

Managers Portal User Manual

1. Introduction

About the Managers Portal

The Managers Portal is a powerful tool within Lean Tech's operations platform, designed to provide managers with comprehensive insights into various aspects of the company's operations. This manual will guide you through the portal's functionalities and how to navigate them effectively.

Components of the Portal

The Managers Portal consists of four main modules: Home, Billing, Resource Release, and Exceptions. Each module serves a specific purpose and empowers you to manage your team and resources efficiently.

2. Home Module

Overview of the Main Page

Upon logging into the Managers Portal, the home page welcomes you with a list of existing active accounts in the company. The top section displays key insights such as total payroll cost, active accounts, assigned employees, profits, and margin generated in the last month.

Insights and Key Metrics

The upper section of the page provides an overview of important metrics, enabling you to grasp the current state of operations at a glance.

General Account Information

Each account's general information is highlighted, including the account type, status since its inception, and allocated billable resources.

Resource and Accounting Tabs



Employee Summary

[illegible]

Introduction to Billing Interface

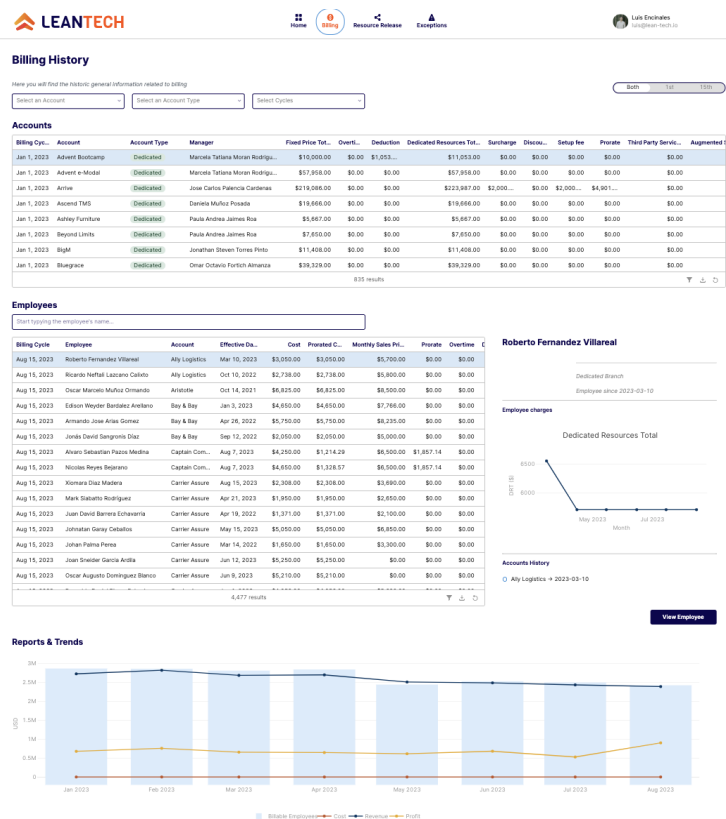
The Billing module focuses on managing and analyzing account billing. It offers a breakdown of invoices for each account, encompassing allocated resources and totals.

Account Summary and Filtering

You can use filtering options to select specific accounts and billing cycles. The interface provides a comprehensive view of account-related billing data.

Employee Details and Resource Trends

For each billing cycle, you can view individual employee costs and details. Graphs showcase resource allocation trends and variations in invoiced amounts for selected employees.



4. Resource Release Module

Managing Employee Transitions

The Resource Release module handles transitions of employees between accounts. Recent transactions and their statuses are displayed at the top.

Viewing Recent Transactions

You can review the most recent transitions and their effective dates. Pending transitions are also highlighted.

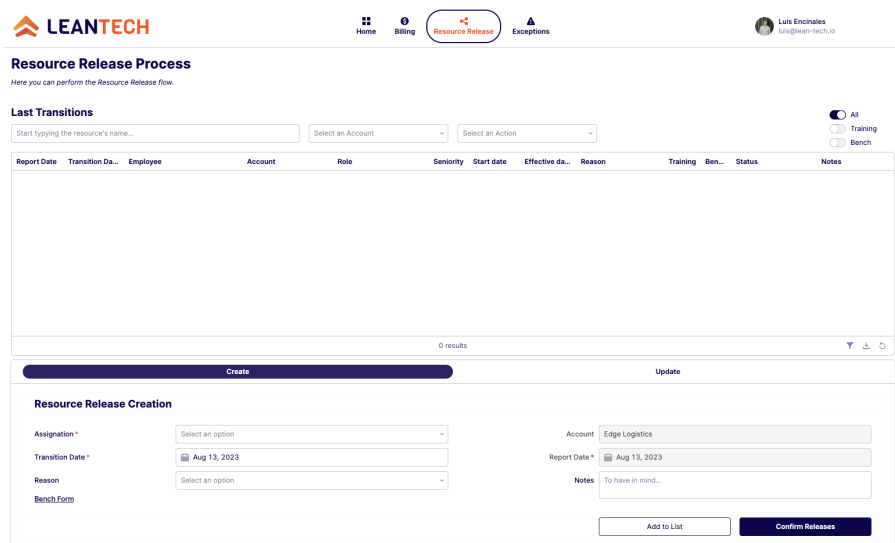
Creating and Modifying Transitions

Within this module, you can create new transitions, define their duration, and select relevant reasons. Existing transitions can be modified, ensuring accurate records.

Using the "Resource Release" Feature for Account Managers

With this feature, Account Managers play a pivotal role:

- Managers can add individuals to the portal and update collaborator information if they are already on the list.
- After completing the information update, click on "Confirm Release." Here, you can add individual notes for each person and automatically view the email addresses to which notifications will be sent.
- You also have the option to add additional notes if necessary or copy and paste previously entered information for each person.



The screenshot displays the LEANTECH Resource Release Process interface. At the top, the LEANTECH logo is on the left, and navigation links for Home, Billing, Resource Release (highlighted), and Exceptions are in the center. A user profile for Luis Encinales is on the right. Below the header, the title "Resource Release Process" is followed by a subtitle: "Here you can perform the Resource Release flow." The main section is titled "Last Transitions" and includes a search bar and dropdowns for "Select an Account" and "Select an Action". A table with columns: Report Date, Transition Date, Employee, Account, Role, Seniority, Start date, Effective date, Reason, Training, Ben..., Status, and Notes is shown. Below the table, a "0 results" message is displayed. The bottom section is titled "Resource Release Creation" and contains two tabs: "Create" and "Update". The "Create" tab is active, showing fields for Assignment (dropdown), Transition Date (calendar icon, Aug 13, 2023), Reason (dropdown), and Bench Form. The "Update" tab shows fields for Account (Edge Logistics), Report Date (calendar icon, Aug 13, 2023), and Notes (text area). At the bottom right, there are "Add to List" and "Confirm Release" buttons.

5. Exceptions Module

Novelties and Exceptions Overview

The Exceptions module allows the creation and management of payroll novelties. A table displays various exceptions and their details.

Approval Status and Backoffice

The approval status of each novelty is visible, indicating whether Backoffice has approved it.

Creating Payroll Novelties

Novelties can be created for specific employees, with relevant details filled in the form provided.



Home

Billing

Resource Release

Exceptions

Luis Encinales
luis@lean-tech.io

Billing Exceptions & Payroll Novelties

Here you will find all the information related to our exceptions and payroll novelties. You will be able to see the list of histories as well as create a new one and automatically send emails to the parties involved in those

Exceptions List

Payroll Novelties List

Name	Exception	Cycle	Account	Reason	Start date	End date	Amount	T. Fee	Total	Leader Appr.	BO Appr.	Notes
------	-----------	-------	---------	--------	------------	----------	--------	--------	-------	--------------	----------	-------

0 results

Request new Exception/Novelty

Start typing the employee's name...

Select Accounts

Name	Account	ID number	Contract type	Salary
Alberto Mario Ahumada Cabrera	Operations	1001941021	Basic	COP 1,160,000
Armando Enrique Perez Horta	Operations Portal	72243498	Basic	COP 4,000,000
David Zuluaga Ramirez	Product	71313617	US Contractor	\$4,000
Estefany Sugrey Salgado Bequis	Operations	1234090024	US Contractor	\$1,800
Isabel Delgado Cardona	Operations	1037666189	Basic	COP 2,400,000
Jader Ricardo Neira Perea	Operations Portal	1151938233	Basic	COP 6,500,000
Jose Alejandro Rojano Orison	Operations Portal	1140828533	US Contractor	\$3,800
Leticia Mesquita	Product	707625	US Contractor	\$4,200
Luis Fernando Encinales Meza	Operations	1140852061	Basic	COP 0
Maylin Estefany Gomez Castillo	Operations	1067950550	Basic	COP 0
Rodan Andres Oliveros Guerrero	Operations Portal	80870585	US Contractor	\$3,000
Sara Paola Mesa Benitez	Operations	1214746691	Basic	COP 2,500,000
Vanessa Alfo Orozco	Product	1144059267	US Contractor	\$4,000

13 results

Create Exception

Create Payroll Novelty

Exception

Select an Exception

Select a Reason

Select a Cycle

Approved by

Start date

End date

Amount *

\$

0.00

Transactional fee *

12%

Total

\$

0.00

Payroll novelty?

Notes

Enter value

upload to S3

Submit Request

Browse

6. Conclusion

Leveraging Managers Portal for Efficiency

The Managers Portal equips you with tools to make informed decisions and manage Lean Tech's operations effectively.

Contacting Support

For any inquiries or assistance, feel free to contact our dedicated support team.