYEES

1. Go to **Employees** and click **create** to view the **Employees/New** page. You can also navigate to this page through the **Onboard** module.
2. Enter the following details:
 - **First Name**
 - **Last Name**
 - **Employee Id**
 - **Gross Salary**
 - **Active**
 - **Date of Joining**
3. Select the type of employee (Permanent Employee, Contracts and so on) in **Associate Projects**.
4. Under **PUBLIC INFORMATION**, provide the **Contact Information - Office Address, Work Mobile, Email, Position - Department, Job Title, Manager** and more.

5. Under **PERSONAL INFORMATION**, provide the **Citizenship & Other Information, Status, Contact Information, and Birth**.
6. You can also initiate offboard process through this module. Select an existing employee record who wants to resign from the company. Click **INITIATE OFFBOARD** to view **Offboard Employee** dialog window. Click **YES** to initiate the process.
7. Click **Contracts** to view the list of contracts.
8. Click **Create** to add a new contract.
9. Enter the **Contract Reference, Employee, Department, Job Title, Contract Type, and Source**.
10. Under the **Information** tab, you can provide salary and wage details, and Duration.
11. Under the **Work Permit** tab, enter the Visa and work permit information.

OFFBOARD

1. Go to **Offboard** and click **CREATE** to create a new offboard process. You can also navigate this page through Employees module.
2. In the **Offboardings/New** page, enter the following details:
 - **Name**
 - **Offboard Stages**
 - **Job**
 - **Department**
 - **Offboards Expected**
3. Under **Configuration**, click **Add an item** to configure offboard stage and questionnaire.
4. Click **LAUNCH OFFBOARD** to initiate the resignation process.
5. Click **Offboardings** and click **EMPLOYEE(S) OFFBOARD** on the employee record.
6. Click on the employee from the list and click **OFFBOARD** to initiate the first stage of the process.

Timesheets and Expense Management

This section provides detailed step-by-step action on how to create timesheets and approve them. In addition, it also describes how to create an expense form and submit it for manager's approval.

TIMESHEETS

1. Click **Timesheets** to view the Timesheet page.
2. Click **Create** to open a new timesheet.
3. Select the date range from the **Timesheet Period** and the project from the drop-down list.
4. Enter the working hours corresponding to the date and project.

5. Click **Add a Line** to add another project and enter the working hours corresponding to it.
6. Click **Save** to save the timesheet created. Or click **Discard** to delete the timesheet.
7. Click **Submit to Manager** to submit the timesheet for manager's approval.
8. Select **My Timesheets** from the **Time Tracking** drop-down to view timesheets that are created and their status.
9. Click **Timesheets to Approve** to view the list of timesheets that are pending for approval.
10. Click on the employee's timesheet to view the timesheet that is submitted for approval.
11. Select the timesheet you want to approve. Under the **Details** tab, click **Approve** to approve the timesheet.
12. Click **Refuse** to reject the approval. The respective timesheet goes back to the employee for any changes to be made and again sent for manager's approval.

EXPENSES

1. Click **Expenses** to view the My Expenses page.
2. Click **Create** to open a new expense form and enter the following details:
 - a. **Expense Description** – enter the expense description in the provided space.
 - b. Select the product from the **Product** drop-down list.
 - c. Select the date from the calendar.
3. Enter the **Unit Price, Employee, Quantity, Currency, Taxes, Analytic Account, Company, Expense Journal, Journal Entry** and **Payment By**. In addition, you can enter notes in the **Notes** section.
4. Click **Save** to save the details entered. Or click **Discard** to reset the details.
5. Click **SUBMIT TO MANAGER** to submit the expense record for manager's approval.
6. Click **To Approve** to view the list of expenses that are pending for approval.
7. Click the expense and click **Approve** the expense that is submitted. Or you can click **Refuse** to reject the expense submitted.
8. Click **Set to Draft** if you want to save this expense in the application.

Other Navigating Modules

This section provides detailed step-by-step action of the remaining modules in the application.

CALENDAR

You can manage the meeting and event details using Calendar. Video conferencing option is available with the meeting. It is available 30 minutes prior to the meeting start and 2 hours after the meeting end time.

1. Go to **Calendar** to view the Meetings page and it is displayed in week layout by default. You can also view it in Day and Month view.
2. Click on any of the hours to view the **Create** dialogue box. Enter the description in **Summary** and click **Create** to add the meeting.
3. Click **Edit** to modify the meeting description. The following details are also for creating the meeting:
 - a. Enter the subject or topic of the meeting.
 - b. Add the members who attended the meeting.
 - c. Enter the meeting details such as, **Starting at, Tags**—Agenda or details discussed, **Duration, Reminders, Location**—Location of the meeting, **All Day** – meeting is held all day, and **Description**—Description of the meeting held.
4. Go to **Options** tab to change the Recurrent, Privacy settings.
 - a. **Recurrent**—To notify whether the meeting is a recurrent event or not.
 - b. **Privacy**—Limiting the access to view the details about the meeting.
 - c. **Show Time as**—Notify the time as Free or Busy.
5. Go to **Invitations** tab to send the meeting details.
 - a. **Send Mail**—Send invitation for the meeting through mail.
 - b. **Contacts**—This column displays the list of contacts that are all invited for the meeting.
 - c. You can check on the status of the Invitation: Whether the invited person accepted to attend the meeting.
 - d. Enter the Email ID of the employee.
6. Go to **Misc** tab to change the owner details.
7. Click **Week** to view the days of the week. You can also add the meeting/event details.
8. Click **Month** to view the monthly calendar. You can also add the meeting/event details.
9. Click **My Events** to filter by the events.
10. Click **My Meetings** to filter by the meetings.
11. Click **Unread Messages** to filter by the unread messages.

12. Click **Monthly Calendar** icon to displays the current month's monthly view at the right side of the screen. You can click on the date to navigate to the date.
 - a. You can add another user's calendar to your calendar.
 - b. By using the right and left arrows, you can navigate through the month wise display.
13. Click **Display Calendar** icon to view the calendar.
14. Click **List** icon to view the meetings/events created. The Subject, Start Date, End Date, Attendees, Location and Duration are displayed.

SUPPLIER MANAGEMENT

1. Go to **Supplier Management** and click **Suppliers** to view the list of Vendors.
2. Click **Create** to add a new vendor to the system.
3. Enter the name of the **Individual** and Company or the **Company** name.
4. Enter the **Address, Job Position, Phone, Country Code, Mobile, Website, Fax, Email, Title, Language, and Tags**.
5. Under the **Contacts & Addresses** tab, you can view or **Create** the contact, invoice, shipping, and other addresses.
6. Under the **Tenant Info** tab, enter the tenant information of the supplier name.
7. Under the **My Applications** tab, click **Is an Applicant** checkbox if the vendor is an applicant.
8. Under the **Internal Notes** tab, you can enter any notes for internal purpose.
9. Under the **Sales & Purchases** tab, you can enter the sales and purchases information.
10. Under the **Account** tab, you can view and enter the accounting information of sales and purchases by the vendor.
11. Click **Save** to save the new vendor entry. The new vendor information is listed in the **Vendors** page.
12. Click **Supplier Registration** to view and create the Suppliers information.
13. Click **Create** to register the Supplier.
14. Enter the **Supplier Name, SUPPLIER INFORMATION** and **COMPANY INFORMATION**.
15. Click **Propose** to recommend the supplier to the manager.
16. Click **Provide Decision** to **Approve** or **Reject** the Supplier.
17. Click **Supplier Registration Type** to view the type of registration. Click **Save** or **Discard**.

CONTRACT MANAGEMENT

1. Go to **Contract Management** and click **Inbound Contracts** to view the list of incoming contracts.

2. Click **Create** to draft a new inbound contract.
3. Enter the following details:
 - **Client Information**
 - **Contract Name**
 - **Value of Contract**
 - **Contract Ref. number**
 - **Penalties (%)**
 - **Contract Received Date**
 - **Invoicing Information**
 - **Duration**
 - **Project**
 - **Services Covered**
4. Under **Resource Details** tab, click **Add an item** to add the resource information used for this contract.
5. Click **Clients** to view the list of customers.
6. Click **Create** to create a new client. This page is like creating a new vendor. Refer **Create** .
7. Click **Outbound Contracts** to view the Supplier information.
8. Click **Create** to create to enter a new supplier information.



You can also view the list of supplier's information when you click **Suppliers** under Contract Management.

SETTINGS

1. Go to **Settings** and click **Users > Users** to view the list of users in the application.
2. Click **Create** to add a new user to the application.
3. Enter the **Name** and **Email Address**.
4. Under the **Access Rights** tab, you can provide access level information such as **Application** level access, **Technical Settings**, **Human resources**, **Supplier Registration** and so on.
5. Under the **Preferences** tab, you can set the **Language**, provide **Menu Customisations** and customise **Signature** and **Emails**.
6. Click **Send an Invitation Email** to send the user details to the employee.
7. Click **Change Password** to change the password.
8. For active users, click **Send Reset Password Instructions** to send the password reset details.

Revision History

Version	Updated by	Comments
1.0	<Organization/Author's name>	First Issue