Enterprise Dashboard

User Manual

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Introduction

The HesabPay Enterprise Dashboard User Manual provides a comprehensive guide to effectively navigate and utilize our feature-rich platform. This user manual covers essential sections that are crucial for managing your enterprise's financial operations.
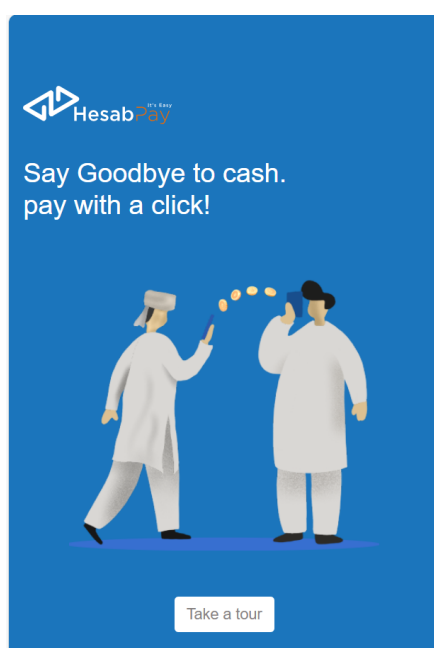
Explore the Payroll section to streamline your payroll processes and ensure timely salary disbursements. Learn how to efficiently handle Humanitarian Aid or Cash Transfer transactions, enabling seamless assistance to those in need.

With the Bulk Topup feature, conveniently recharge multiple accounts or services in a single action. Lastly, gain insights into User Management, empowering you to manage and control user access and permissions. This user manual serves as your go-to resource for maximizing the potential of the HesabPay Enterprise Dashboard.

The Login Process to HesabPay Enterprise Dashboard:

Steps:

- Navigate to the official HesabPay Enterprise Dashboard login page (https://www.hesab.af/enterprise).
- Enter Credentials. Input your registered email address or phone number associated with your HesabPay Enterprise account in the designated field.
- tick/mark the privacy policy.

- Enter the OTP code that you have received by email or phone.
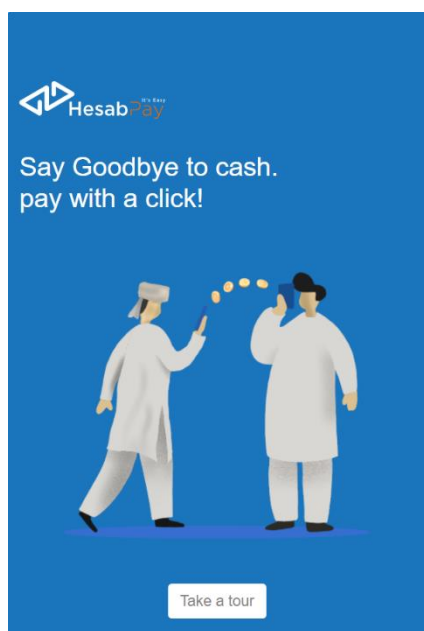
- Select the Hesab Enterprise Tab.

- If two-factor authentication is enabled, click on your profile and then click on '**Two Factor Auth**'.

- It will display the google authenticator activation QR code.
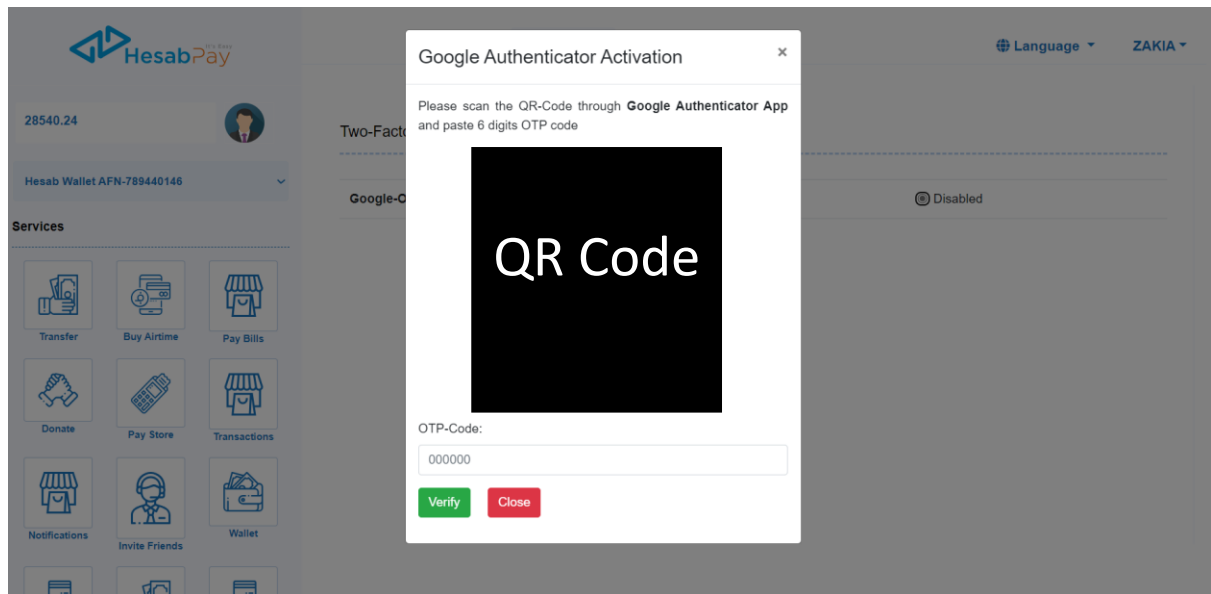
- Download the Google Authenticator app. Open the app and click on '**Scan a QR** code' After scanning this QR code with the Google Authenticator app, it will display a 6-digit OTP code. Enter the OTP code here to login.

1. User Management:

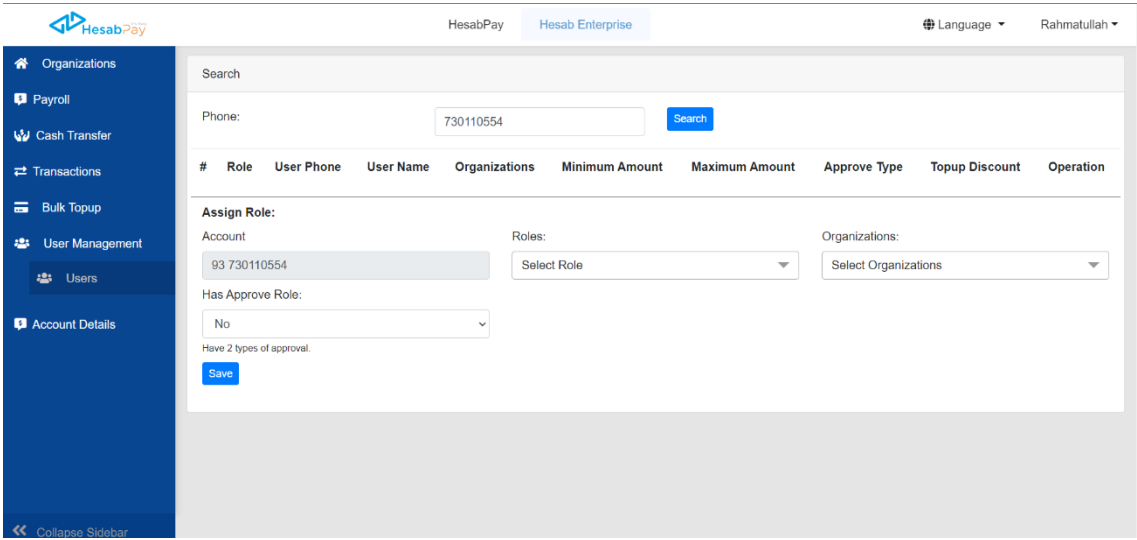The User Management feature empowers administrators with a dynamic tool to streamline the disbursement process. Through this feature, administrators can delegate approval roles to designated users within the organization, enhancing efficiency in financial workflows. This delegation encompasses two pivotal approval roles: Initial Approver and Final Approver. In practice, when an admin initiates a payroll period, the Initial Approver must first approve the period, followed by the Final Approver's confirmation. Only after obtaining these sequential approvals can the admin proceed with the disbursement process, ensuring a secure and organized financial operation within the enterprise.

Assigning Initial and Final Approver Roles:

- Log in to the Enterprise Dashboard with your administrator credentials.
- Navigate to the **User Management** section.
- For assigning roles, ensure that the users have HesabPay account. In the search field search the user by the **hesabpay phone number** or **email**.
- In the **Roles** section, find and select the appropriate roles for the user.
- In the **Organizations** section, locate and select the name of your organization from the provided list.
- In the **has approver role** section, select either "**initial approver**" or "**final approver**" based on the user's role requirements
- Click on the **save** button to apply the selected roles and organization to the user.

Note: For the final approval role, if you don't specify the minimum and maximum limits, the user can approve any amount. However, if you want to set limitations, you can assign up to three users to this final approval role. Based on the amount, each specific user will either approve or reject the request.

2. Payroll:

The payroll section in the HesabPay Enterprise Dashboard streamlines all payroll services for organizations. The payroll section serves as a centralized hub for executing, monitoring, and optimizing all payroll operations within the organization.
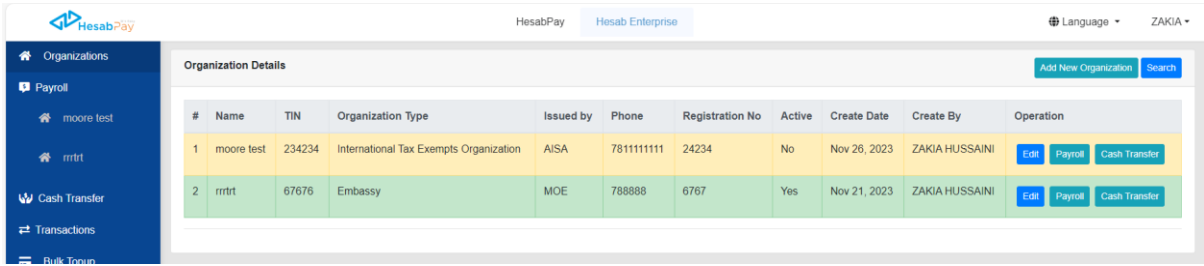
With its intuitive interface, comprehensive reporting capabilities, and secure payment features, the HesabPay Enterprise Dashboard's payroll section simplifies and enhances the entire payroll management process.

Step-by-Step Guide for Payroll:

Step 1
Creating an organization:
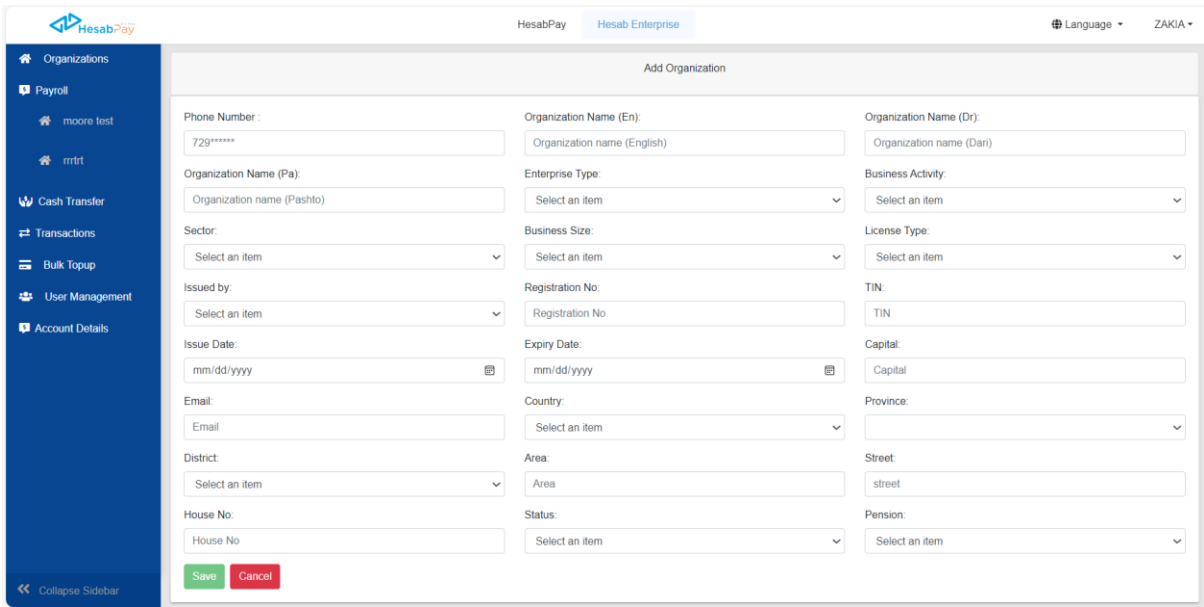
- navigate to the left menu and click on the "**organization**" section.
- Click on "**Add New Organization**".

- Fill in the required details of your organization.
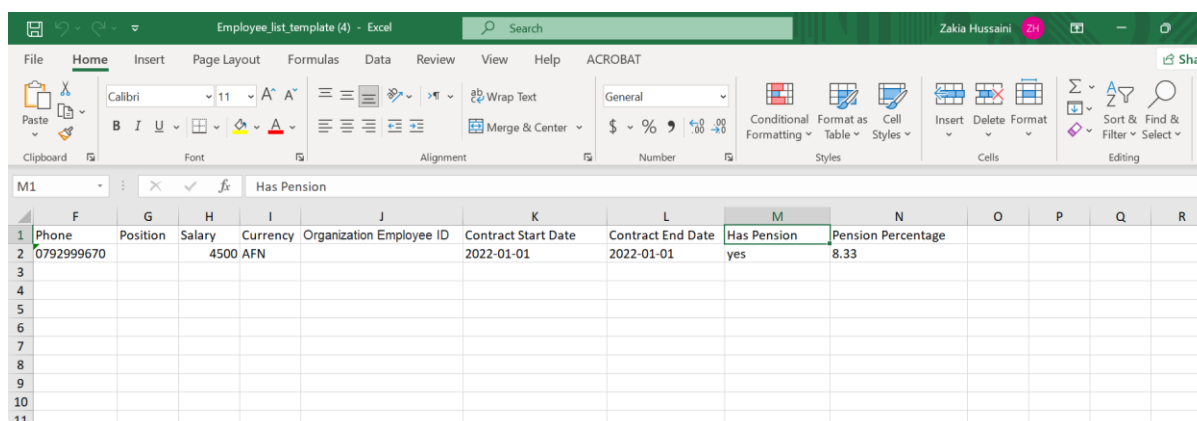- Click on "**save**" button.

Step 2

Managing Employees:

- After creating organizations, click on your organization.
- Navigate to the **Employee** Tab.
- Click on "**Download template**" to initiate the download of the template file. This file is in Excel format and serves as a structured document for inputting employee data.
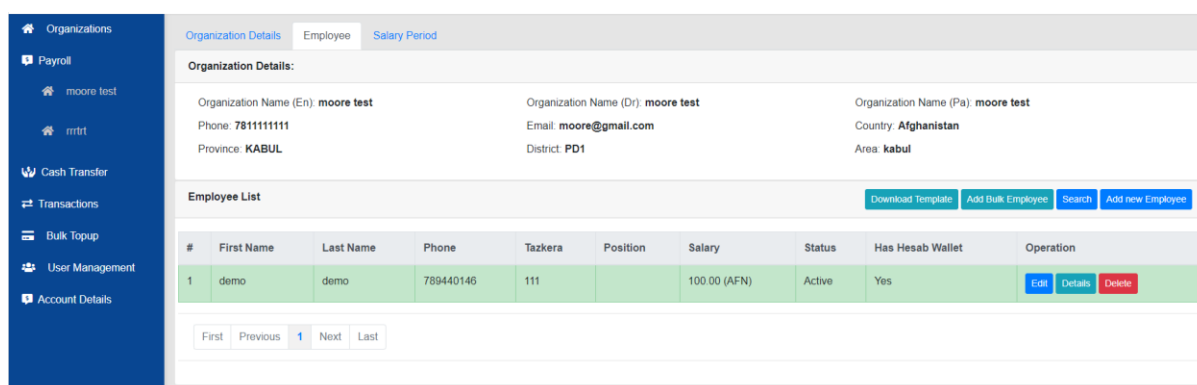

- Fill in the Template: Open the downloaded Excel template and populate it with the necessary employee information.
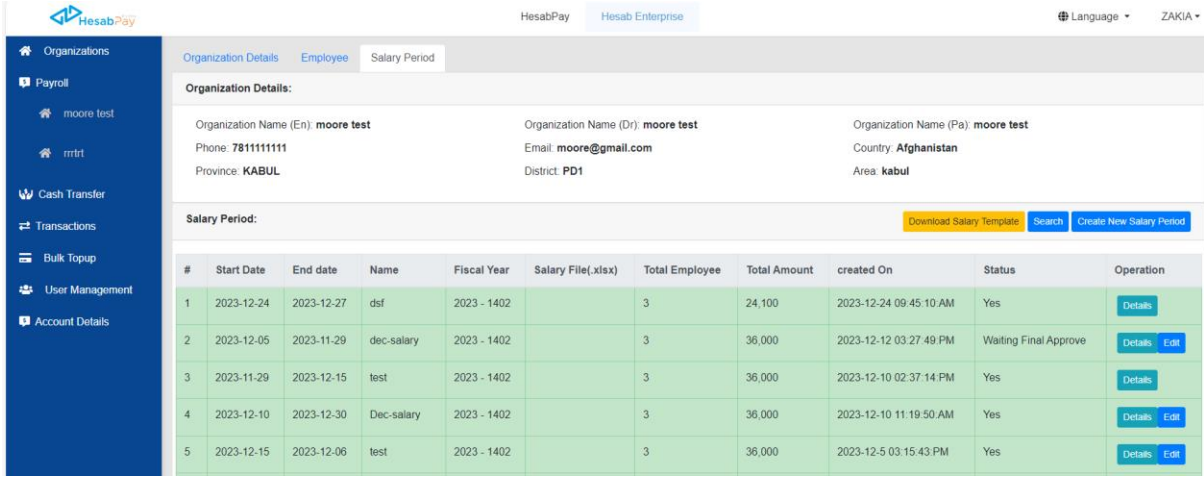

- Once you have filled in the template, return to the HesabPay Enterprise Dashboard and navigate to the "**Add Bulk Employee**" section. Upload the completed Excel template containing employee data.

- After refreshing the page, it will check all the employees' statuses and display them on the screen.

Step 3:
Creating Salary Periods

- Navigate to your organization and then click on "**salary period**".
- click on "**Create New Salary Period**".

- Enter the necessary details for the new salary period, such as start date, end date, etc.
- Once you have entered the period details, locate the "**Save**" button and click on it.
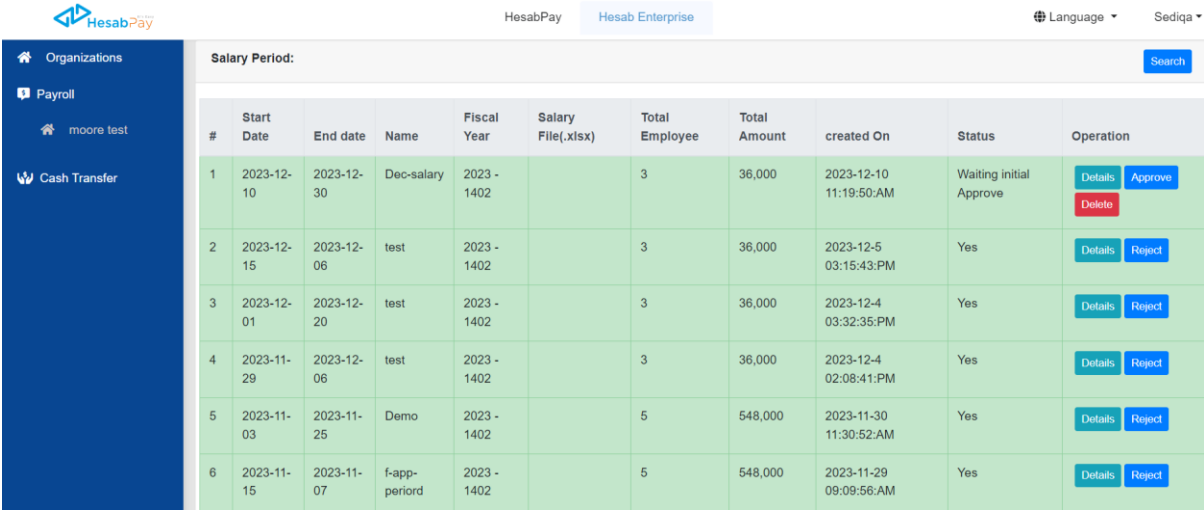

- After saving, you should see that the period status changes to "**Waiting Initial Approve**".
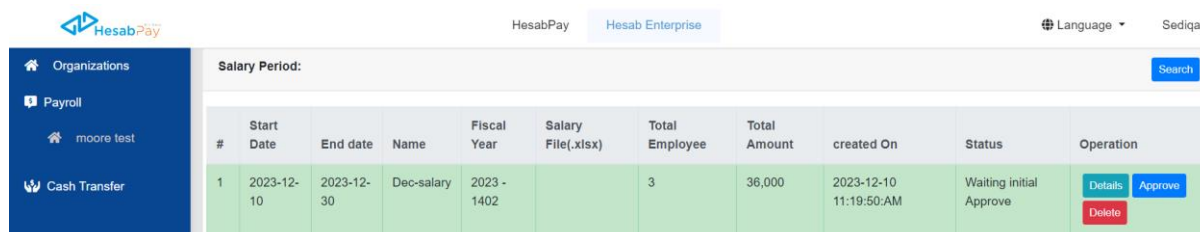
Step 4:

Approving a transaction (initial and Final Approval):

- When the admin creates a period, The users with the Initial and final Approver role receive a notification email when a disbursement request is initiated.
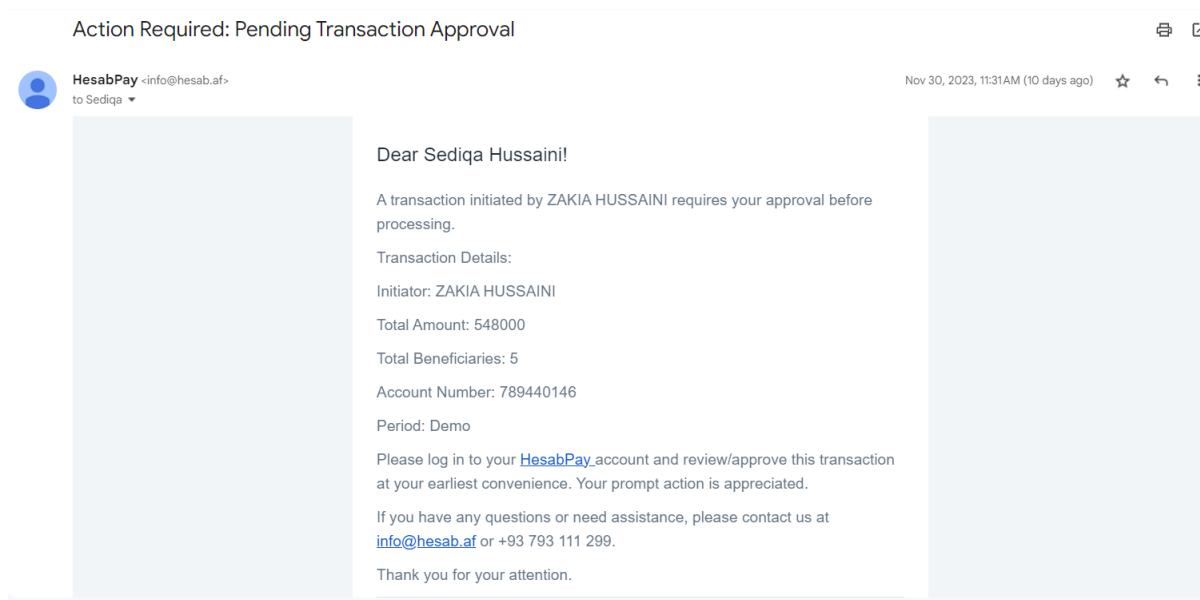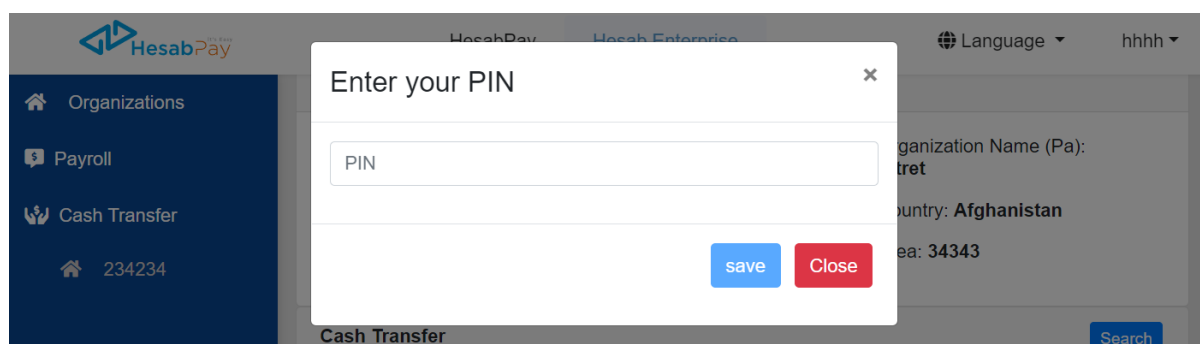

Initial Approval:

- The Initial Approver reviews the request and either approves or rejects it.

- After reviewing the request and deciding to approve it, the Final Approver will see an option to enter the **PIN**.
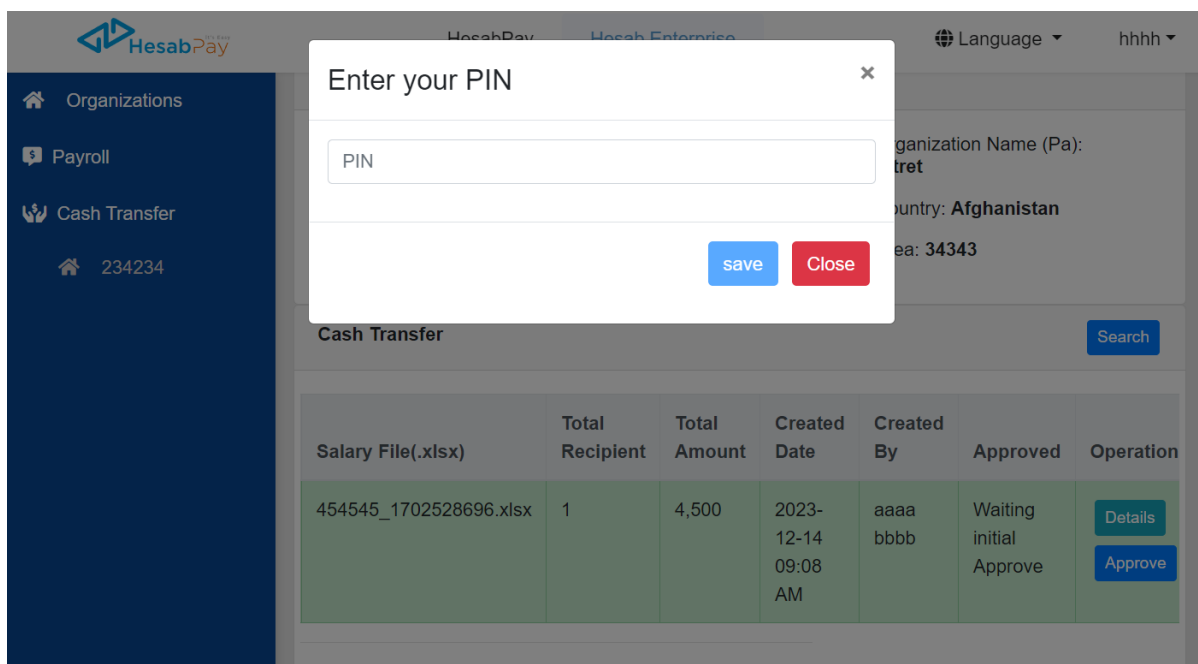- Enter you pin to approve the period.

Final Approval:

- If approved, the request moves to the Final Approver.
- The Final Approver reviews the request and can either approve or reject it.

- After reviewing the request and deciding to approve it, the Final Approver will see an option to enter the PIN.
- Enter you pin to approve the period.

Admin:

- If both approvals are received, the admin can proceed with the disbursement process.
- Click on the **detail** section.

- Now you can see the detail of the period. To make payments, click on **'Pay Salary'** button.

- for payments, select Wallet, enter pin and click on Transfer Button.
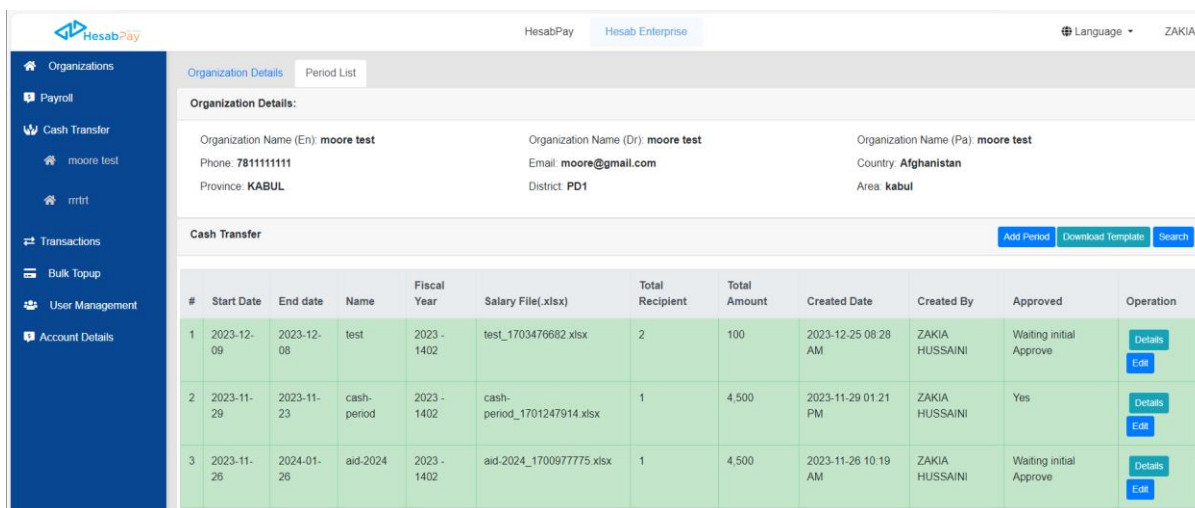
3. Humanitarian Aid or Cash Transfer

The Humanitarian Aid or Cash Transfer section within the HesabPay Enterprise Dashboard empowers you to efficiently transfer aid or cash to designated users. With intuitive controls and user-friendly interfaces, you can easily initiate and track aid transfers, ensuring that resources reach the intended recipients promptly and accurately.

Step-by-Step Guide for Initiating Cash Transfer:

Step 1:

Select Organization

- navigate to the **cash transfer** section. Here, select the organization for which you intend to initiate the cash transfer.
- Click on "**Period List**" tab.
- Click on "**Download Template**" to retrieve the Excel file that serves as the structured document for inputting necessary details related to the cash transfer.
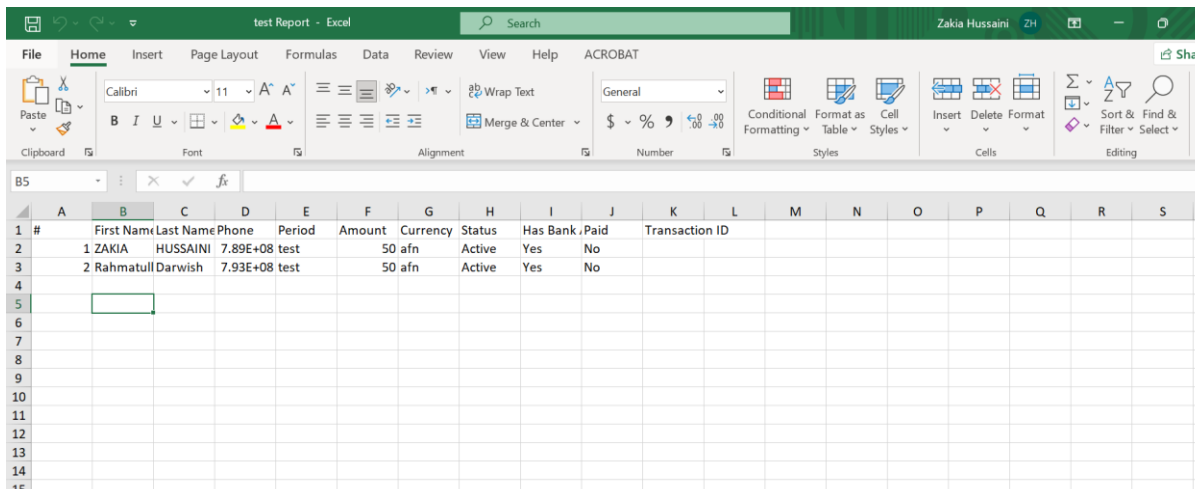

- Open the downloaded Excel template, and fill in all required details for the upcoming cash transfer.

- Click on "**add Period**".

- Enter the necessary details for the Period List, such as start date, end date, etc. for uploading the salary file click on "**salary file**".
- Then click on "**Save**" button.

- You can see the period in the period list. After creating the period, the period needs to be approved by initial approval and final approval before the final payment process.

- After the period is approved by initial approval and final approval, the approved status changes to the "**yes**".

Cash Transfer

Add Period | Download Template | Search

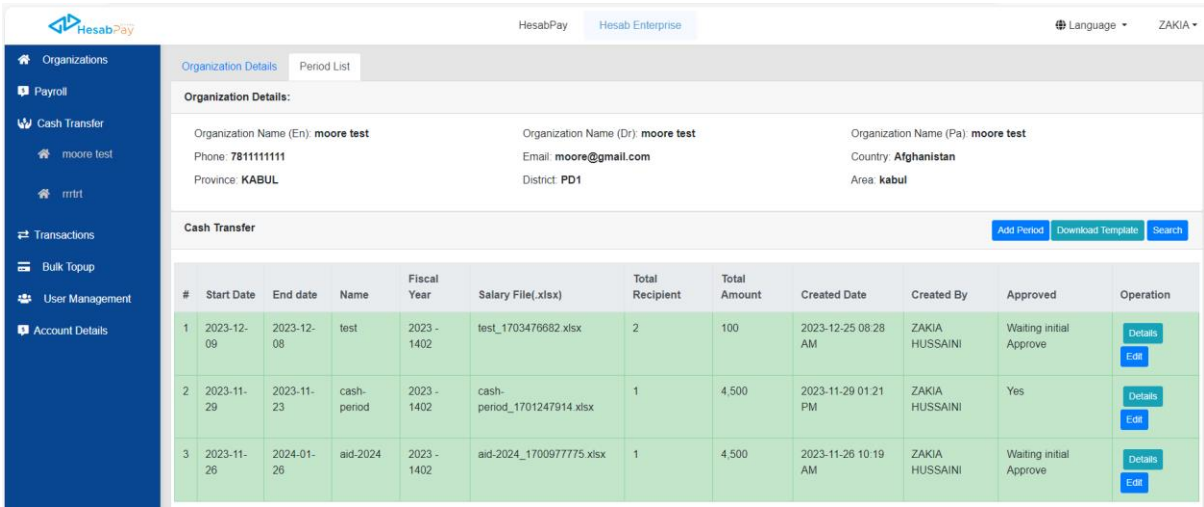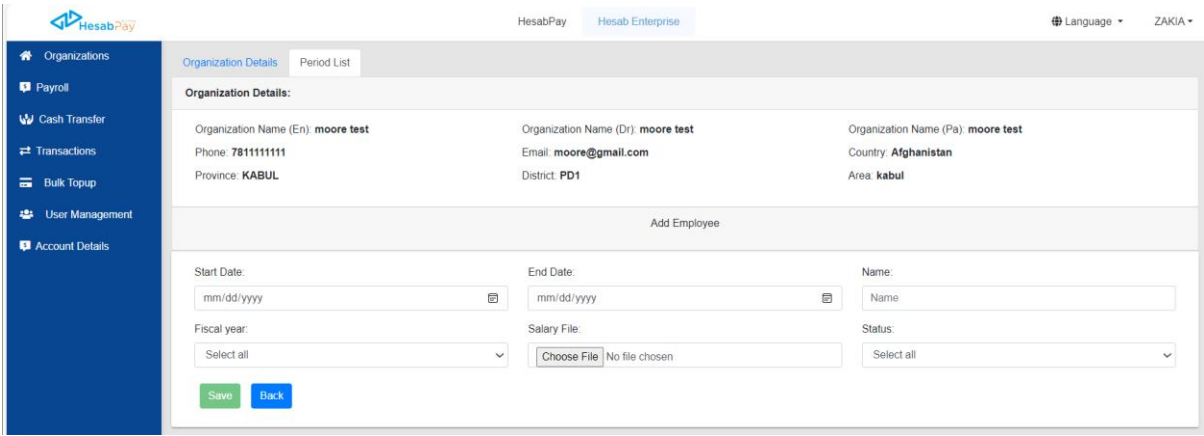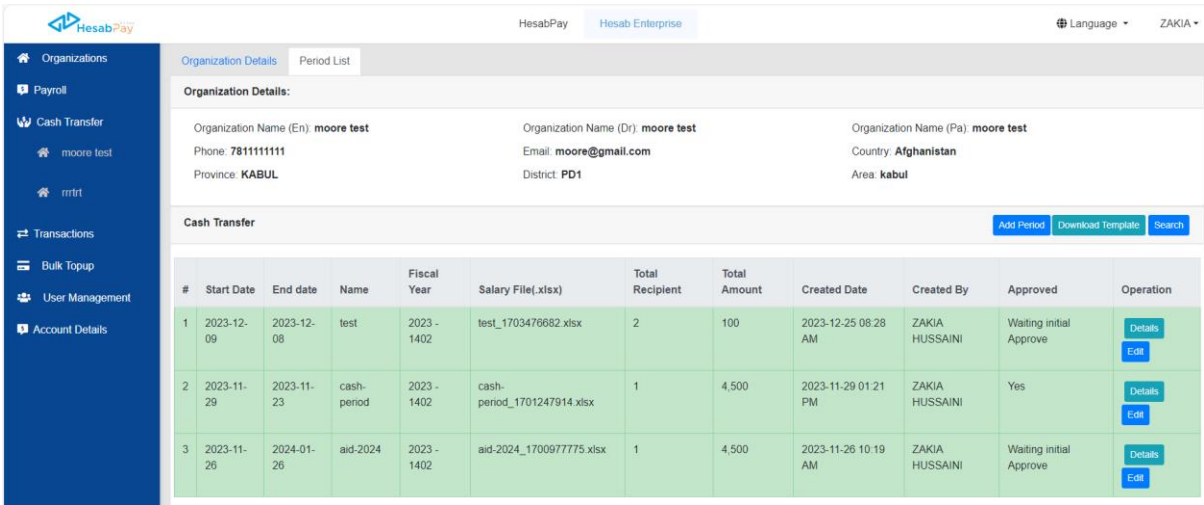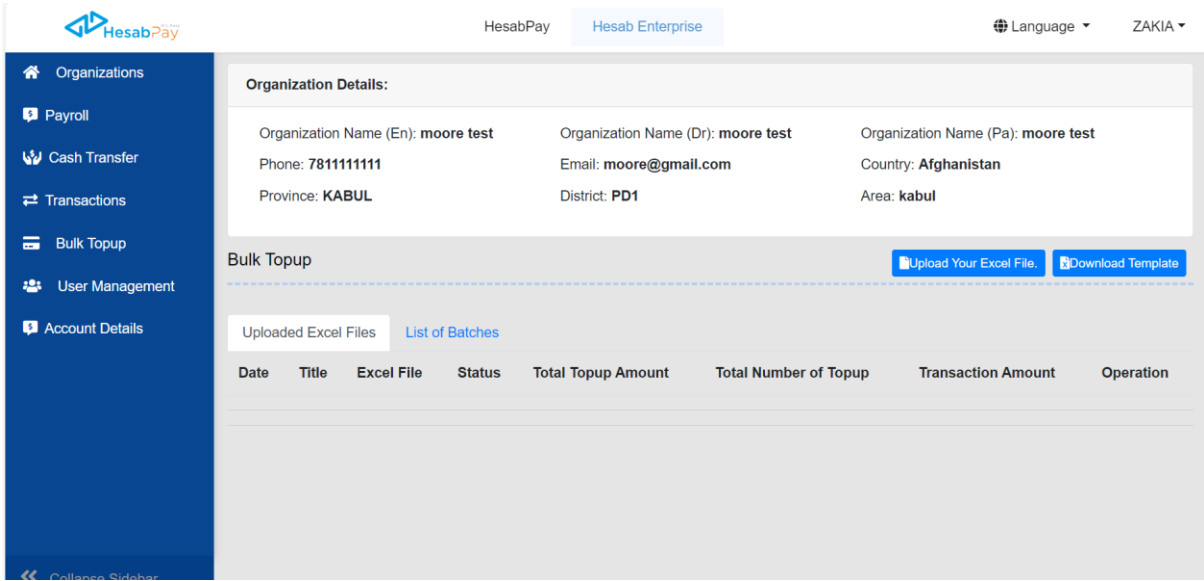| #	Start Date	End date	Name	Fiscal Year	Salary File(.xlsx)	Total Recipient	Total Amount	Created Date	Created By	Approved	Operation
1	2023-12-09	2023-12-08	test	2023 - 1402	test_1703476682.xlsx	2	100	2023-12-25 08:28 AM	ZAKIA HUSSAINI	Yes	Details Edit
2	2023-11-29	2023-11-23	cash-period	2023 - 1402	cash-period_1701247914.xlsx	1	4,500	2023-11-29 01:21 PM	ZAKIA HUSSAINI	Yes	Details Edit
3	2023-11-26	2024-01-26	aid-2024	2023 - 1402	aid-2024_1700977775.xlsx	1	4,500	2023-11-26 10:19 AM	ZAKIA HUSSAINI	Waiting initial Approve	Details Edit

- Click on "**Details**" to seeing the details and payment process.

Employee Aid List:

Export Outgoing Report | Export Excel | Search

#	Phone	Payment Period	Amount	Currency	Has Hesab Wallet	Status	Paid	Response Message	Alternative	Alternative Status	Operation
1	792999670	test	50.00	AFN	Yes	Active	No		N/A	N/A	Delete
2	789440146	test	50.00	AFN	Yes	Active	No		N/A	N/A	Delete

First | Previous | 1 | Next | Last

Pay Aid | Back

- For payment, click on "**Pay Aid**".

Enter Card info   ×

Total disburse amount: **100.00**   Total active employee to disburse: **2**

Hesab Wallet: Hesab Wallet 789440146 (29540.24 AFN)
Wallet PIN: ••••

Transfer | Close

Language ▾ | ZAKIA ▾

Employee

Export Outgoing Report | Export Excel | Search

#	Phone	Payment Period	Amount	Currency	Has Hesab Wallet	Status	Paid	Response Message	Alternative	Alternative Status	Operation
1	792999670	test	50.00	AFN	Yes	Active	No		N/A	N/A	Delete
2	789440146	test	50.00	AFN	Yes	Active	No		N/A	N/A	Delete

4. Bulk Topup:

The Bulk Topup feature within the HesabPay Enterprise Dashboard offers an efficient solution for administrators to transfer airtime credit from their accounts to a designated list of phone numbers.
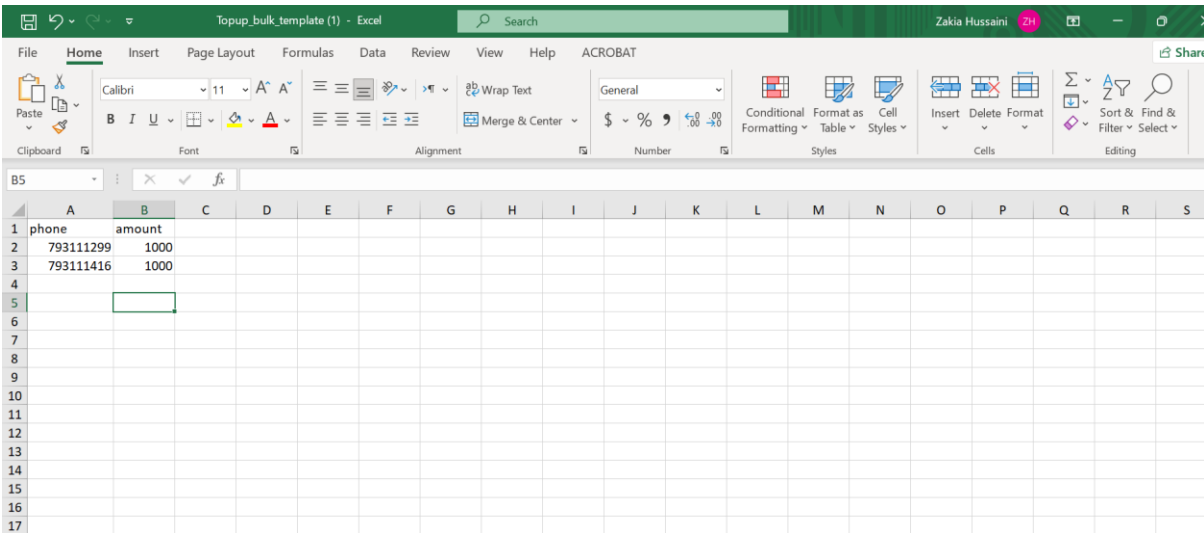
Steps:

- From the sidebar, choose the "**Bulk Topup**" section and select the specific organization for which you want to perform the Bulk Topup.
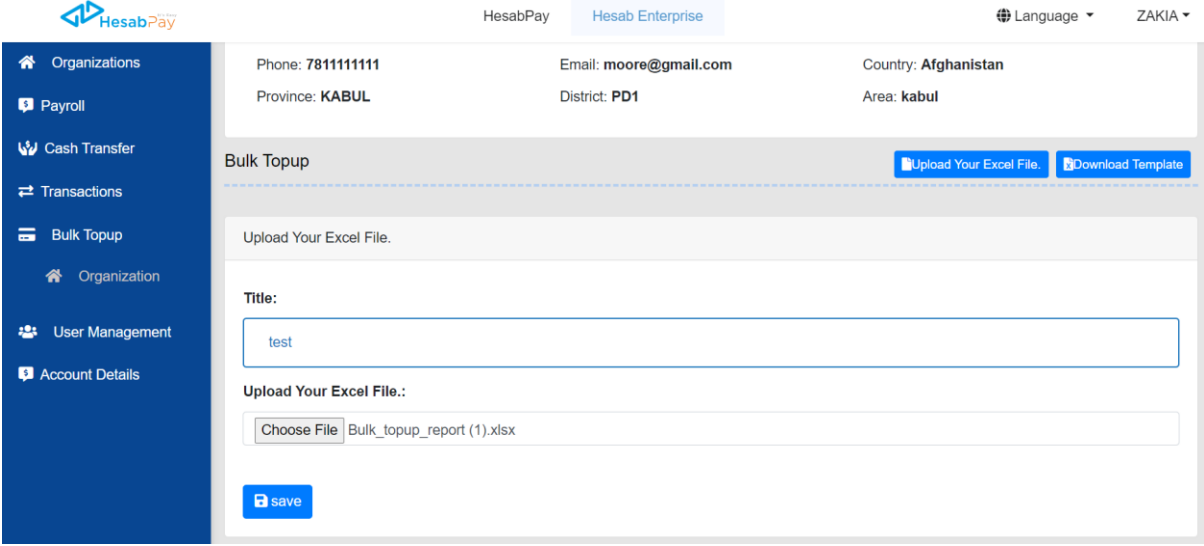
- Inside the Bulk Topup section, click on "**Download Template**."
- Open the downloaded Excel template. Fill in the required details, including the phone numbers and the corresponding top-up amounts for each user.
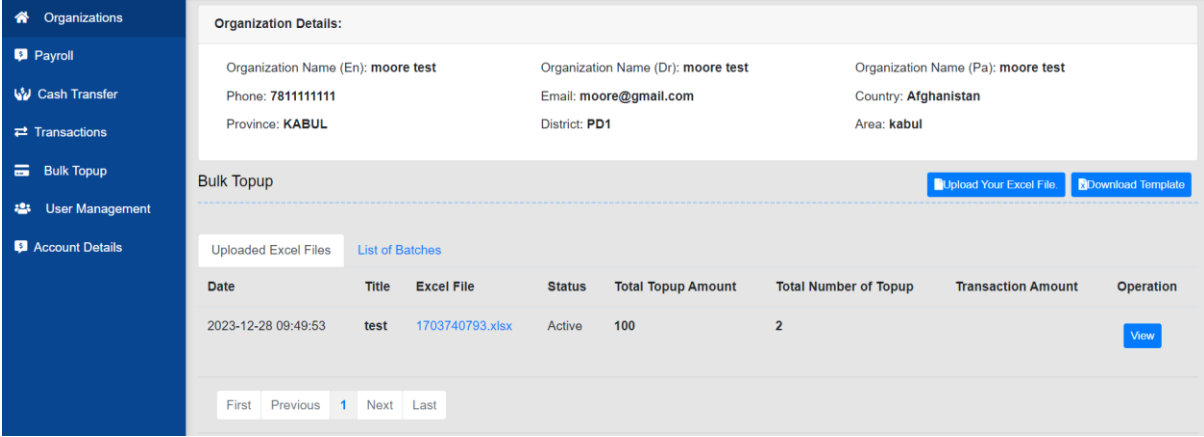
- After filling in the details, Go back to the Bulk Topup section in the Enterprise Dashboard. Click on "**Upload Your Excel File**".
- Enter the "**Title**" and click on "**Choose File**" and select the filled Excel file.
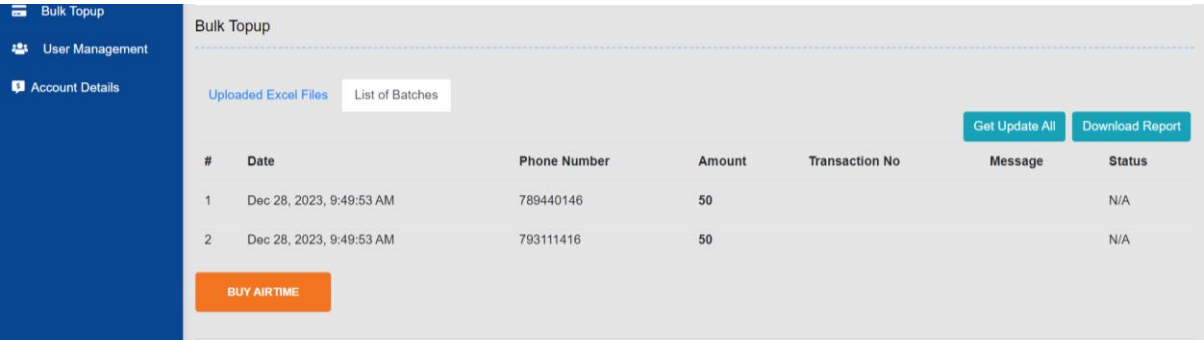- Click the "**save**" button.

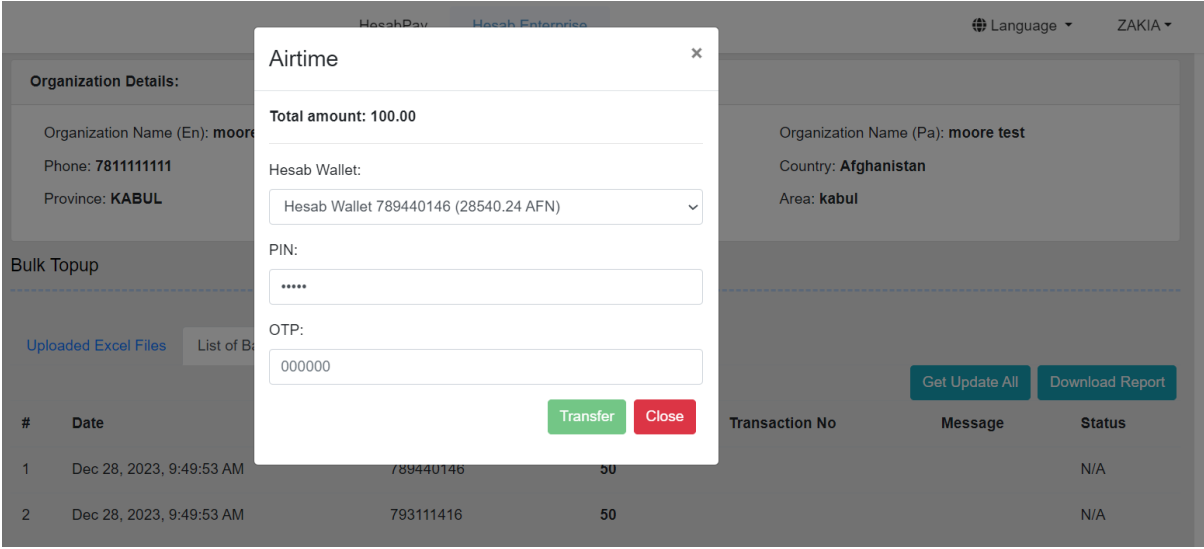- You will find the uploaded Excel file. For more details, click on **'View'**.

- You have the details of the uploaded file, and by clicking on **'Buy Airtime**' you can purchase top-up for the list of phone numbers.

- In this step, select the wallet option and enter the PIN and OTP to send credits to the list of phone numbers.
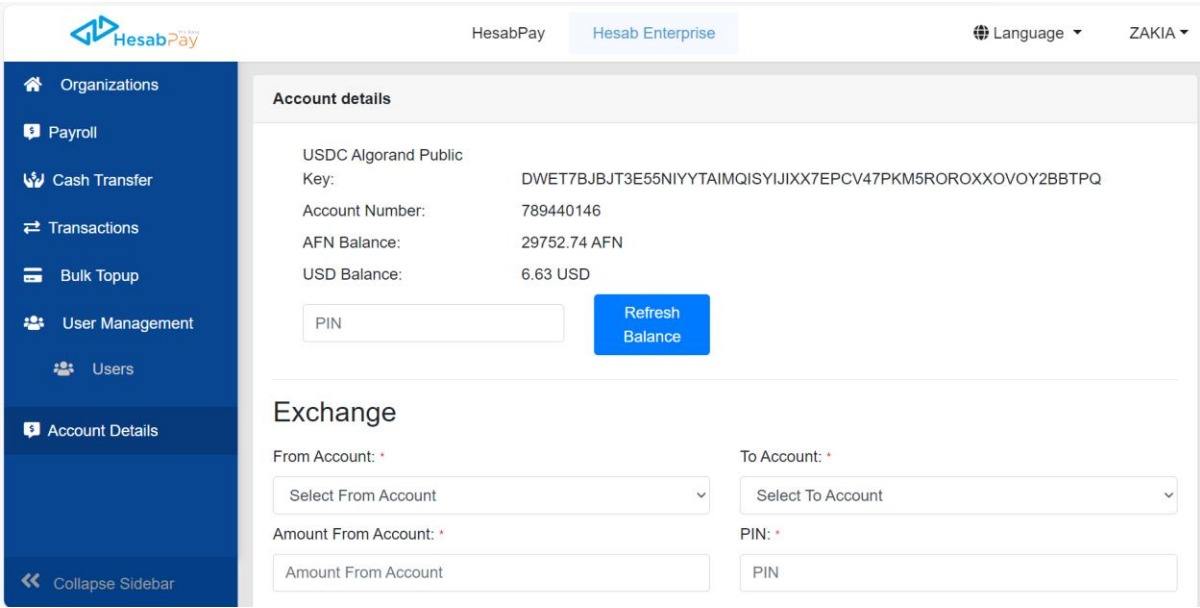

5. Account Details

The Enterprise Dashboard now features an enhanced Exchange page, allowing users to seamlessly convert USDC to AFN functionality includes real-time exchange rates.

5.1 Visibility of USDC Public Key:

The **Algorand account public key** is the address to which everyone can transfer USDC from third-party platforms.

5.2 Currency Exchange

This update allows users to exchange money between USD and AFG wallets, providing greater flexibility.

Steps:

- Navigate to **Account Details**
- Go to the "**Exchange**" section.
- In the "**From account**" section, Choose the source currency (USD or AFG) and in the "**To account** "target currency (AFG or USD) for the exchange.
- Enter the amount you wish to exchange.
- Review the exchange details, including the conversion rate
- Enter your **pin** and click on the **Transfer** button.