zymDev

SOFTWARE FACTORY

Flow 365

Comprehensive ERP management: payroll, clients, contracts, departments, and inventory.

Official User Manual

zymDev Core Platform v5.5.2

Issue Date: 2026-09-13

Table of Contents

Comprehensive ERP management: payroll, clients, contracts, departments, and inventory.

📥 **Download:** Download User Manual in PDF

📚 Available Modules & Functionalities

Below are the modules and views available in **Flow 365**:

📁 System Configurations

View	Submodule	Description	Link
Departments	-	The Department Structure view is the administrative module in charge of prioritizing the work areas of the organization and managi...	Open Manual
Physical Infrastructure & Mapping	-	The Physical Mapping and Infrastructure suite is the set of ERP submodules responsible for digitally modeling the assets and physi...	Open Manual
System Instruments	-	The Instrument Configuration view (or Instruments) is the module in charge of registering, cataloging and integrating the physical...	Open Manual

📁 General

View	Submodule	Description	Link
Client Management	-	The Client Management view is the ERP module intended to register and manage the accounts of corporate clients or natural persons...	Open Manual
Constants & Enums	-	The Constants (or Enums) Management view is the platform's technical module designed to manage lists of predefined values that f...	Open Manual
Contact Information	-	The Contact Information view in the CMS is the module where the customer service channels, institutional telephone numbers, WhatsA...	Open Manual
Default Options	-	The Default Options view is the system's analytical configuration section that allows coordinators and administrators to define de...	Open Manual

View	Submodule	Description	Link
Payroll Management	-	The Payroll Management view (or ERP Payroll) is the module in charge of processing, auditing and monthly approval of the fees and...	[Open Manual]
Release Notes & Changelogs	-	The Release Notes (or Changelogs) view is the official communication channel within the platform that details updates, improvement...	[Open Manual]

System Tools

View	Submodule	Description	Link
Audit Log	-	The Audit Log view (or Logs) is the system's security and traceability tool responsible for chronologically recording all operatio...	[Open Manual]
Communication Templates	-	The Template Management view is the system tool designed to centralize, design and manage the communication formats and documents...	[Open Manual]
Incidents & Support	-	The Incident Management view is the centralized module for recording, reporting and tracking incidents, errors or requests for new...	[Open Manual]
Maintenance Scripts	-	The Script Console is an advanced level maintenance and support tool within the ERP, designed for the controlled execution of sche...	[Open Manual]

CMS Modules

View	Submodule	Description	Link
About Us	-	The About Us view in the CMS is the administrative module in charge of managing the main institutional content displayed on the pu...	[Open Manual]
Consumers & Success Stories	-	The Consumer view in the CMS is the module in charge of managing the list of featured clients, success stories and institutional t...	[Open Manual]
Contact Information (CMS)	-	The Contact Information view in the CMS is the module where the customer service channels, institutional telephone numbers, WhatsA...	[Open Manual]

View	Submodule	Description	Link
Digital Products (CMS)	-	The Digital Products view in the CMS is the module that manages the catalog of software, applications, licenses or digital solutio...	Open Manual
FAQs	-	The Frequently Asked Questions (FAQs) view in the CMS is the manageable module designed to parameterize the common questions, quic...	Open Manual
Partnerships & Alliances	-	The Associations and Alliances view in the CMS is the module in charge of managing the catalog of agreements, strategic allies and...	Open Manual
Published Services (CMS)	-	The Published Services view in the CMS is the module where the offer of technological, professional or consulting services display...	Open Manual

General Modules

View	Submodule	Description	Link
Countries & States	-	The Country and State Configuration view is the module in charge of parameterizing the territorial division and geographic locatio...	Open Manual
Memberships & Licenses	-	The Membership Administration view is the module in charge of managing the licensing and payment plans applied to the different or...	Open Manual
Organizations	-	The Organization Administration view is the centralized module where the different legal or commercial entities registered in the...	Open Manual
Roles & Permissions	-	The Roles and Permissions Management view is the security module that allows you to define the access levels and privileges of use...	Open Manual
System Attributes	-	The Custom System Attributes view is the advanced management console designed to structure, customize, and manage the general dyna...	Open Manual
System Languages	-	The System Languages view is the internationalization administrative console (i18n) in charge of creating, consulting, editing a...	Open Manual

View	Submodule	Description	Link
System Menus & Navigation	-	The System Menus view is the navigation architecture console responsible for configuring, creating, editing, deleting and exportin...	Open Manual
System Products	-	The System Products view is the administrative console in charge of the general administration of platform products and applicatio...	Open Manual
System References	-	The System References view is the administrative console in charge of consulting, registering, editing and deleting global system...	Open Manual
Tag Management	-	The Tag Management view is the module in charge of creating, consulting, editing, deleting and exporting visual tags for general s...	Open Manual
User Management	-	The User Administration view is the section of the platform that allows you to control the access of staff and collaborators to th...	Open Manual

📁 Control Panel

View	Submodule	Description	Link
Collaborator Contracts	-	The Collaborator Contract Management (or User Contracts) view is the ERP module intended for the registration, salary control and...	Open Manual
Device Inventory & Hardware	-	The Device Inventory (or Hardware Management) view is the ERP module in charge of controlling, pricing and assigning technological...	Open Manual
Expense Reimbursements	-	The Refund Management view is the ERP module in charge of processing, auditing and legalizing requests for refunds for representat...	Open Manual
Project Users Assignment	-	The User and Project Linking view is the ERP section designed to manage the allocation of the organization's human capital to the...	Open Manual
Projects	-	The Project Management view is the central ERP module that allows you to record and parameterize the operations and assignments of...	Open Manual

View	Submodule	Description	Link
Time Tracking	-	The Time Tracking view is the ERP module designed to record and control the work hours invested by collaborators in the organizati...	Open Manual

Views and Functionalities Catalog

Department Structure

Description, Purpose and Objective

> **NOTE:** The **Department Structure** view is the administrative module in charge of prioritizing the work areas of the organization and managing the logical and digital infrastructure assigned to each of them.
>
> A **Department** is an operational subdivision within the organization. The system allows defining hierarchical subordination relationships by assigning a **Main Department** (or Mother Area, allowing subdepartments or dependent sections). Each department is coded with a unique **Suffix** and has inherited or automatically assigned email channels and storage infrastructure (**Google Drive**).
>
> The objective of this view is to model the company's operational organization chart, facilitating the assignment of personnel to their areas of belonging, decentralized document management and access control.

Context of Use

This module is used by the Human Resources and Infrastructure area to:

- **Design the organization chart:** Record the hierarchical structure of the organization (e.g. create the *Software Engineering* department dependent on *Technology*).
- **Assign communication and storage channels:** Consult and structure Drive folders created for the exclusive use of staff in each area.
- **Classify personnel:** Serve as a basis for assigning departments to users during their registration or editing on the platform.

Possible Actions

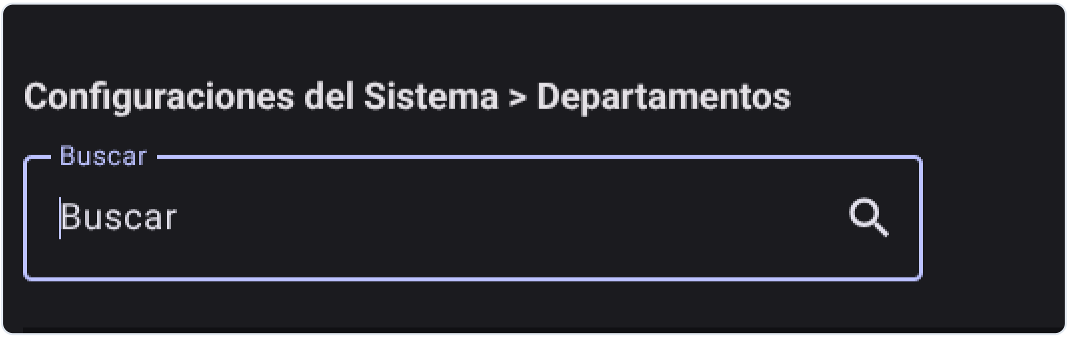
1. Consult and Search Departments

Displays the complete list of departments in a table structured with the following data:

- **Name:** Descriptive name of the area.
- **Main department:** Hierarchical relationship or department on which the area depends.
- **Suffix:** Identification acronym of the department.
- **Group name:** Technical identifier of the associated group.
- **Email and Email of the administrator:** Contact addresses assigned to the area.

- **Drive Folders:** Direct links to department directories in Google Drive (*Main Drive, Department Drive, Administrator Drive, Public Drive, and Area Drive*).
- **Registration Date:** Creation date in the system.

The search bar allows you to quickly locate departments by name or suffix.

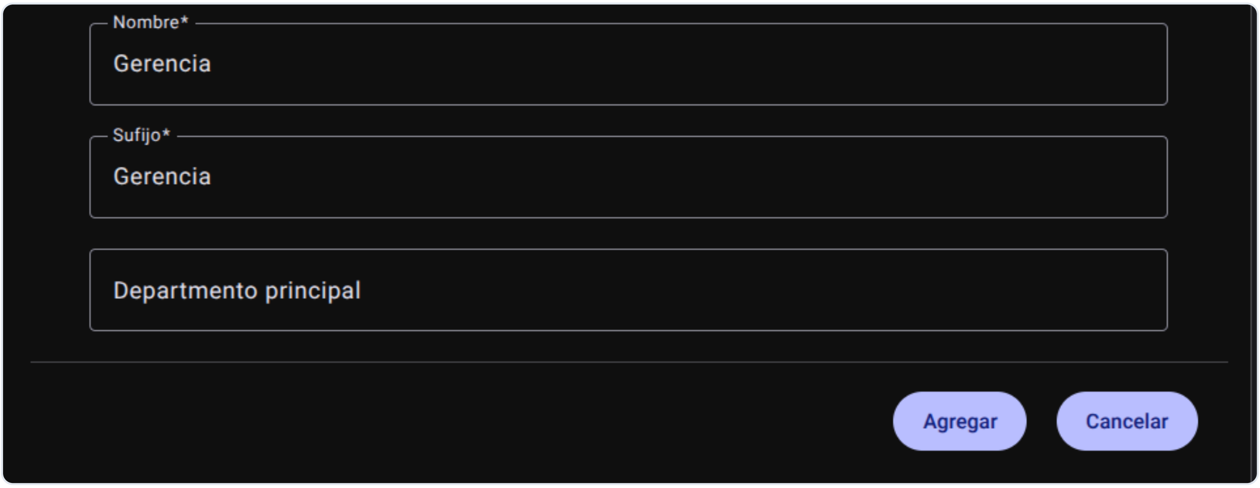


2. Add a Department

To incorporate an area or division into the organization:

1. Click **"Add Department"** at the top right.

2. Fill out the lateral form with the required fields:
   - **Name:** Enter the descriptive name of the new department (e.g. *Technical Support*).
   - **Suffix:** Enter the abbreviated area identifier code (e.g. `SOP`).
   - **Main department:** If the new area is part of a larger division, start typing the name of the top department and select it from the auto-complete list. If it is a root area, leave this field empty.



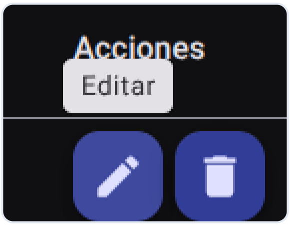
3. Click **"Add"** to confirm registration.

> **NOTE:** When you add a department, the system automatically generates its Google Drive folders and mailing lists based on the name and suffix structure. These fields will be displayed in the table after background processing is completed.

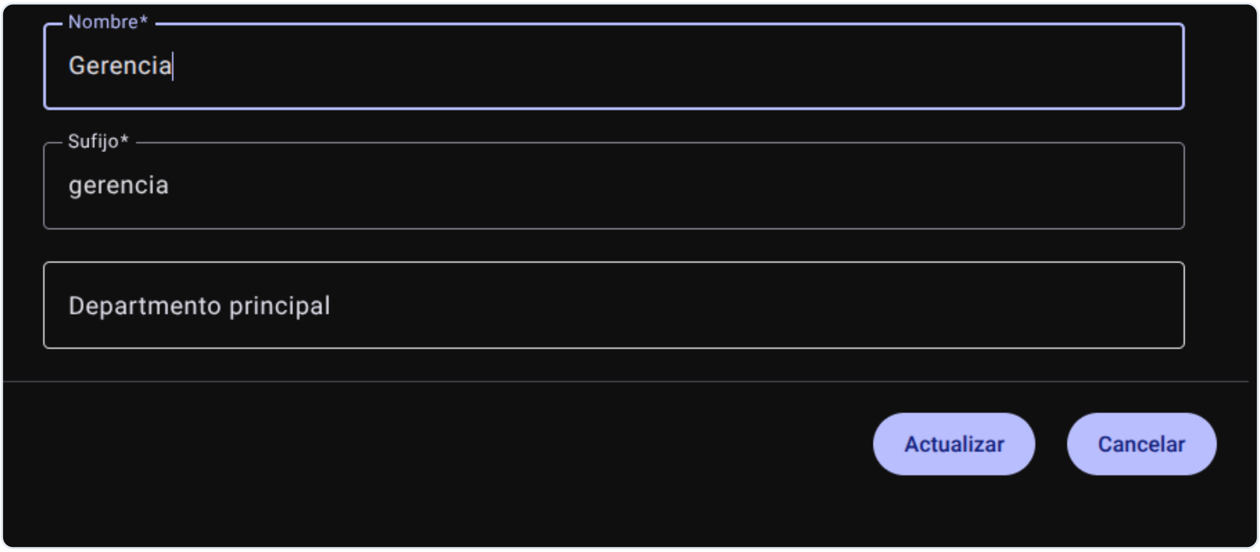
3. Edit a Department

To modify the basic parameters of an area:

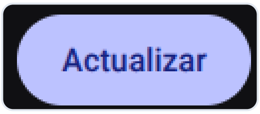
1. Click the **"Edit"** button (pencil icon ✏️) in the department row.



2. In the side form, modify the name, suffix or change its hierarchical dependency by reassigning the parent department.



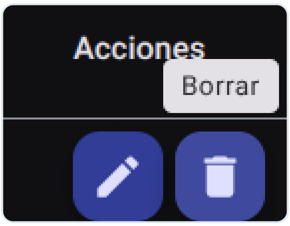
3. Click **"Update"** to apply the changes.



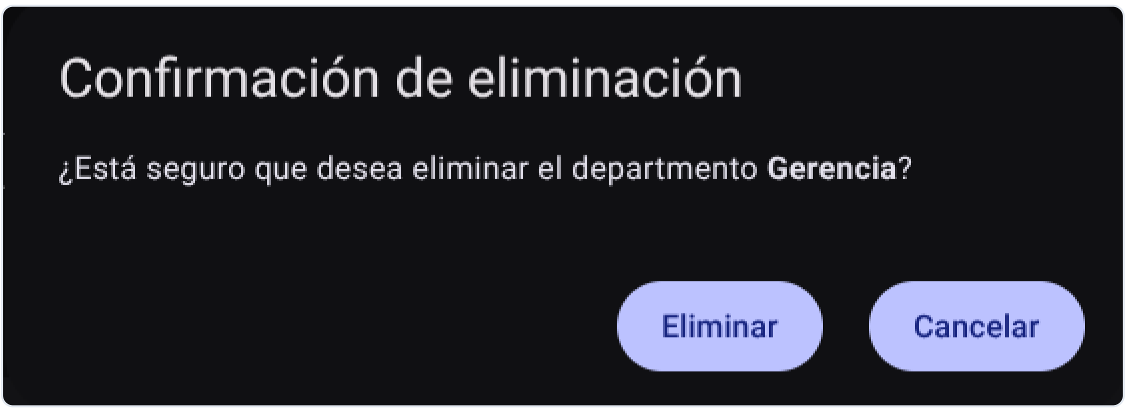
4. Delete a Department

To permanently delete a division from the chart:

1. Click the trash icon ( ) of the department you want to check out.



2. Confirm the action in the dialog box.

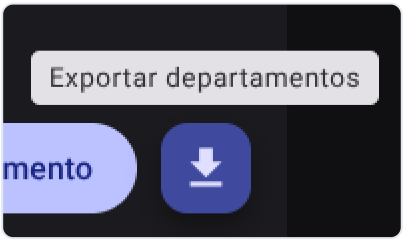


> **CAUTION:** The system will block the deletion of the department if it contains associated internal users, active dependent subdepartments, or if it is referenced in current personnel contracts. You must reassign these

> personnel and subareas to other departments before proceeding with the deletion.

5. Export Department Catalog

Click the top right download button to export the department database, including its Drive storage links and associated emails, in **.CSV** file format.



Required Technical Permits

Access to the hierarchical structure is restricted by the following role permissions:

- `departments_read` : Allows you to enter the view, list and search for departments.
- `departments_create` : Enables the action of adding new departments.
- `departments_update` : Grants access to field editing of names, suffixes, and hierarchical remapping.
- `departments_delete` : Allows you to delete departments from the general organization chart.
- `departments_export` : Authorizes the download of the list in `.CSV` format.

Physical Mapping and Infrastructure

Description, Purpose and Objective

> **NOTE:** The **Physical Mapping and Infrastructure** suite is the set of ERP submodules in charge of digitally modeling the assets and physical spaces of the organization for its correct management of resources, assignment of jobs and inventory.
>
> The physical infrastructure is hierarchized into four logical levels:
>
> 1. **Buildings:** The infrastructure or main headquarters (defined by *Name* and *Address*).
> 2. **Floors:** Levels built into each building (linked to a specific *Building* and identified by a *Number*).
> 3. **Floor Sections:** Physical subdivisions or wings within a floor (for example, *North Wing*, *Section A*).
> 4. **Offices:** The physical spaces or delimited rooms intended for daily work, identified by their *Name*, *Section*, *Capacity* of positions and occupancy status or *In use?*.
>
> The objective of these modules is to centralize the spatial distribution of the organization, allowing the physical location of collaborators and assigned hardware to be precisely mapped.

Context of Use

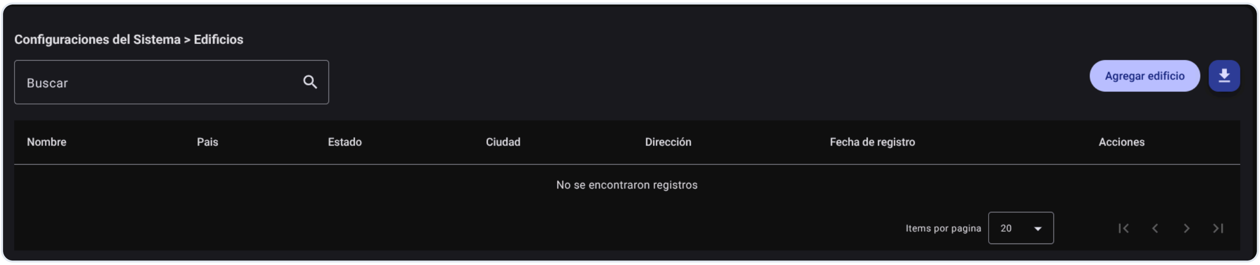
This set of views is operated by general services, IT, and infrastructure managers to:

- **Register headquarters or branches:** Add new buildings and offices as the company expands its physical operations.
- **Plan capacity and spaces:** Configure the maximum capacity of office positions before assigning personnel or scheduling hybrid work modalities.
- **Manage hardware inventory:** Provide exact location reference for tracking the physical inventory of computers and network devices.

Possible Actions per Submodule

1. Building Management

Allows you to manage the main physical offices.

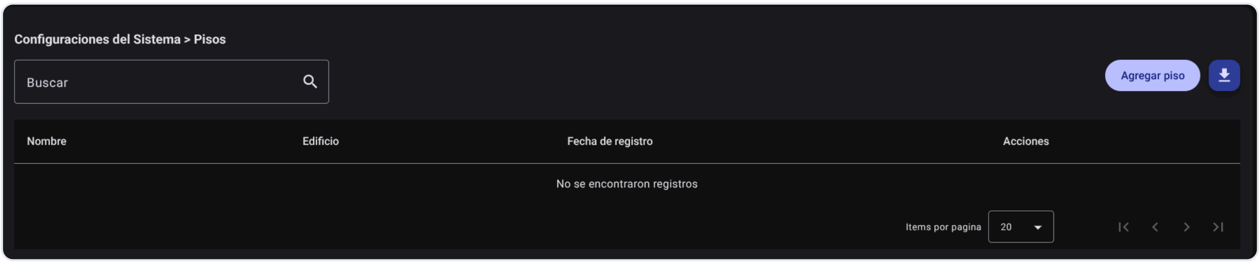


- **List and Search:** Shows the list of buildings with their name and address.
- **Add Building:** Click **"Add Building"** and enter the *Name* and *Address*.
- **Edit Building:** Allows you to update the address or correct the name.
- **Delete Building:** Deletes the building record.

> **CAUTION:** The system will not allow you to delete a building if it has active registered floors or units inside it.

2. Floor Management

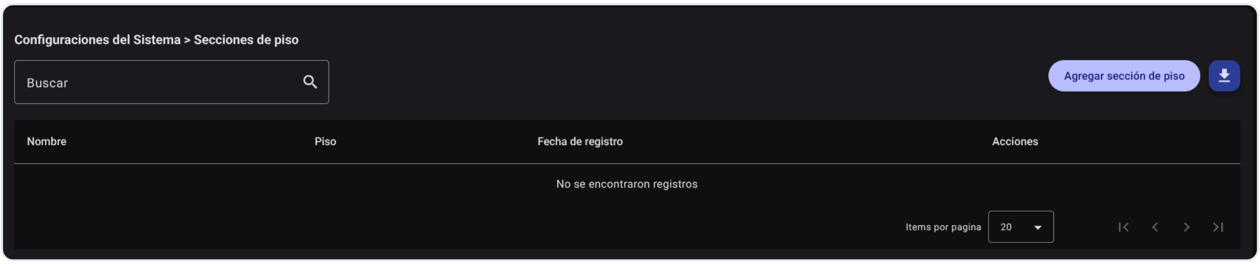
Allows buildings to be subdivided vertically.



- **List and Search:** Shows the list of apartments, indicating the number and the building to which they belong.
- **Add Floor:** Click **"Add Floor"**, enter the *Name* (e.g. *Floor 3*), the *Floor Number* (`3`) and select the corresponding *Building* from the auto-complete list.
- **Edit Floor:** Allows you to reassign the number or move the floor to another building.
- **Delete Floor:** Eliminates the vertical division. Requires that you have no registered floor sections.

3. Floor Section Management

Allows you to define the horizontal zones of each level.

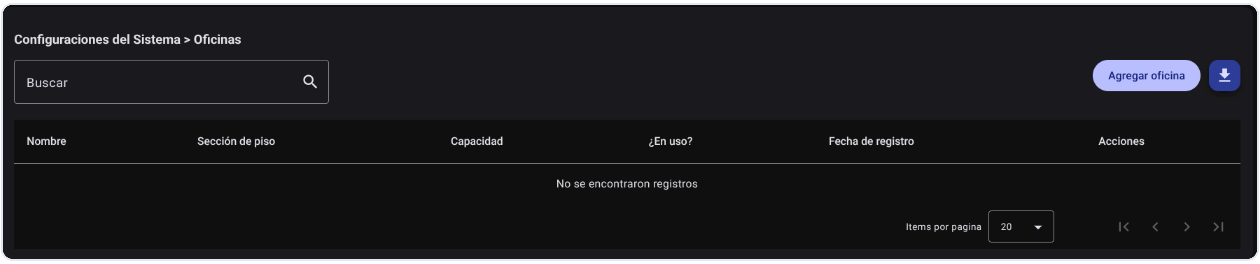


- **List and Search:** Shows the sections configured by floor.

- **Add Section:** Click **"Add Section"**, enter the *Name* of the section (e.g. *West Wing*) and select the corresponding *Floor* and *Building*.
- **Edit Section:** Change the name or link to the apartment.
- **Delete Section:** Removes the section as long as it does not contain registered offices in it.

4. Office Management

It allows you to define the final work spaces and their capacity.



- **List and Search:** Displays the name of the office, its corresponding floor section, its maximum staff capacity, and whether it is **In use?** (currently occupied by assigned collaborators).
- **Add Office:**
    1. Click **"Add Office"**.
    2. Enter the *Name* of the space (e.g. *Office 402 - Development*).
    3. Select the corresponding *Floor Section* using the autocomplete search engine.
    4. Define the maximum *Capacity* (integer number of available seats).
    5. Click **"Add"** to confirm.
- **Edit Office:** Allows you to modify the name, capacity or section in the side panel.
- **Delete Office:** Deletes the physical office if it does not have assigned personnel in the user database or inventoried hardware inside.

5. Export Infrastructure Catalog

In each of the corresponding tables, click on the download icon (upper right download) to export the Buildings, Floors, Sections or Offices database in **.CSV** format for physical capacity audits.

Required Technical Permits

Access to these modules requires having the following privilege keys in the user's role profile:

- **Buildings:** `buildings_read`, `buildings_create`, `buildings_update`, `buildings_delete`, `buildings_export`.
- **Floors:** `floors_read`, `floors_create`, `floors_update`, `floors_delete`, `floors_export`.

- **Floor Sections:** `sections_read`, `sections_create`, `sections_update`, `sections_delete`, `sections_export`.
- **Offices:** `offices_read`, `offices_create`, `offices_update`, `offices_delete`, `offices_export`.

Instrument and Analyzer Configuration

Description, Purpose and Objective

> **NOTE:** The **Instrument Configuration** (or Instruments) view is the module in charge of registering, cataloging and integrating the physical analyzer equipment and diagnostic readers that operate in the organization's processing centers.
>
> An **Instrument** on the platform represents the digital record of a real medical-analytical device. It is characterized by a personalized **Name** (alias assigned by the organization to identify the equipment, e.g. *Cobas 1 Chemistry Analyzer*) and the base **Instrument Model** selected from the system's global catalogue, which includes brand, manufacturer and communication specifications.
>
> The objective of this view is to create the laboratory's analytical hardware inventory, allowing the Quality Control Tests to be mapped with the corresponding physical analyzers and lay the foundations for the automatic communication of results via API or HL7 protocol.

Context of Use

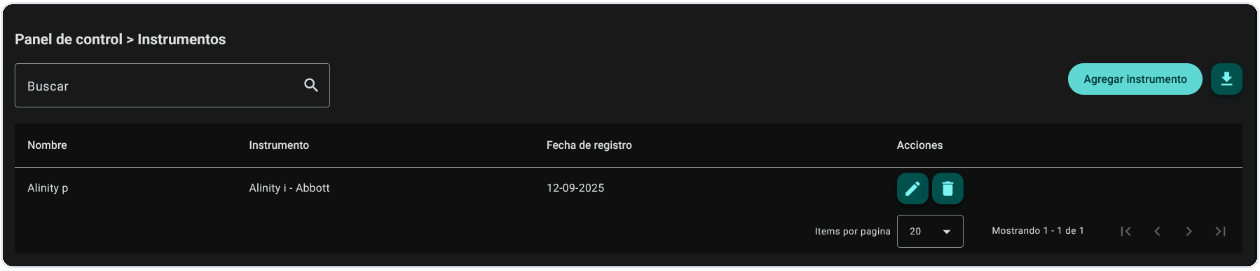
This dashboard is configured by technical directors and systems support engineers to:

- **Register new analyzers:** Add the new machines installed in the laboratory to enable the reporting of results associated with them.
- **Manage data integrations:** Uniquely identify each analyzer to configure file transmission rules and automated mapping from local computer software.
- **Analytical maintenance:** Modify the alias of the equipment in the event of physical section transfers or capacity organization.

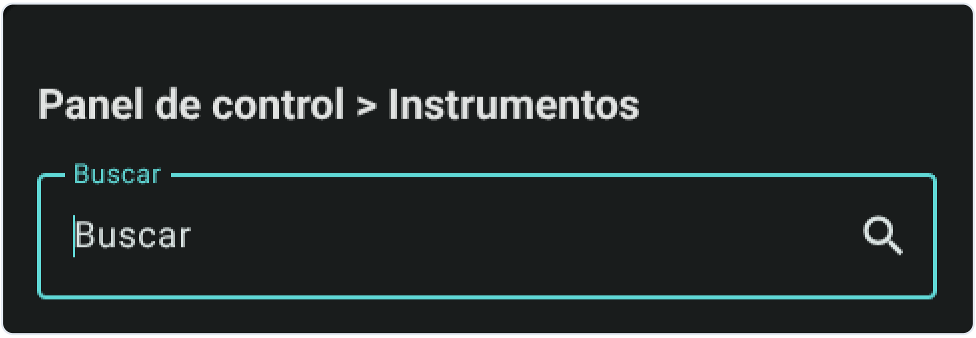
Possible Actions

1. Consult Analyzer Catalog

Shows the list of all analyzers registered in the organization, detailing: Custom name, Instrument (Model and Manufacturer) and Registration date.



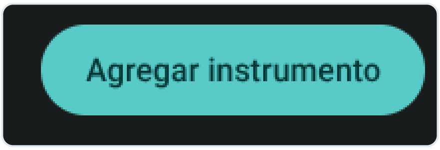
The header search engine quickly filters by equipment alias, model or machine manufacturer.



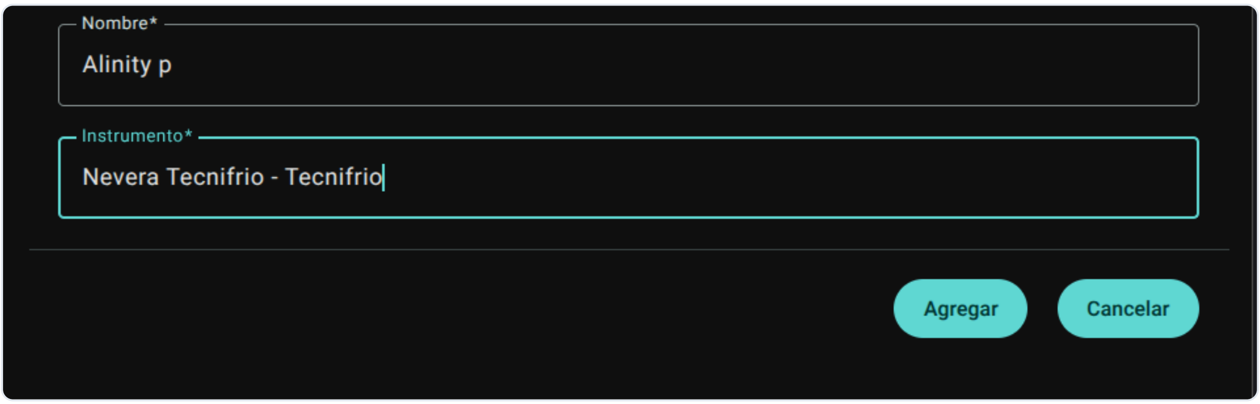
2. Add an Instrument

To register a physical analyzer:

1. Click **"Add Instrument"** in the panel header.



2. Complete the information requested in the side form:
    - **Name:** Assign a unique and descriptive alias to physically identify the equipment in the processing room (e.g. *Sysmex H1 Hematology*).
    - **Instrument:** Select the exact equipment model from the auto-complete drop-down list. The list shows the model and manufacturer (e.g. *XN-1000 - Sysmex*).



3. Press **"Add"** to register the analyzer.

3. Edit an Instrument

If you need to update the device alias or re-link the base model due to a firmware version change:

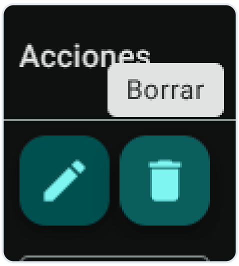
1. Click **"Edit"** (pencil icon ✏️) in the corresponding row.

2. Correct the information on the side form and click **"Update"** to apply the changes immediately.

4. Delete an Instrument

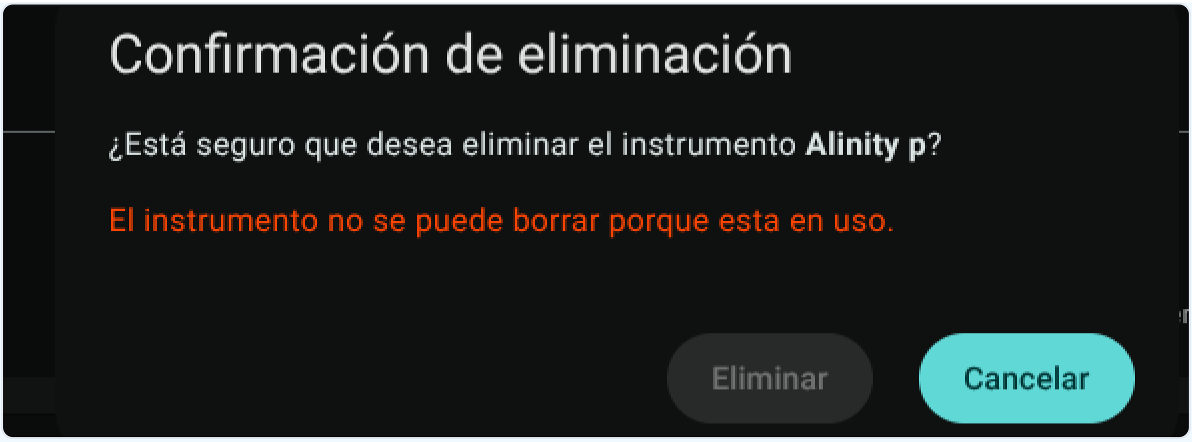
To remove a computer from the organization database:

1. Click on the trash icon (🗑️) of the desired instrument.



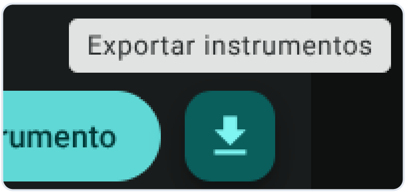
2. Confirm the deletion in the popup modal.

> **WARNING:** The system will automatically restrict and block the deletion of any analyzer that already has **QC Tests** (Quality Control Tests) created or history of QC results linked. This prevents the loss of traceability of the organization's analytical data.



5. Export Instrument Catalog

Click the download button in the header to download the complete inventory of instruments and analyzers in a **.CSV** format file.



Required Technical Permits

The administration and parameterization of analyzer equipment is regulated by the following permissions:

- `instruments_read` : Grants access to the overview and reading of the organization's instrument list.
- `instruments_create` : Authorizes the linking and registration of new physical equipment.
- `instruments_update` : Enables editing of the device's custom name and model.
- `instruments_delete` : Allows you to permanently unlink an instrument without associated quality reports.
- `instruments_export` : Allows you to export consolidated lists in `.CSV` format.

Release Notes and Changelogs

Description, Purpose and Objective

> **NOTE:** The **Release Notes** (or Changelogs) view is the official communication channel within the platform that details updates, improvements, bug fixes and new functionalities implemented in the system.
>
> A **Changelog** (or Change Log) is a structured document that chronologically compiles the modifications made to a specific version of the software. It is classified by **Category** (which corresponds to the platform product affected by the update, for example, PEEC or Quattrol 365) and indicates the **Version** number of the system.
>
> The objective of this view is to keep users and administrators informed about the technical evolution of the platform, guaranteeing visibility of the optimizations and new tools made available to your organization.

Context of Use

This module is used by:

- **Super Administrators:** To record and publish detailed release notes when updates are released to production.
- **General Users:** To consult the history of improvements implemented in your product and understand how the new features of the platform work.

Possible Actions

1. View and Search Release Notes

Allows all users to view the general table of updates published in the system, which details:

- **Name:** Administrative identifier of the change (e.g. `Update Auth Flow`).
- **Title:** Public header visible to the user (e.g. `Mejoras en el inicio de sesión`).
- **Category:** Specific product affected by the update.
- **Description:** Narrative detail of the included optimizations or corrections.
- **Version:** Build version number code.
- **Registration Date:** Day the release note was published.

The top search bar lets you enter keywords (such as a product, version number, or concept) to instantly filter table rows.

> *[Imagen ilustrativa: Listado de Notas de Versión]*

2. Add a New Release Note

To publish a system update:

1. Click the **"Add changelog"** button at the top right of the table.
2. Complete the information requested in the side form:
   - **Name:** Technical name of the change.
   - **Title:** Explanatory title that users will see.
   - **Category:** Select the product from the autocomplete list.
   - **Version:** Enter the version number.
   - **Description:** Write exhaustively the list of changes made.
3. Click **"Add"** to publish the note.

> *[Imagen ilustrativa: Formulario Agregar Notas de Versión]*

3. Edit a Release Note

If you need to correct the wording or update the data of an existing release note:

1. Click **"Edit"** (pencil icon ✏️) in the corresponding row.
2. The side form will open with the data pre-filled. Make the necessary changes.
3. Click **"Update"** to apply the changes immediately to the users' display.

> *[Imagen ilustrativa: Formulario Editar Notas de Versión]*

4. Delete a Release Note

To delete a post from history:

1. Click **"Delete"** (trash icon 🗑️) in the action column of the release note.
2. Confirm the action in the security popup modal.

> **WARNING:** Deleting a release note is permanent and irreversible in the system database.

> *[Imagen ilustrativa: Modal Confirmación de Eliminación de Nota de Versión]*

5. Export Release Notes

Allows you to download the complete history of released release notes in **.CSV** format by clicking the download icon at the top right of the table.

> *[Imagen ilustrativa: Exportación de Notas de Versión]*

Required Technical Permits

Access to this module is controlled by the following permissions in the user's role profile:

- `changelog_read` : Allows access to view and read the release notes table.
- `changelog_create` : Enables the action of adding new release notes.
- `changelog_update` : Allows you to edit and update the content of already published notes.
- `changelog_delete` : Authorizes deletion of records from the release notes database.
- `changelog_export` : Enables downloading changelog data in `.CSV` format.

Customer Management

Description, Purpose and Objective

> **NOTE:** The **Customer Management** view is the ERP module intended to register and manage the accounts of corporate clients or natural persons who contract the organization's services.
>
> A **Customer** is the commercial counterpart of the organization. The platform allows you to store an exhaustive file for each client classified into basic data (contact, identification), tax data (type of person, tax liability, company responsible for the group), payment information (terms and currency), and billing and postal shipping details.
>
> The objective of this view is to centralize the management of the organization's commercial accounts, facilitating billing, physical dispatches and traceability of projects linked to each client.

Context of Use

This module is used by the commercial, accounting and administrative team to:

- **Register new clients:** Register the complete commercial file before the start of any project.
- **Define payment and billing terms:** Establish the collection currency, payment terms (e.g. 30 days net) and tax information (fiscal responsibility).
- **Manage postal addresses:** Register separately the physical billing address and the physical shipping address for deliverables or hardware.
- **Integration and audit:** Keep clients' social networks (X, Facebook) and corporate websites updated.

Possible Actions

1. Consult and Search for Clients

Allows you to view the list of registered customers in a detailed table that includes contact name, company, suffix, NIT/document, website and currency. The top search bar allows real-time searches.

> *[Imagen ilustrativa: Listado General de Clientes]*

2. Add a New Client

To add a client to the system:

1. Click the **"Add Client"** button at the top right of the panel.
2. Complete the form structured in the following mandatory sections:
    - **Basic Information:**
        - **Contact name:** Name of the main commercial link.
        - **Name of the company:** Company name of the company.
        - **First and Last Name:** Personal information of the representative.
        - **Email, Telephone and Cell Phone:** Customer contact channels.
        - **Suffix:** Unique identifying acronym for automatic code generation.
        - **Type and Number of Identity Document:** Identification parameters (e.g. NIT, ID).
        - **City:** Location of the company.
        - **Type of person:** Legal classification (e.g. *Legal Person* or *Natural Person*).
        - **Fiscal responsibility:** Tax classification before the tax regulatory entity.
        - **Responsible company:** Organization of the business group that is legally responsible.
        - **Website, Contact Type and Contact Greeting:** Supplementary business information.

- **Status:** Initial commercial status (e.g. *Active*). * **Social Networks:** Official accounts of X (Twitter) and Facebook. * **Source:** System user who referred or managed the customer acquisition.
    - **Payment Information:**
        - **Payment terms:** Term granted for payment of invoices (e.g. *Cash*, *15 days*, *30 days*).
        - **Payment terms label:** Informative gloss on invoice.
        - **Currency:** Currency agreed upon for commercial transactions.
        - **Price Accuracy:** Number of decimal places allowed in billing amounts.
    - **Billing Information:**
        - Billing address, city, department, zip code, country and customer service name (contact responsible for receiving collection correspondence).
    - **Shipping Information:**
        - Delivery address, city, department, zip code, country and contact person for receiving physical deliverables.
    - **Complementary Information:**
        - **Notes:** Special comments or instructions from the client.

3. Click **"Add"** to save.

> *[Imagen ilustrativa: Formulario Agregar Cliente - Básico]*

> *[Imagen ilustrativa: Formulario Agregar Cliente - Facturación y Envío]*

3. Edit a Client

To modify a customer's tax data, payment terms or addresses:

1. Click the **"Edit"** button (pencil icon ✏️) in the customer row.
2. Modify the required data in the pre-filled side panel.
3. Click **"Update"** to save the changes.

> *[Imagen ilustrativa: Formulario Editar Cliente]*

4. Delete a Client

To unsubscribe a customer from the catalog:

1. Click the trash icon (🗑️) of the corresponding client.
2. Confirm the action in the popup modal.

> **CAUTION:** The system will deny deletion if the client has active projects associated on the platform, thus protecting the integrity of the historical database of projects and invoices.

> *[Imagen ilustrativa: Modal Confirmación de Eliminación de Cliente]*

5. Export Clients

Click on the download button at the top right of the table to download the total list of the organization's clients in **.CSV** format.

> *[Imagen ilustrativa: Exportación de Clientes]*

Required Technical Permits

Managing the customer database requires the following authorization keys:

- `customers_read` : Allows access to the view, table display and searches.
- `customers_create` : Enable the form for creating and inserting new clients.
- `customers_update` : Allows the modification and updating of customer file data.
- `customers_delete` : Enables the permanent deletion of clients that do not have active projects.
- `customers_export` : Enables downloading of the `.CSV` file from clients.

Constant Management

Description, Purpose and Objective

> **NOTE:** The **Constant Management** (or Enums) view is the platform's technical module designed to manage the lists of predefined values that feed the drop-down menus and static parameters of the entire system (such as currency types, billing frequencies, identification types or statuses).
>
> A **Constant** (or Enumerator) is a predefined and static data value within the system. It consists of a **Value** (the main data, such as `USD`) and, optionally, a **Complement** (complementary information associated with the value, such as the symbol `$$` or a translation).
>
> The goal of this view is to allow super administrators to add and update these master lists in real time without requiring changes at the code or database level.

Context of Use

This module is used by Product Managers and Super Managers to:

- **Update currencies and currencies:** Enable new types of currencies in the system for membership payments (e.g. enter the currency `EUR` with its symbol `€` in the `currencies` list).
- **Add payment frequencies:** Add operating frequencies for contracts or payroll (e.g. add `Semi-annual` to the `frequencies` list).
- **Parameterize dynamic lists:** Configure types of identification documents or geographic states enabled for user registration.

Possible Actions

1. View and List Constants by Category

Allows administrators to list all registered enumerators under a specific list:

1. Select the required constant category from the **Menu/Constant List** drop-down menu (for example, `currencies` or `frequencies`).
2. The system will immediately list all registered values on the screen, showing their code, name and associated plugins.

> *[Imagen ilustrativa: Listado de Constantes por Categoría]*

2. Add a New Constant

To add a new value to one of the master lists:

1. Select the destination list from the **Menu/Constant List** drop-down field.
2. Fill out the required fields:
   - **New Element (Value):** Enter the primary key or value of the constant (e.g. `USD` or `Weekly`).
   - **Complement or subitem (Optional):** Enter the additional information required depending on the type of list (e.g. the symbol `$$` for the currency or a translation code).
3. Click the **"Add"** button to save the new item to the list. It will be reflected immediately in all the forms in the system that consume that enumerator.

> *[Imagen ilustrativa: Formulario Agregar Constante]*

3. Delete a Constant

To remove an item from the list:

1. Locate the item and click the delete action (trash icon 🗑️ or remove button).
2. Confirm the action in the pop-up window.

> **CAUTION:** Do not delete constants that are being used in historical records (such as membership transactions, user profiles or active processes), as this would cause system loading failures when trying to recover the deleted value.

> *[Imagen ilustrativa: Modal Confirmar Eliminación de Constante]*

Required Technical Permits

Access to this panel requires that the user's role has the following privileges:

- `enums_read`: Grants access to view, list selection, and reading constants.
- `enums_update` or `enums_create`: Allows the addition of new elements and plugins to constant lists.
- `enums_delete`: Allows you to delete elements from the system constant lists.

Communication and Contact Channels (CMS)

Description, Purpose and Objective

> **NOTE:** The **Contact Information** view in the CMS is the module where the customer service channels, institutional telephone numbers, WhatsApp links, physical addresses and support emails displayed on the public front page are managed.
>
> A **Contact Channel** defines the name of the channel, descriptive title, representative icon (Material Icons), type of contact (e.g. Telephone, Email, WhatsApp, Location), descriptive text or value of the contact data, direct web link (URL) and sorting priority.
>
> The objective of this module is to offer visitors to the public portal immediate and updated means of communication with the company's support, sales and administration staff.

Context of Use

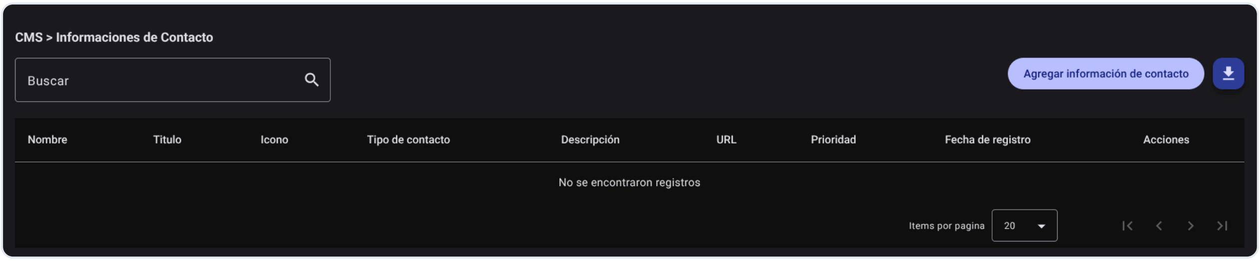
This module is used by:

- **Operations and Customer Service Administrators:** To update phone lines, support chat links or institutional emails.
- **System Administrators:** To enable or suspend service channels according to operational availability.

Possible Actions

1. Consult the List of Contact Channels

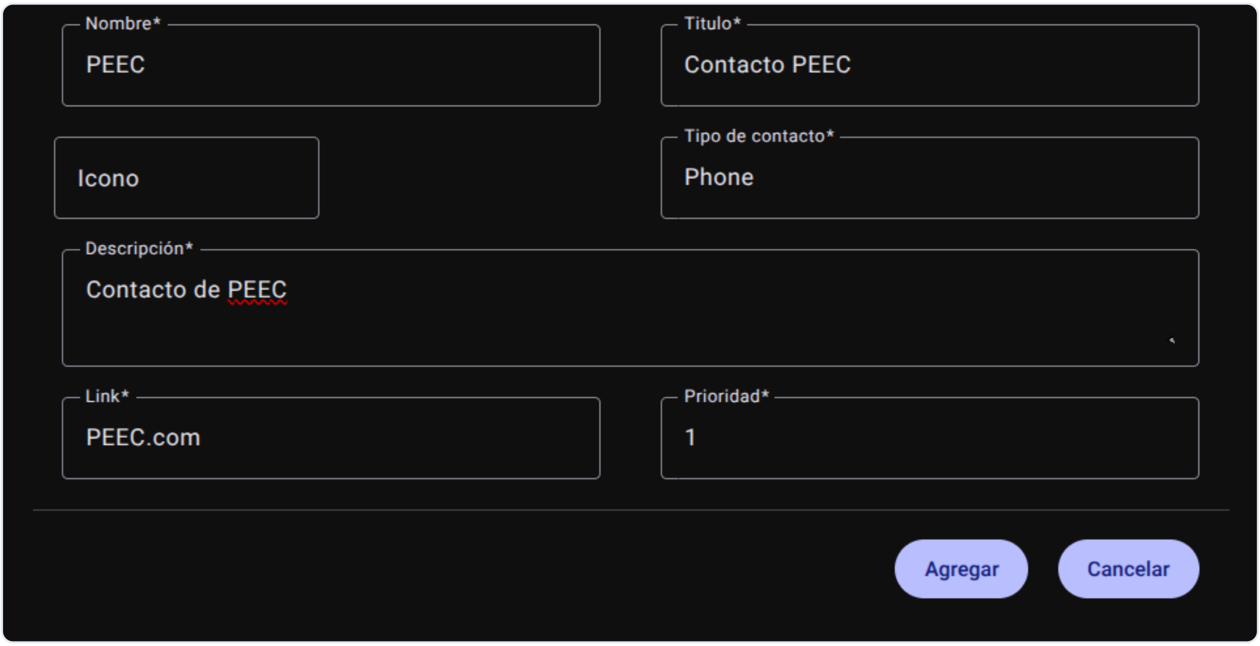
1. In the main administration table, display the contact channels with the columns: Name, Title, Icon, Contact Type, Description, URL, Priority, Registration Date and Actions.
2. Use the **"Search"** field to filter channels by type (e.g. WhatsApp, Email), name or description.
3. Sort the rows according to the level of attention priority.



2. Register a New Contact Channel

1. Click the **"Add Contact Information"** button.

2. Fill out the required fields on the side panel form:
   - **Name:** Channel identifier (e.g. WhatsApp Attention, Support Email, National Line).
   - **Title:** Explanatory header of the channel.
   - **Icon:** Name of the icon from the Material Icons library (e.g. `phone`, `email`, `whatsapp`).
   - **Type of contact:** Classification of the communication channel (Phone, Email, Social Network, Location).
   - **Description:** Telephone number, email address or informative text of the channel.
   - **URL:** Direct action link (e.g. `https://wa.me/...` or `mailto:...`).
   - **Priority:** Integer to determine the position of the channel in the footer or contact section.

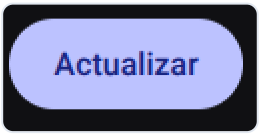


3. Save the record by clicking **"Save"**.

3. Edit a Contact Channel

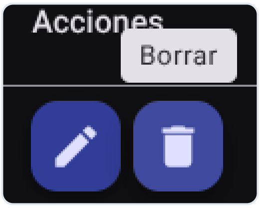
1. Locate the channel in the table and click the edit button (pencil icon✏️) in the actions column.

2. Modify the desired fields and save the changes to the **Save** button.

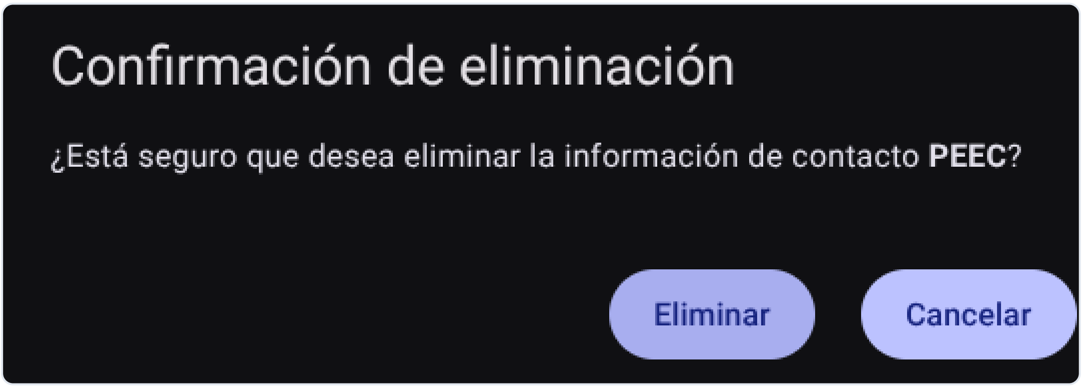


4. Delete a Contact Channel

1. To delete a channel, use the delete button (trash can icon🗑️) in the actions column.

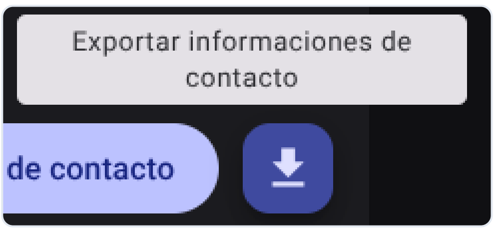


2. Confirm the action.



5. Export the Contact Channel Catalog

1. Click the **Export contact information** button (download icon). You will obtain a report in CSV/Excel format with the complete inventory of configured contact channels.



Required Technical Permits

- `contact_info_read` : Allows you to consult the configured contact channels.
- `contact_info_create` : Authorizes the addition of new service channels on the platform.
- `contact_info_update` : Enable updating phone data, emails, icons and priorities.
- `contact_info_delete` : Allows you to unpublish or delete contact channels.
- `contact_info_export` : Allows downloading of the complete contact information report.

Payroll Management and Approval

Description, Purpose and Objective

> **NOTE:** The **Payroll Management** view (or ERP Payroll) is the module in charge of processing, auditing and monthly approval of the fees and salaries to be paid to the organization's collaborators based on their reported time.
>
> A **Payroll Request** (or Period Report) is a digital document that consolidates the total of **Regular Hours** and **Overtime** worked by an employee during a specific month on their assigned projects. The request moves through a hierarchical flow of statuses: *Pending PM* (pending approval by the project leader), *Pending Accounting* (approved by the leader and pending accounting review), *Approved* (approved and ready for payment), and *Rejected* (rejected with comments for correction).
>
> The objective of this module is to automate the settlement of monthly salaries by crossing contractual information with time tracking, guaranteeing transparency in collections and streamlining the flow of accounting approvals.

Context of Use

This module is used in a coordinated manner by:

- **Collaborators:** To generate and send your consolidated hours report at the end of the month.
- **Project Managers (PMs):** To review and approve the hours reported in their projects in charge (*PM Approval*).
- **Accounting and Finance:** To carry out the final tax review and authorize payment disbursements (*Accounting Approval*).

Possible Actions

1. Consult Payroll History

Shows a table with the history of the user's payroll requests, detailing the year, month, payment currency, registration date and the **General Status** of the request (Pending, Approved, Rejected).

> *[Imagen ilustrativa: Histórico de Solicitudes de Nómina]*

2. Create and Submit Monthly Payroll Request

To file the collection report for the past month:

1. Click **"Add Payroll Request"** at the top of the panel.
2. In the side form, select the **Month to record** using the date selector (which restricts the view to Year-Month selection).
3. Click the **"Generate Time Tracking Report"** button. The system will automatically collect the hours registered by the user in said month and group them into cards for each project, detailing:
   - **Regular hours:** Ordinary hours validated according to contract.
   - **Overtime:** Additional hours reported.
   - **Total hours:** Sum of time worked.
   - **Expected hours:** Minimum contractual parameter required for the period.
4. For each consolidated project, enter a **Comment** that justifies the work performed in the month.
5. Click **"Add"** to submit the request to the approval flow.

> *[Imagen ilustrativa: Formulario Agregar Solicitud de Nómina]*

3. Manage Pending Approvals (For PM/Accounting Roles)

Users with approval permissions will see the **"Pending Approvals"** tab:

Pending PM Approvals

Project leaders view the consolidated timesheets of the collaborators assigned to their projects. They can open the detail, compare with the development goals and click **"Approve"** or **"Reject"** (entering a reason for rejection if not).

Pending Accounting Approvals

Once the PM approves the request, it is moved to the accounting queue. The financial team validates the costs calculated according to the currency and hourly rates of the current contracts. They approve the request by ending the process, or reject it by returning it to the beginning of the flow.

> *[Imagen ilustrativa: Bandeja de Aprobaciones de Nómina]*

4. Correct and Resend Rejected Payroll

If a payroll request is returned with status *Rejected*:

1. Locate the record in the general table (the edit button will be enabled only for rejected records).
2. Click **"Edit"** (pencil icon ✏️).

3. Modify the comments, adjust the hours in your tracking module if necessary, and click **"Update"** to reprocess and submit the request for review.

> *[Imagen ilustrativa: Corregir Nómina Rechazada]*

5. Export Payroll Reports

Allows you to download consolidated salary information in **.CSV** format by clicking on the download icon. Useful for integrations with external banking or accounting software.

Required Technical Permits

Access to salary flows is controlled by the following privileges:

- `payroll_read` : Allows access to the personal payroll tab and historical consultation.
- `payroll_create` : Enables the action of generating monthly time tracking reports and filing requests.
- `payroll_update` : Allows the correction of requests that have a *Rejected* status.
- `payroll_export` : Allows you to download the consolidated documents in `.CSV` format.
- `payroll_approve_pm` : Authorizes approval or rejection at the first level of project leadership.
- `payroll_approve_accounting` : Authorizes second level financial approval and closing of payroll for payment.

Default Options Settings

Description, Purpose and Objective

> **NOTE:** The **Default Options** view is the system analytic configuration section that allows coordinators and administrators to define default responses or preferred methods for different proficiency evaluation events (PEEC/POQTROL).
>
> A **Default Option** (or Default Response) is a pre-loaded value in dynamic forms that is automatically presented to the user when they are going to enter their results. This data may include methods of analysis, preferred units of measurement, or common reagents.
>
> The objective of this view is to optimize the data entry flow for participating organizations, reducing typographical errors and reducing the time required to complete reports.

Context of Use

This module is used by support staff or event coordinators to:

- **Preload common methods:** Establish the most used analytical methods for analytes in Clinical Chemistry, Hematology or Urinalysis events.
- **Clone configurations:** Copy the responses and parameters defined in a previous event to the current event to avoid manual re-entry of information.
- **Set up dynamic quizzes:** Link predefined questions and answers that participants will find on their entry forms.

Possible Actions

1. View Configuration by Event Type

The system organizes the interface into interactive tabs, each tab corresponding to a type of active event on the platform (for example, *Clinical Chemistry*, *Hematology* or *Uroanalysis*). Clicking on a tab loads the questions configured for that specific event.

> *[Imagen ilustrativa: Opciones por Defecto por Evento]*

2. Configure Default Responses and Methods

To assign the default values that participants will see:

1. Select the tab of the event you want to configure.
2. For each question or analyte listed:
    - Select the recommended or default scanning method from the drop-down list.
    - Specify the instrument or unit if the form requires it.
    - Fill in numeric or text fields with the organization's standard responses.
3. Click the save button to register the default response template.

> *[Imagen ilustrativa: Configuración de Respuestas por Defecto]*

3. Copy Options from Previous Events

To speed up the parameterization of a repetitive event:

1. Click the **"Copy from previous event"** or **"Copy previous responses"** button.
2. Select the historical event for which you want to import configuration data.
3. The system will overwrite the current fields with the imported information.
4. Make specific settings and save.

> *[Imagen ilustrativa: Copiar Opciones de Evento Anterior]*

Required Technical Permits

The default response configuration is regulated by the following access keys:

- `default_options_read`: Allows you to enter the view and display the configured events.
- `default_options_update` or `default_options_create`: Enables field editing, default method assignment, and copying previous event configurations.

Audit Log

Description, Purpose and Objective

> **NOTE:** The **Audit Log** (or Logs) view is the security and traceability tool of the system in charge of chronologically recording all operations and history of modifications made to the platform.
>
> An **Audit Log** (or Traceability Record) is a computer file or record generated automatically by the system every time a user performs a creation, update or deletion action in the organization's database.
>
> The goal of this view is to ensure information transparency and security, allowing auditors and administrators to track exactly what changes were made, when, and by whom.

Context of Use

This module is mainly used by auditors, information security officers and general administrators to:

- **Investigate bugs or inconsistencies:** Track suspicious or erroneous modifications to quality control settings or court files.
- **Comply with quality regulations:** Maintain complete traceability required by regulatory entities in health or legal management.
- **Compare data states:** Compare the previous state (**Before**) and the after state (**After**) of a modified record.

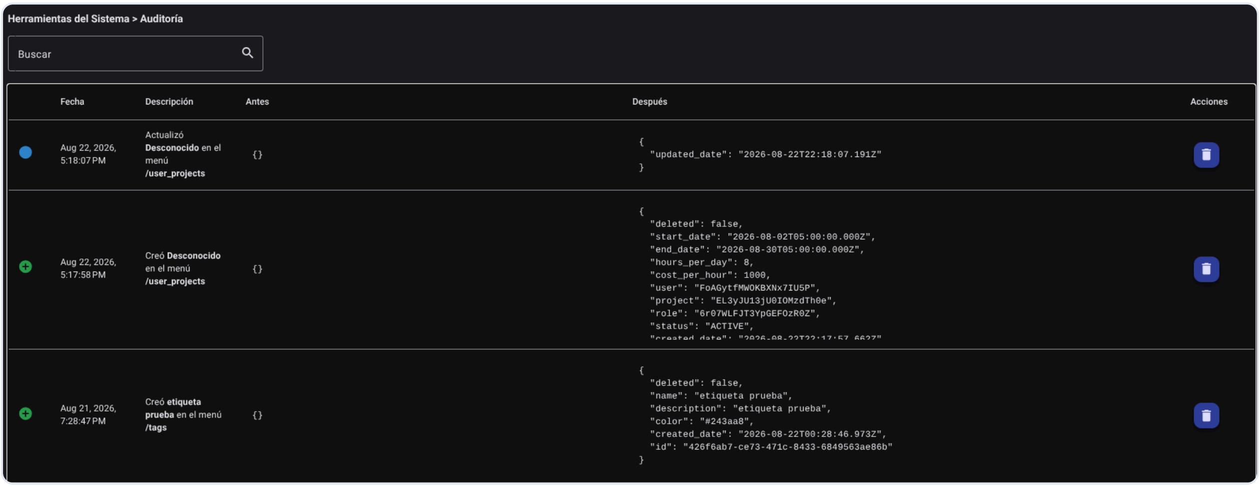
Possible Actions

1. Consult and Filter Audit Traces

Allows access to the complete history of events registered for the organization. The interactive table exposes the following details for each trace:

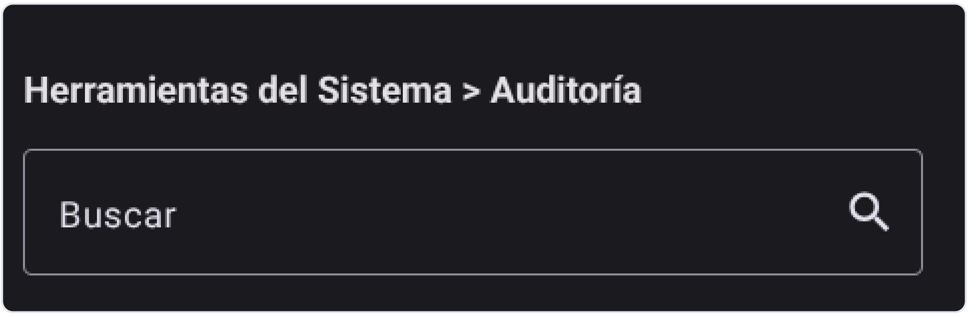
- **Visual Indicator:** A colored icon that summarizes the category of the operation:
  - **Green:** Creation of a new element.
  - **Blue:** Modification of an existing record.
  - **Red:** Deletion of system information.
- **Date:** Exact timestamp (day, month, year and hour) when the action was executed.
- **Description:** Detail that specifies the action performed, the name of the affected element and the menu or database collection where the event occurred.

- **Before:** Data structure in **JSON** (JavaScript Object Notation, a lightweight structured data exchange format) format that shows the values that the record had before the change.
- **After:** Data structure in **JSON** format that details the new values after the update is applied.



2. Search Specific Events

In the top bar, enter any term (such as the name of a menu, the name of a user, or a particular action). The table will update in real time showing only the records that match the search.

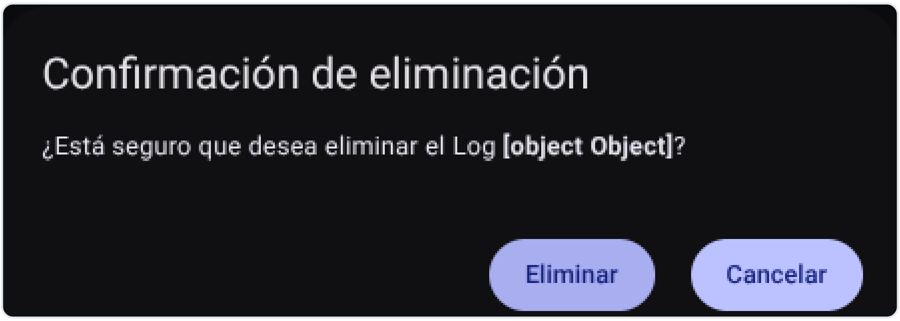


3. Delete a Log Record (If applicable)

If the administrator user has advanced log debugging permissions:

1. Locate the log trace you want to remove from the list and click the **"Delete"** button (trash icon 🗑️).

2. Confirm the deletion in the security pop-up modal. The record will be permanently deleted from the display table.



> **WARNING:** Deleting audit logs is a critical security action. It is recommended to restrict this permission to the minimum possible staff to keep the chain of custody of the information intact.

Required Technical Permits

Access to and management of the audit log is controlled by the following privileges:

- `logs_read`: Allows you to enter the audit menu, list the traces and search among the events.
- `logs_delete`: Enables the action of deleting specific audit history entries.

Incident Management and Technical Support

Description, Purpose and Objective

> **NOTE:** The **Incident Management** view is the centralized module for recording, reporting and tracking incidents, errors or requests for new features, with automatic synchronization to the development team's repository (GitHub).
>
> An **Incident** is parameterized through the following sections:
>
> - **1. Rating:**
> - **Visibility***: *Organizational* (visible for the entire organization) or *Personal* (visible only by whoever creates it).
> - **Issue Type***: *Bug*, *Feature* or *Task* (automatically assigns the corresponding tag in GitHub).
> - **2. Detail:**
> - **Title***: Short summary of the reason or failure (minimum 5 characters).
> - **Description***: Detailed explanation of the case (supports Markdown format).
> - **Steps to reproduce**: Optional indication of the exact sequence to replicate the bug.
> - **Attachments**: Supporting evidence or screenshots.
>
> The goal of this view is to allow users to report requests and continuously track the resolution status (*Open* or *Closed*).

Context of Use

This module is used by:

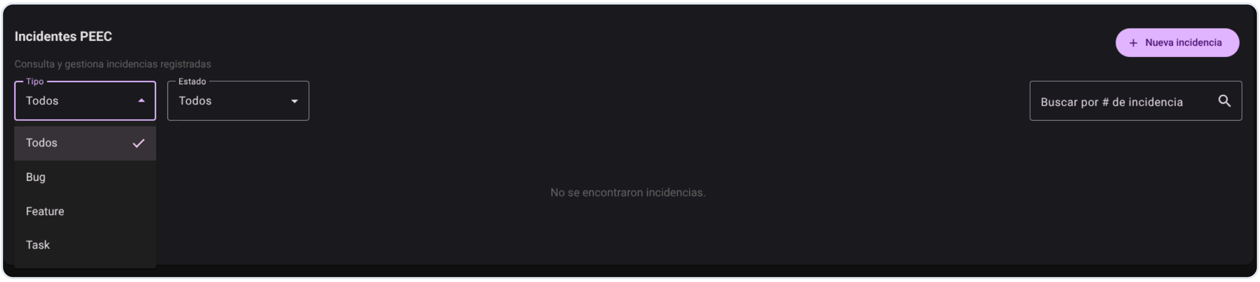
- **Users or Organization Operators:** To report technical non-conformities, screen errors or request improvements.
- **Technical Support Agents and Developers:** To audit, diagnose and track the progress of the registered ticket.

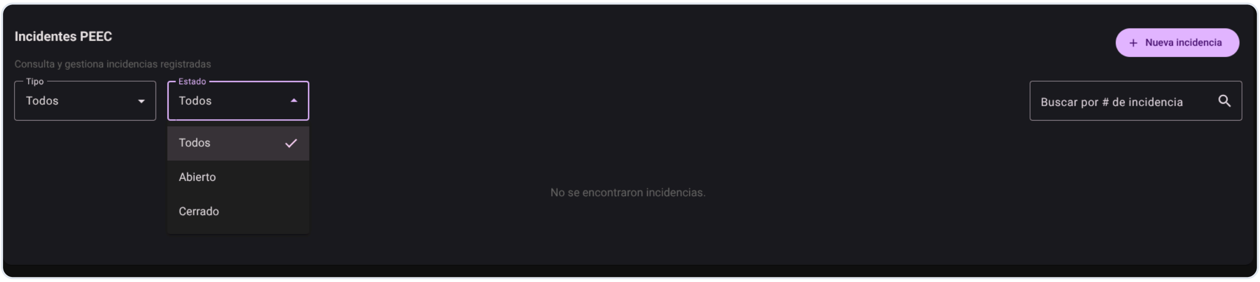
Possible Actions

1. Consult and Filter Incidents

1. Use the drop-down menus at the top to filter by **Type** (*Bug*, *Feature*, *Task*) or by **Status** (*Open*, *Closed*).

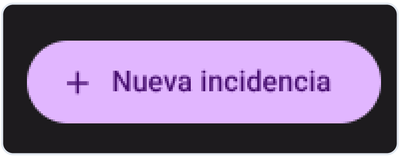
2. Enter the code in the **"Search by Issue #"** field to find a specific ticket and check the progress status of its review.



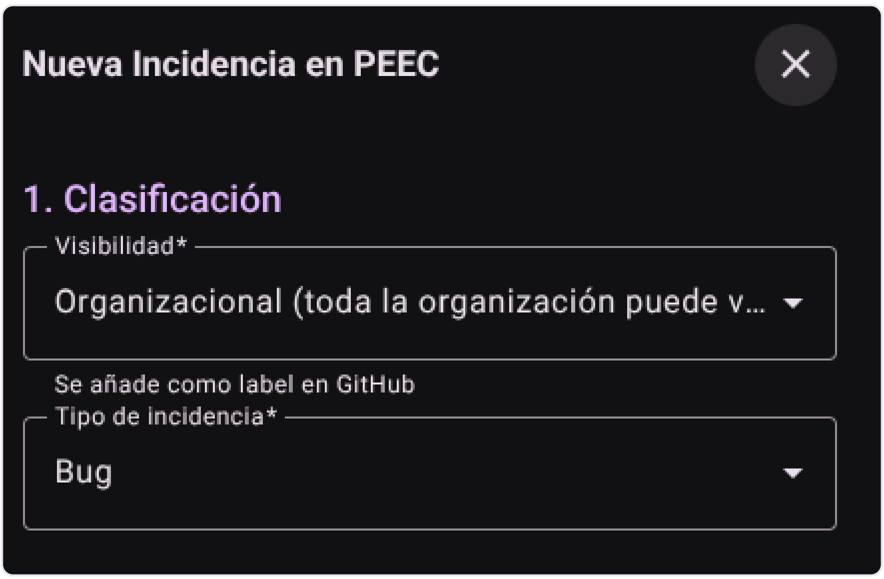


2. Register a New Incident

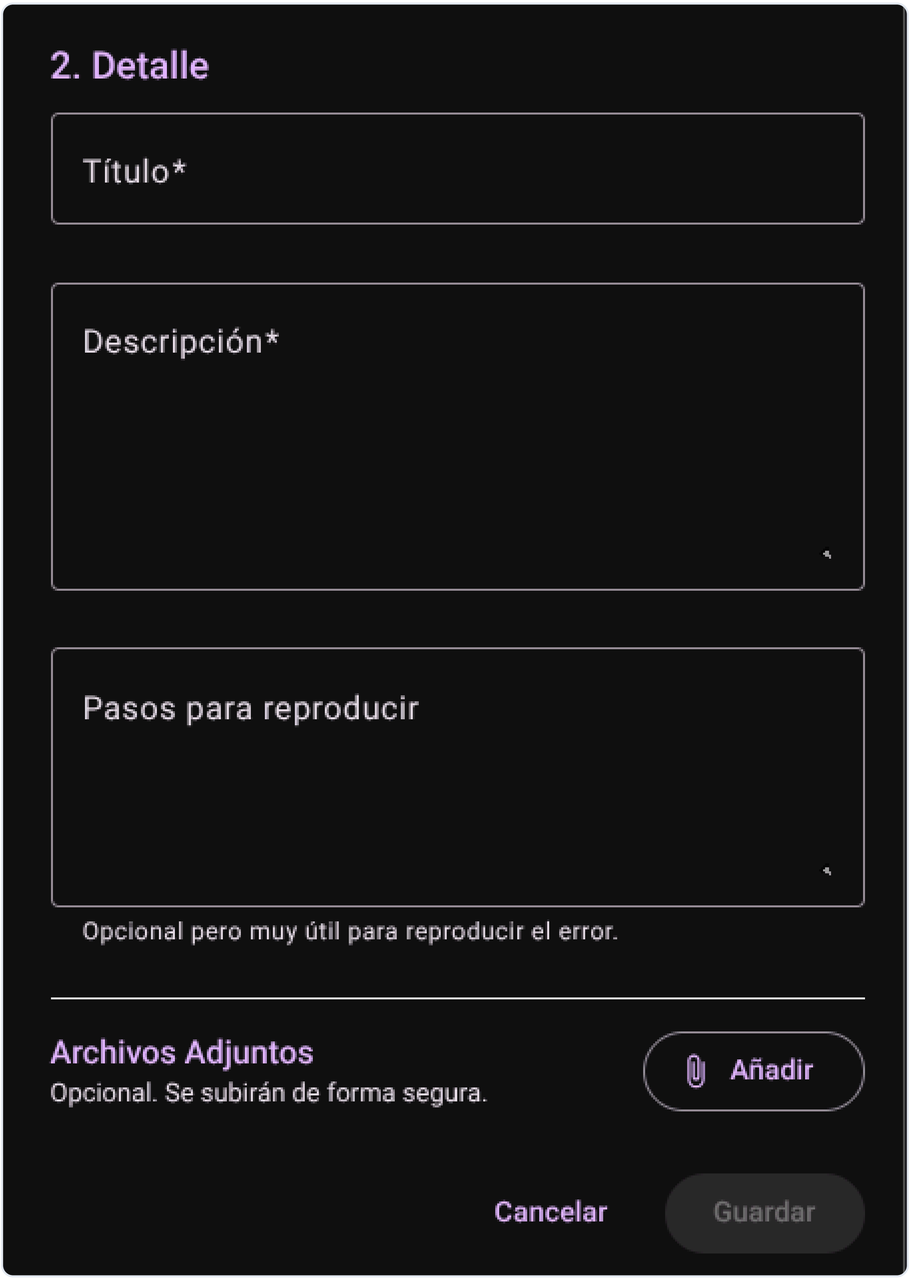
1. Click the *++New Incident"** button located in the upper right corner.



2. In the side panel that appears, define section **1. Rating**:
    - *Visibility:** Choose between *Organizational* (visible to the entire organization) or *Personal* (visible only by whoever creates it).
    - *Issue Type:** Select between *Bug*, *Feature* or *Task* (this option automatically assigns the corresponding tag in GitHub).



3. Complete section **2. Detail**:
   - *Title:** Briefly summarize the reason or failure (minimum 5 characters).
   - *Description:** Explains the case in detail (supports Markdown format).
   - **Steps to reproduce:** (Optional) Indicates the exact sequence to replicate the failure in the system.
   - **Attachments:** click the **Add** button if you need to attach screenshots or supporting evidence.



4. Press the **"Save"** button to submit the report (or **"Cancel"** to close the panel without keeping the changes). When you click Save, the ticket is recorded in the list and automatically creates the corresponding task/issue on GitHub for the development team.

Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

Template Management

Description, Purpose and Objective

> **NOTE:** The **Template Management** view is the system tool designed to centralize, design and manage the communication formats and documents automatically sent to users (such as welcome emails, news notifications and system alerts).
>
> A **Template** is a predefined design that structures the content of a communication. It supports HTML (**innerHtml**) formatting to structure and style the design, and can include dynamic variables or parameters that the platform auto-populates with organization or user data upon submission.
>
> The goal of this view is to allow administrators to maintain consistency in the design and content of all automated communications on the platform.

Context of Use

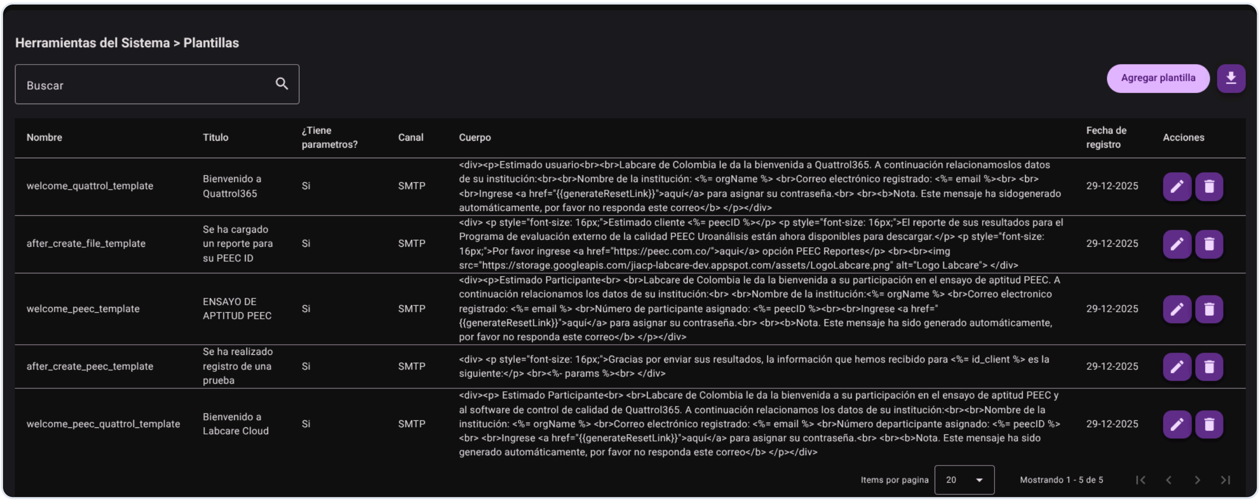
This module is used by Product Managers to:

- **Configure automatic notifications:** Design the system's official emails (for example, the confirmation email for entering quality control results or the notification email for a new judicial action).
- **Parameterize dynamic content:** Define fixed texts combined with variables that adapt in real time to each organization or user.
- **Validate visual rendering:** Use the real-time viewer to verify that the HTML code is displayed correctly before publishing or activating the template in production.

Possible Actions

1. View and List Templates

It allows administrators to consult the complete list of formats saved in the database through a table that details the name of the template, the title that users will see, the associated communication channel, the body of the template and the entry date.

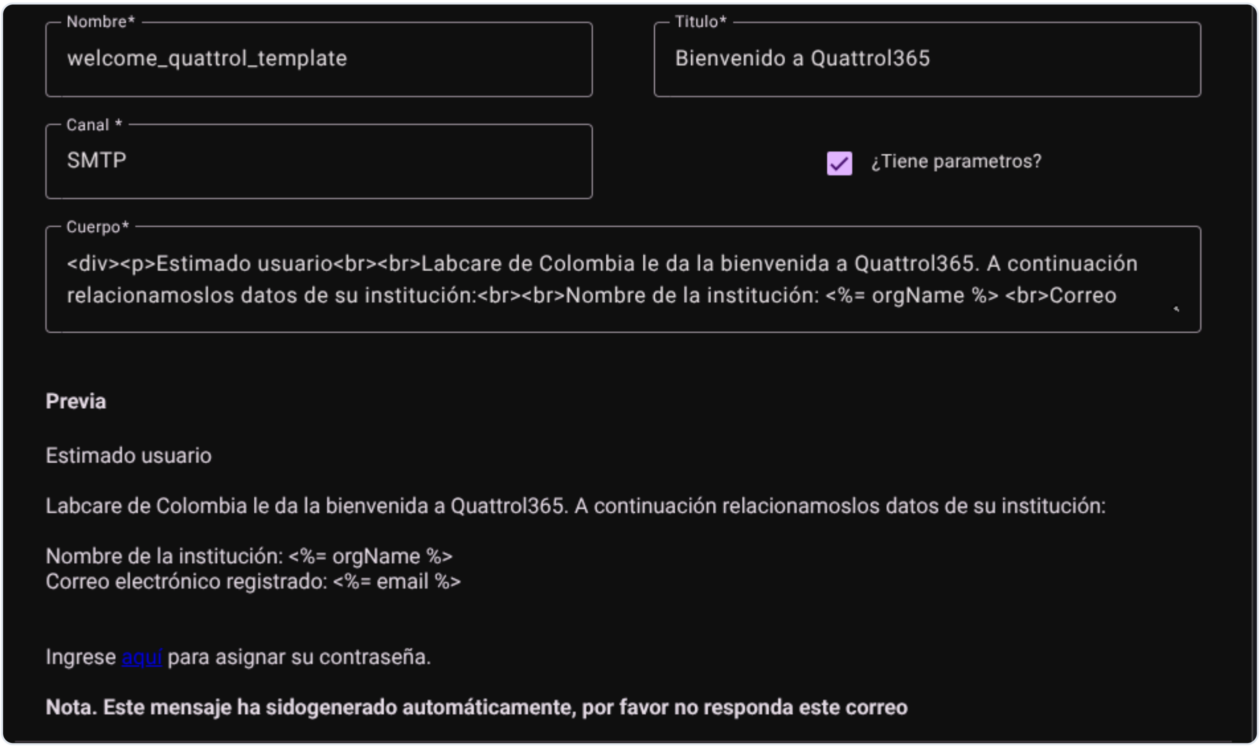


2. Add a New Template

To design and incorporate a new template into the system:

1. Click the **"Add Template"** button at the top right of the table.

2. Fill out the form with the required fields:
    - **Name:** Internal administrative name to identify the file (e.g. `email_bienvenida_usuario`).
    - **Title:** Subject of the email or header of the message that the end user will receive (e.g. `Bienvenido a la Plataforma`).
    - **Channel:** Communication medium through which the message will be sent (e.g. `Email`, `SMS`, `Notificación Interna`).
    - **Does it have parameters?:** Check this box if the template will use structured dynamic variables.
    - **Body (innerHtml):** Enter the template content written in HTML code to configure the styles, tables and images.
    - **Display Preview:** At the bottom of the HTML editor, check the real-time preview section to check the layout of the elements.

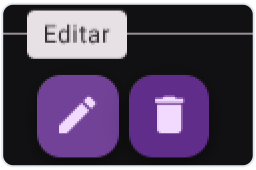


3. Click **"Add"** to register the template.

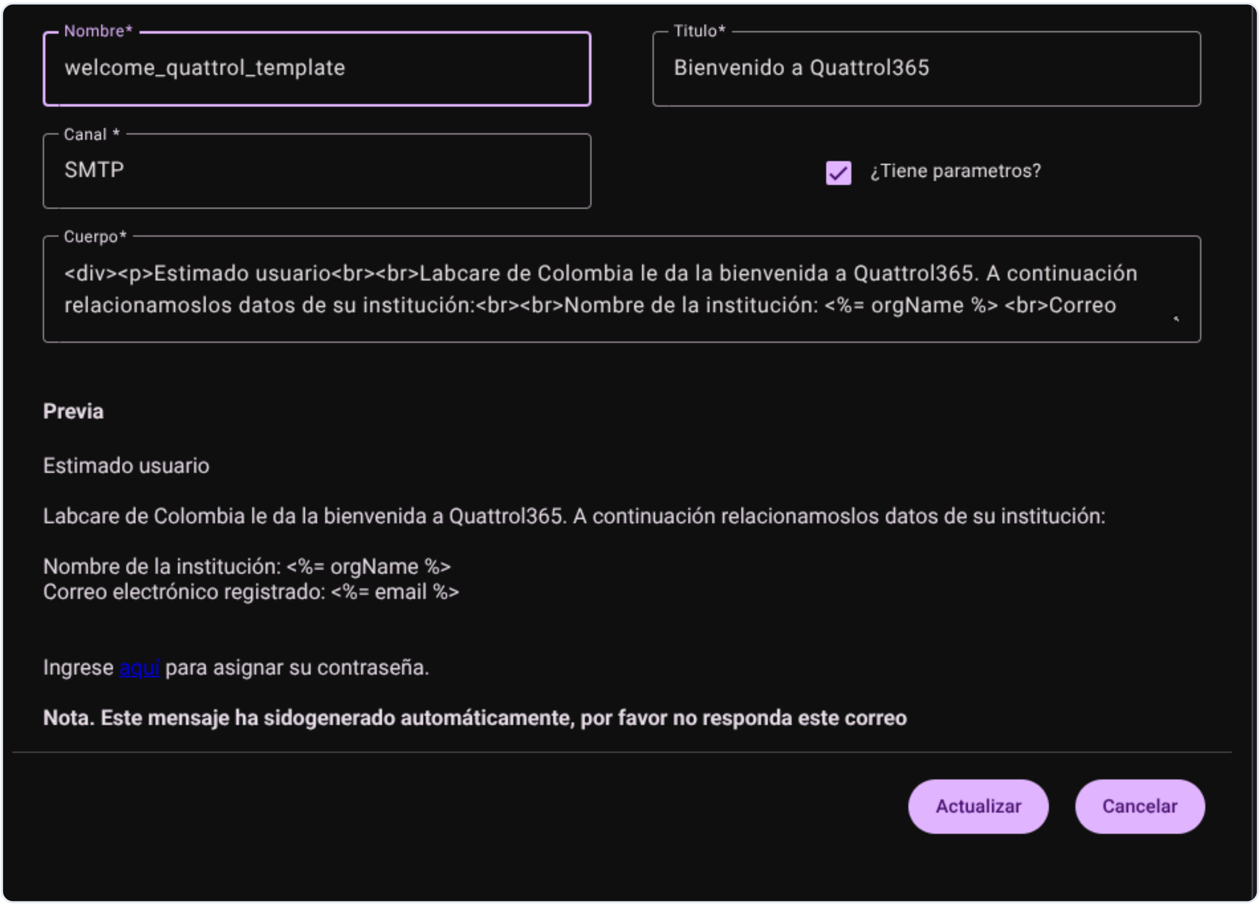
3. Edit a Template

To modify the layout or subject of a saved template:

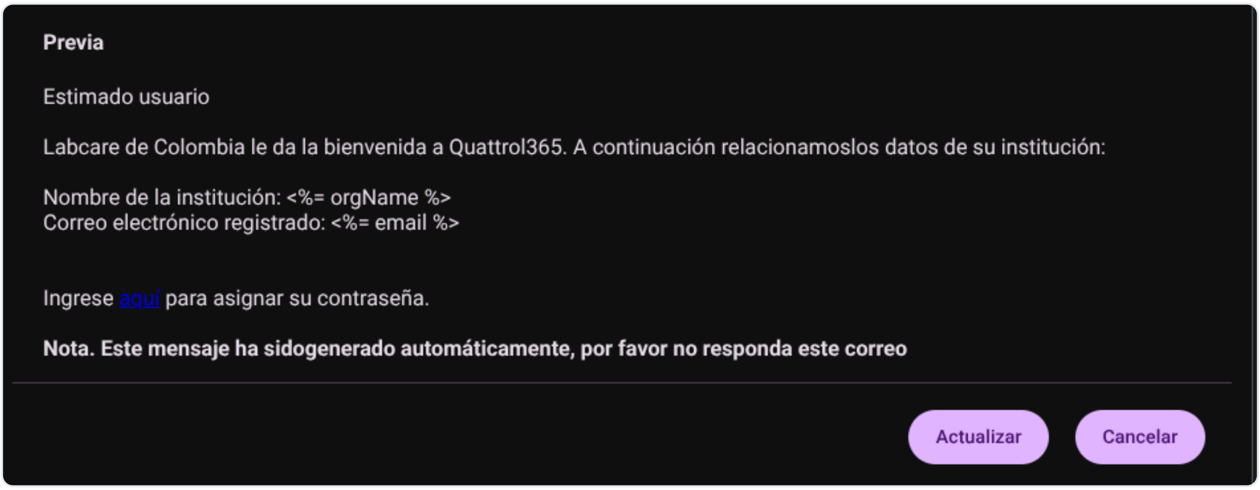
1. Find the corresponding record and click **"Edit"** (pencil icon ✏️).



2. The code and fields editor will load with the existing information. Make any desired modifications to the HTML code, parameters, or title.



3. Use the interactive preview to validate your changes.

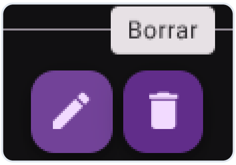


4. Click **"Update"** to apply the changes immediately to system notifications.

4. Delete a Template

To permanently delete a template:

1. Click the trash icon ( ) of the record in the table.

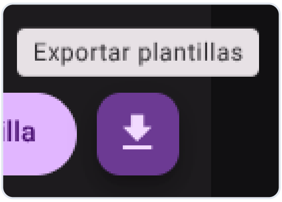


2. confirm the action in the popup modal.

> **CAUTION:** Deleting a template is irreversible. The system will restrict deletion if the template is actively assigned to automated shipping flows configured in other menus.

5. Export Templates

Allows administrators to download the list of templates in **.CSV** format to perform external audits of channels and formats enabled on the platform.



Required Technical Permits

Access to this module requires that the administrator role has the following authorizations:

- `templates_read` or `templates_list` : Allows you to list and consult the template catalog in the table.
- `templates_create` : Enable the editor and the button to register new formats.
- `templates_update` : Grants access to modify the HTML code and fields of existing templates.
- `templates_delete` : Authorizes the definitive deletion of templates from the system.
- `templates_export` : Enables export of templates in data format.

Repair Scripts Console

Description, Purpose and Objective

> **NOTE:** The **Script Console** is an advanced level maintenance and support tool within the ERP, designed for the controlled execution of routines and programmed commands that operate directly on the organization's databases in real time.
>
> A **Repair Script** (or Maintenance Script) is a previously compiled and tested code routine that performs tasks of mass data correction, index restructuring, recalculation of historical accumulations or forced activation of services that cannot be performed through standard user interfaces.
>
> The goal of this view is to provide the development support team and super administrators with a unified console to perform immediate technical repairs and deployments without the need for service outages or application updates.

Context of Use

This advanced dashboard is restricted exclusively to Senior Support Engineers and Super Administrators to:

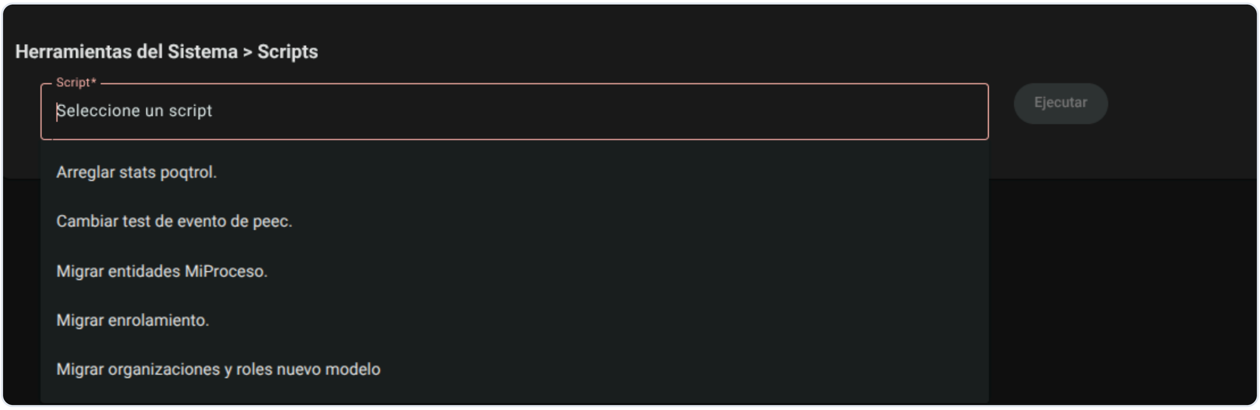
- **Fix massive inconsistencies:** Repair damaged or orphaned records generated by random network failures.
- **Recalculate reports:** Force manual recalculation of metrics on historical quality events.
- **Hot Updates:** Run database patches directly from the administration web frontend securely.

Possible Actions

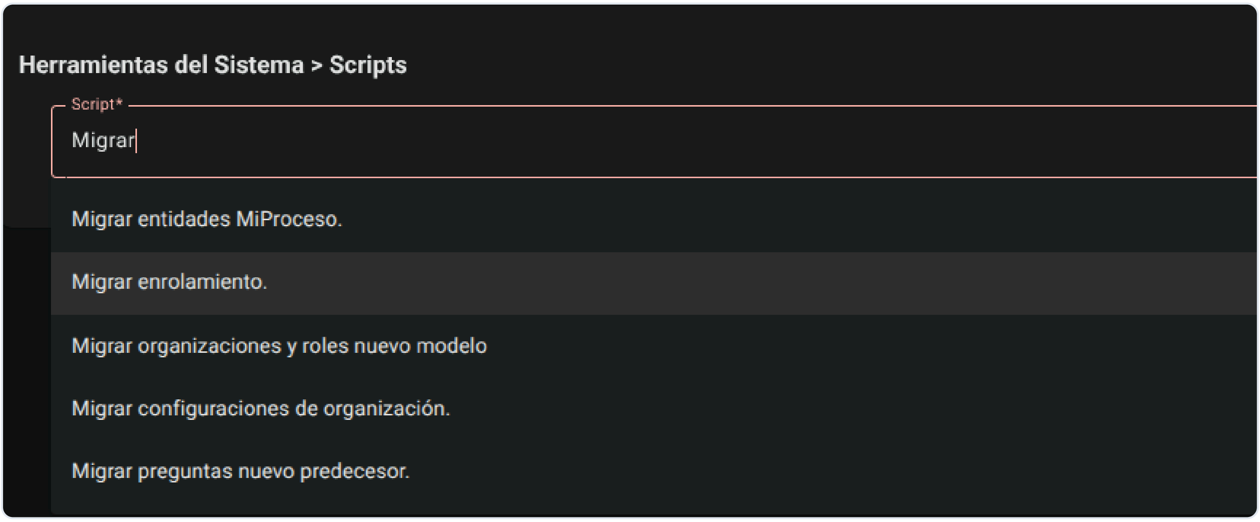
1. Select a Script from the Gallery

The system has a catalog of predefined scripts.

1. Click the **Script** field.



2. Type keywords for the script you want to run or view the autocomplete list.



3. Select the required script.

2. Run Maintenance Script

Once the script is selected:

1. Click the **"Run"** button.

2. The button will change to a loading spinner while the code routine runs on the database server.
3. Upon completion, the system will display a pop-up notification message confirming the success of the operation or detailing the modified records.

> **CAUTION:** Running database scripts hot is a high risk operation. Make sure you make a backup and have validated the script in test environments before proceeding with its execution in production.

Roles and Permissions Required

To access and interact with this advanced administration module, the user must have a **IT Support** or **Super Administrator** role and have the following specific permissions active:

- **Access and display:** `data_migration_read` (for general restructuring consoles) or `migrate_lab_new_model_read` (for updating laboratories to v2).
- **Write and run operations:** `data_migration_create` / `data_migration_update` or `migrate_lab_new_model_create` / `migrate_lab_new_model_update` that allow scripts to be launched on the production database.

Partnership and Alliance Management (CMS)

Description, Purpose and Objective

> **NOTE:** The **Associations and Alliances** view in the CMS is the module in charge of managing the catalog of agreements, strategic allies and linked brands that are displayed on the platform's public portal.
>
> An **Association** is an institutional record composed of the name of the ally, descriptive title, official logo, summary of the alliance and link to its website or information page.
>
> The objective of this module is to provide visibility to the organization's institutional and commercial alliances in a dynamic and centralized way.

Context of Use

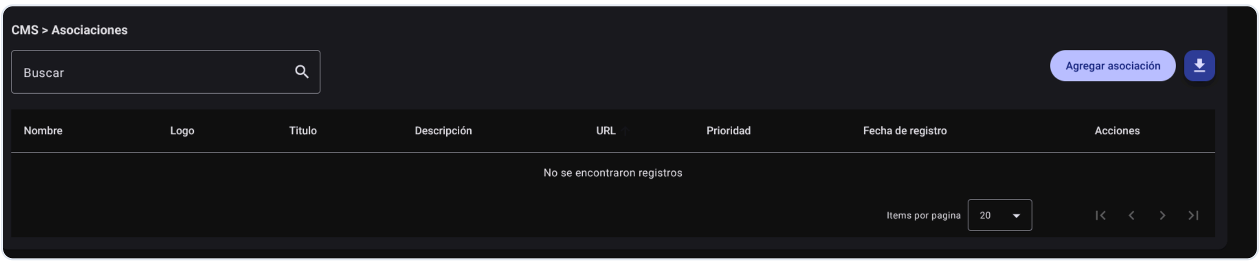
This module is used by:

- **Content and Marketing Administrators:** To publish new agreements, update institutional logos or adjust the official links of allies.
- **System Administrators:** To enable or disable associations in the institutional portal.

Possible Actions

1. Consult the Catalog of Associations

1. In the main table, display the list of registered associations.
2. Use the **"Search"** search field to filter by ally name, title, or description.
3. Sort the table columns (Name, Title, State) as necessary.



2. Register a New Association

1. Click the **"Add Association"** button.

2. Complete the data in the drop-down side form:

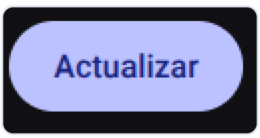
- **Name of Ally:** Commercial or institutional identifier of the entity.
- **Title:** Slogan or short title of the alliance.
- **Logo (URL / File):** Direct link or upload of the official logo.
- **Description:** Brief summary of the benefits or scope of the agreement.
- **Destination URL:** Official website link of the ally.
- **Status:** Active/Inactive.

3. Click **"Add"**.

3. Edit or Delete an Association

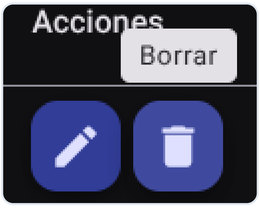
1. Locate the association in the table and click the edit button (pencil icon✏️) in the actions column.

2. Modify the desired fields and save the changes to the **Save** button.

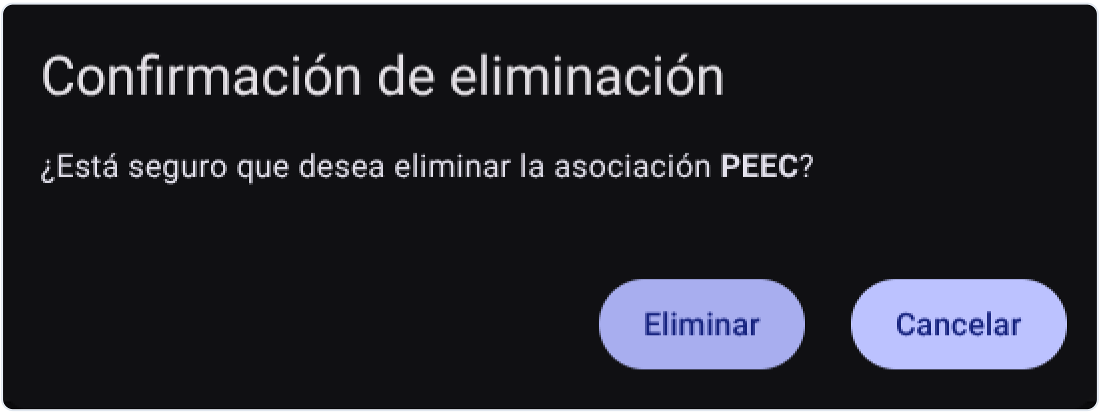


4. Delete an Association

1. To unsubscribe from an alliance, use the delete button (trash can icon 🗑️) in the actions column.

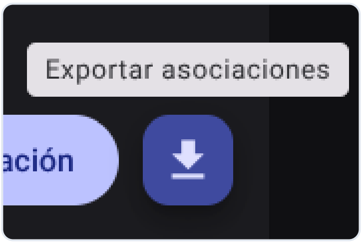


2. confirm the action.



5. Export the Association Catalog

1. Click on the button with the download icon (**Export associations**), a file in Excel/CSV format will be generated and downloaded with the complete list of registered agreements.



Required Technical Permits

- `partnership_read` : Allows you to view the list of associations and alliances.
- `partnership_create` : Authorizes the registration of new alliances in the CMS.
- `partnership_update` : Enables updating logos, links and descriptions.
- `partnership_delete` : Allows you to remove or inactivate agreements from the catalog.
- `partnership_export` : Allows you to download the massive association report.

Consumer Management (CMS)

Description, Purpose and Objective

> **NOTE:** The **Consumers** view in the CMS is the module in charge of managing the list of notable clients, success stories and institutional testimonials that are displayed on the public portal (*landing page*) of the platform.
>
> A **Consumer** is a record that represents an entity or corporate user that is a client of the platform, and includes its name, official logo, representative title, description of the impact or testimonial, web link and order of display priority.
>
> The objective of this module is to manage the elements of social proof and institutional credibility shown to visitors to the web portal.

Context of Use

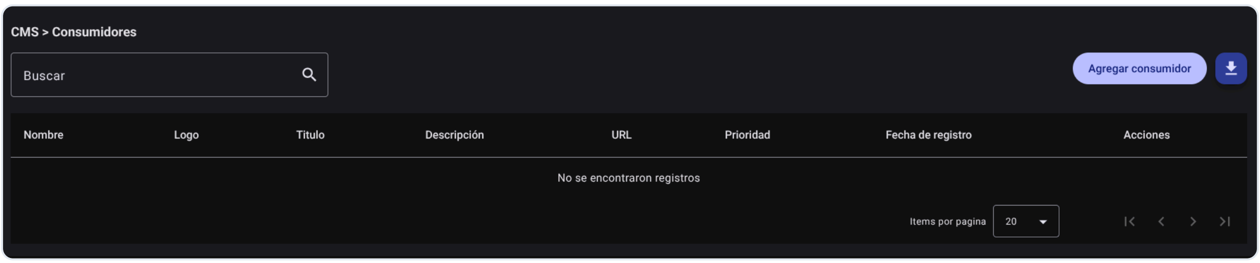
This module is used by:

- **Content and Marketing Administrators:** To publish new logos of corporate clients, update usage testimonials and define the order of visual relevance of success stories.
- **System Administrators:** To keep the list of platform clients updated.

Possible Actions

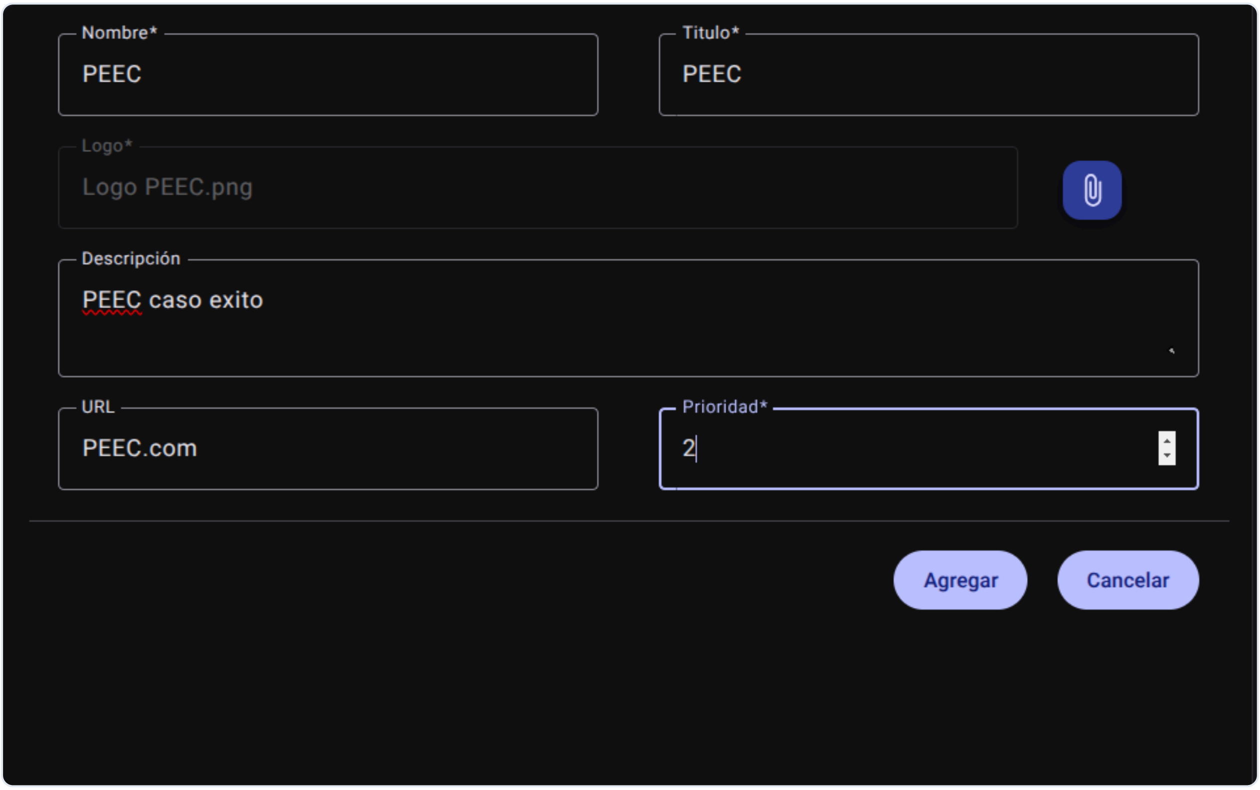
1. Consult the List of Consumers and Clients

1. In the main table, see the registered customers with the columns: Name, Logo, Title, Description, URL, Priority, Registration Date and Actions.
2. Use the **"Search"** field to filter the listing by customer name, title, or description.
3. Click the column headings to sort alphabetically or by priority.



2. Register a New Consumer or Client

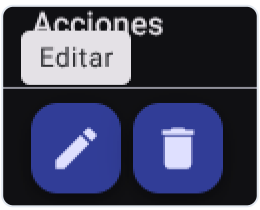
1. Click the **"Add Consumer"** button.
2. Fill in the requested information on the side panel:
    - **Name:** Company name or commercial name of the client.
    - **Title:** Descriptive heading or title of the reference.
    - **Logo (URL / File):** Official logo link or upload.
    - **Description:** Customer testimonial or success story.
    - **Link:** Official client web link (optional).
    - **Priority:** Integer number that defines the order of appearance on the public front page.



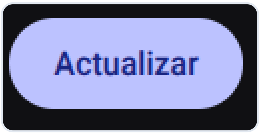
3. Click **"Add"**.

3. Edit or Delete a customer

1. Locate the consumer in the table and click the edit button (pencil icon✏️) in the actions column.

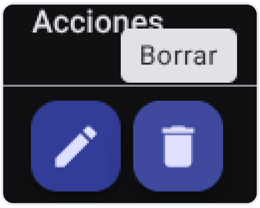


2. Modify the desired fields and save the changes to the **Save** button.



4. Delete a consumer

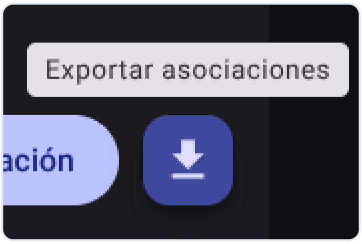
1. To unsubscribe a consumer, use the delete button (trash can icon🗑️) in the actions column.



2. confirm the action.

5. Export the Consumer Catalog

1. Click the download button (**Export Consumers**). A CSV/Excel file will be generated and downloaded with the complete list of clients and parameterized testimonials.



Required Technical Permits

- `consumer_read` : Allows you to view the catalog of registered consumers and clients.
- `consumer_create` : Authorizes the registration of new customer testimonials and logos.
- `consumer_update` : Enables editing of data, logos and appearance priorities.
- `consumer_delete` : Allows the removal of clients from the catalog.
- `consumer_export` : Allows the download of the consumer report.

Frequently Asked Questions and Help Center (CMS)

Description, Purpose and Objective

> **NOTE:** The **Frequently Asked Questions (FAQs)** view in the CMS is the manageable module designed to parameterize the common questions, quick guides and official answers presented in the support section of the public portal.
>
> A **Frequently Asked Questions (FAQ)** consists of a category or topic name, an identifying icon (Material Icons), the question asked by the user, the official response written by the organization and the priority level for its ordering on the screen.
>
> The objective of this module is to provide self-service information to end users, reducing the volume of repetitive requests to the help desk.

Context of Use

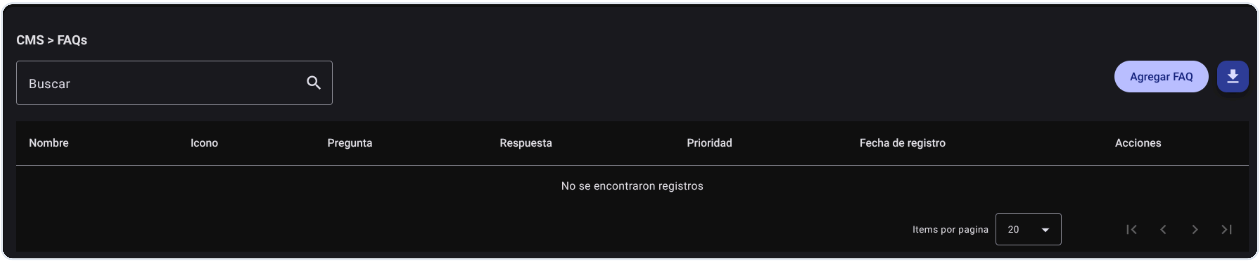
This module is used by:

- **Technical Support and Customer Service Agents:** To document responses to recurring questions raised by users.
- **Content and Communication Managers:** To structure and prioritize the most relevant help topics according to the season or product update.

Possible Actions

1. Consult the List of Frequently Asked Questions

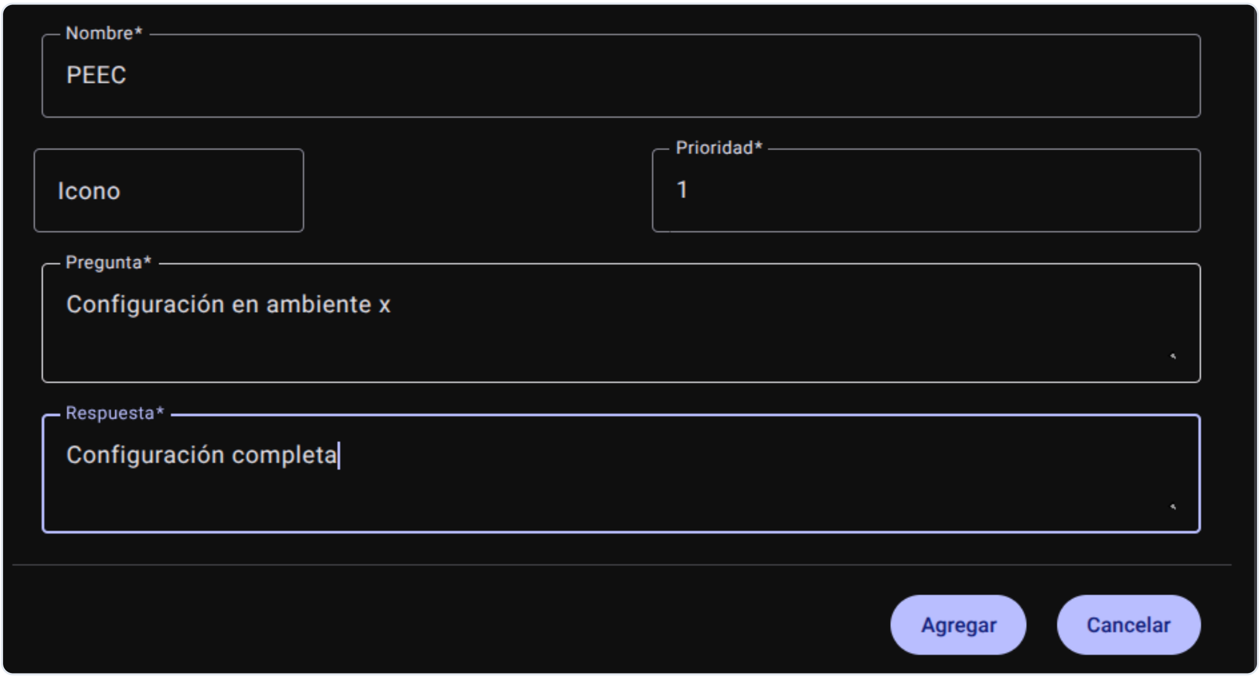
1. In the main FAQs table, view the records stored with the columns: Name (Category), Icon, Question, Answer, Priority, Record Date and Actions.
2. Use the **"Search"** field to filter questions or answers by keywords.
3. Sort columns by topic or display priority.



2. Register a New FAQ

1. Click the **"Add FAQ"** button.

2. Complete the information requested in the form on the side panel:
    - **Name:** Topic or category to which the question belongs (e.g. Account, Payments, Technical Support).
    - **Icon:** Name of the Material Icons icon to visually accompany the category.
    - **Question:** Clear and concise formulation of the user's concern.
    - **Answer:** Detailed explanation and step by step solution.
    - **Priority:** Numeric value to define the order in the portal drop-down list.

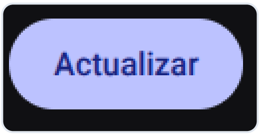


3. Click **"Add"**.

3. Edit an FAQ

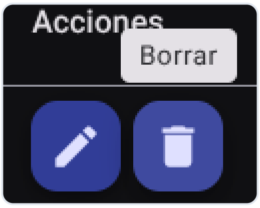
1.Locate the FAQ in the table and click the edit button (pencil icon) in the actions column.

2. Modify the desired fields and save the changes to the **Save** button.

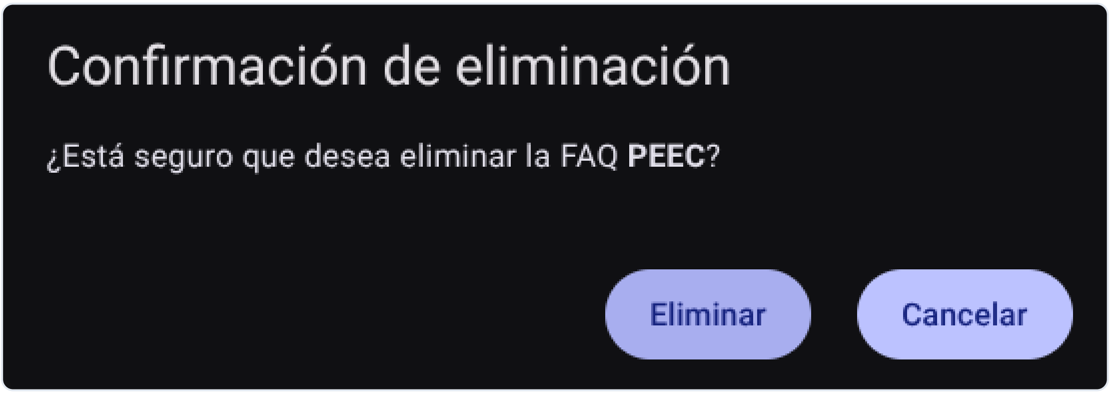


4. Delete an FAQ

1. To unsubscribe from an FAQ, use the delete button (trash can icon) in the actions column.

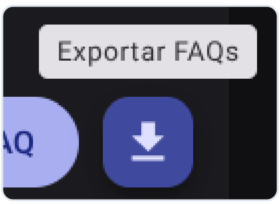


2. confirm the action.



5. Export the FAQ Registry

1. Click the **Export FAQs** button (download icon). A CSV/Excel file will be generated and downloaded with all the questions and answers configured.



Required Technical Permits

- `faq_read` : Allows you to consult the frequently asked questions catalog.
- `faq_create` : Authorizes the registration of new FAQs.
- `faq_update` : Enables editing of questions, answers, icons and priorities.
- `faq_delete` : Allows the removal of FAQs from the portal.
- `faq_export` : Allows downloading of the complete FAQ report.

Communication and Contact Channels (CMS)

Description, Purpose and Objective

> **NOTE:** The **Contact Information** view in the CMS is the module where the customer service channels, institutional telephone numbers, WhatsApp links, physical addresses and support emails displayed on the public front page are managed.
>
> A **Contact Channel** defines the name of the channel, descriptive title, representative icon (Material Icons), type of contact (e.g. Telephone, Email, WhatsApp, Location), descriptive text or value of the contact data, direct web link (URL) and sorting priority.
>
> The objective of this module is to offer visitors to the public portal immediate and updated means of communication with the company's support, sales and administration staff.

Context of Use

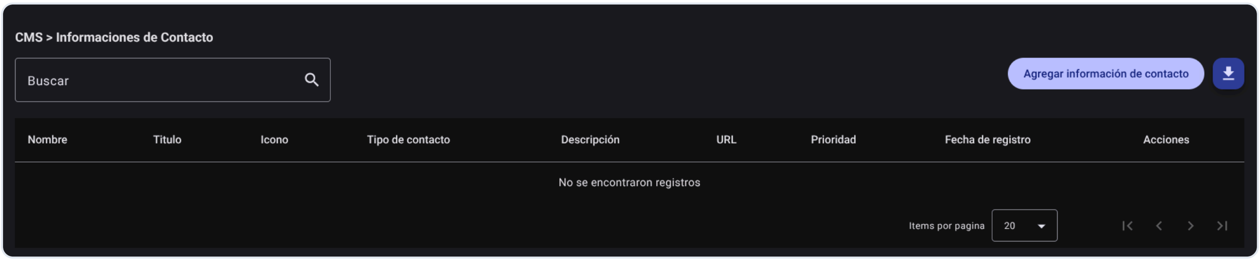
This module is used by:

- **Operations and Customer Service Administrators:** To update phone lines, support chat links or institutional emails.
- **System Administrators:** To enable or suspend service channels according to operational availability.

Possible Actions

1. Consult the List of Contact Channels

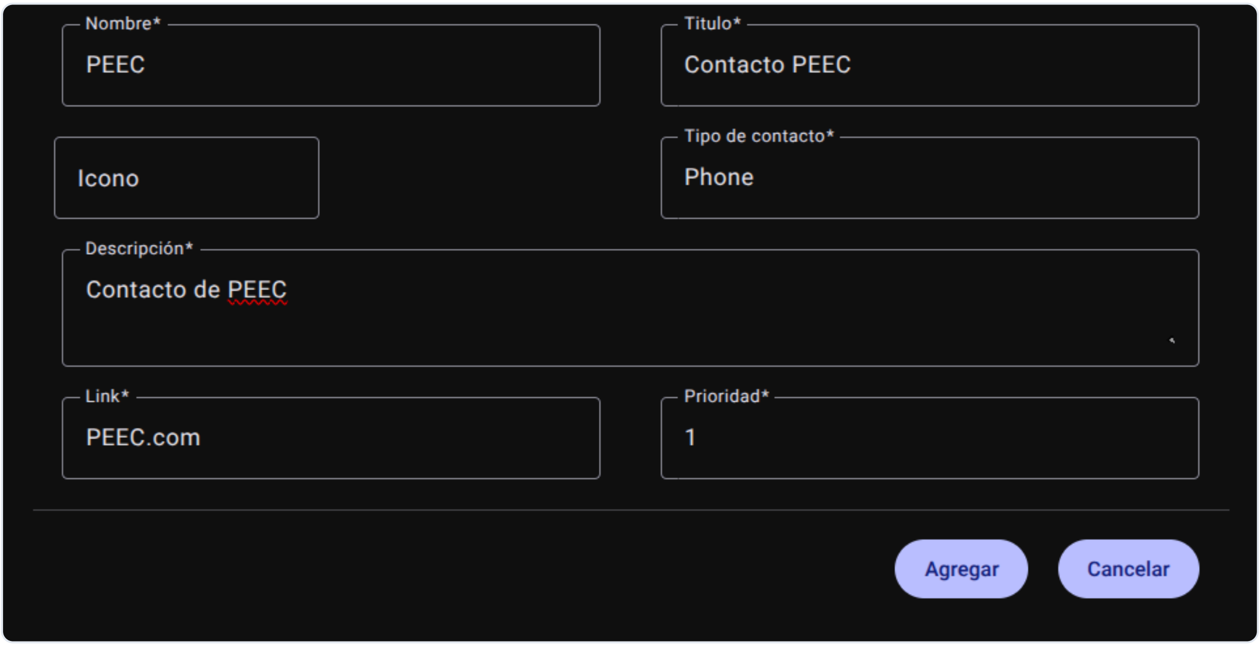
1. In the main administration table, display the contact channels with the columns: Name, Title, Icon, Contact Type, Description, URL, Priority, Registration Date and Actions.
2. Use the **"Search"** field to filter channels by type (e.g. WhatsApp, Email), name or description.
3. Sort the rows according to the level of attention priority.



2. Register a New Contact Channel

1. Click the **"Add Contact Information"** button.

2. Fill out the required fields on the side panel form:
    - **Name:** Channel identifier (e.g. WhatsApp Attention, Support Email, National Line).
    - **Title:** Explanatory header of the channel.
    - **Icon:** Name of the icon from the Material Icons library (e.g. `phone`, `email`, `whatsapp`).
    - **Type of contact:** Classification of the communication channel (Phone, Email, Social Network, Location).
    - **Description:** Telephone number, email address or informative text of the channel.
    - **URL:** Direct action link (e.g. `https://wa.me/...` or `mailto:...`).
    - **Priority:** Integer to determine the position of the channel in the footer or contact section.

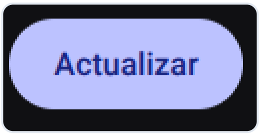


3. Save the record by clicking **"Save"**.

3. Edit a Contact Channel

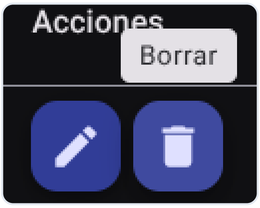
1. Locate the channel in the table and click the edit button (pencil icon✏️) in the actions column.

2. Modify the desired fields and save the changes to the **Save** button.

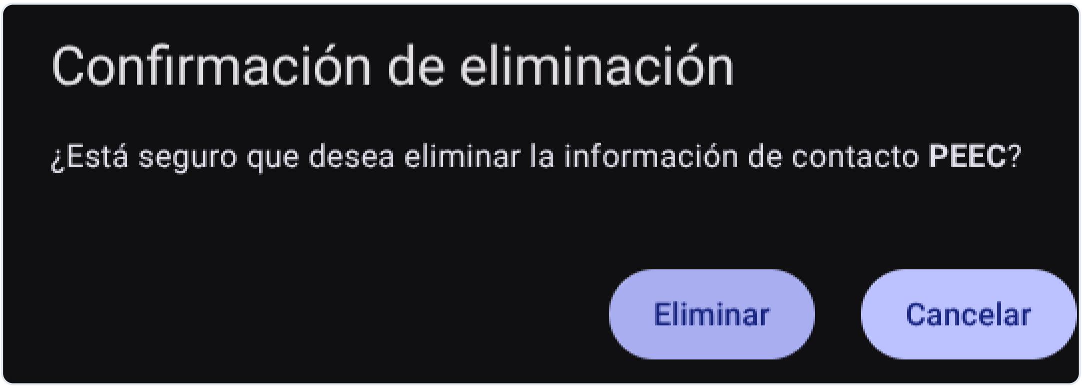


4. Delete a Contact Channel

1. To delete a caal, use the delete button (trash can icon🗑️) in the actions column.

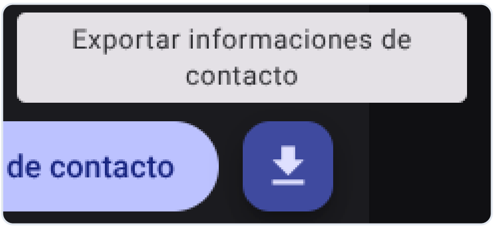


2. confirm the action.



5. Export the Contact Channel Catalog

1. Click the **Export contact information** button (download icon). You will obtain a report in CSV/Excel format with the complete inventory of configured contact channels.



Required Technical Permits

- `contact_info_read` : Allows you to consult the configured contact channels.
- `contact_info_create` : Authorizes the addition of new service channels on the platform.
- `contact_info_update` : Enable updating phone data, emails, icons and priorities.
- `contact_info_delete` : Allows you to unpublish or delete contact channels.
- `contact_info_export` : Allows downloading of the complete contact information report.

Institutional Information (About Us)

Description, Purpose and Objective

> **NOTE:** The **About Us** view in the CMS is the administrative module in charge of managing the main institutional content that is displayed on the public landing page (*landing page*) of the platform.
>
> The **About Us** section defines the organizational identity through a representative name, a title or main slogan, an institutional descriptive text and an external link to additional corporate resources.
>
> The objective of this module is to allow an agile and centralized update of the official presentation of the company without requiring modifications to the source code.

Context of Use

This module is used by:

- **Content and Communication Managers:** To update the value proposition, institutional mission or general description of the organization.
- **System Administrators:** To adjust the official corporate links presented on the public front page of the portal.

Possible Actions

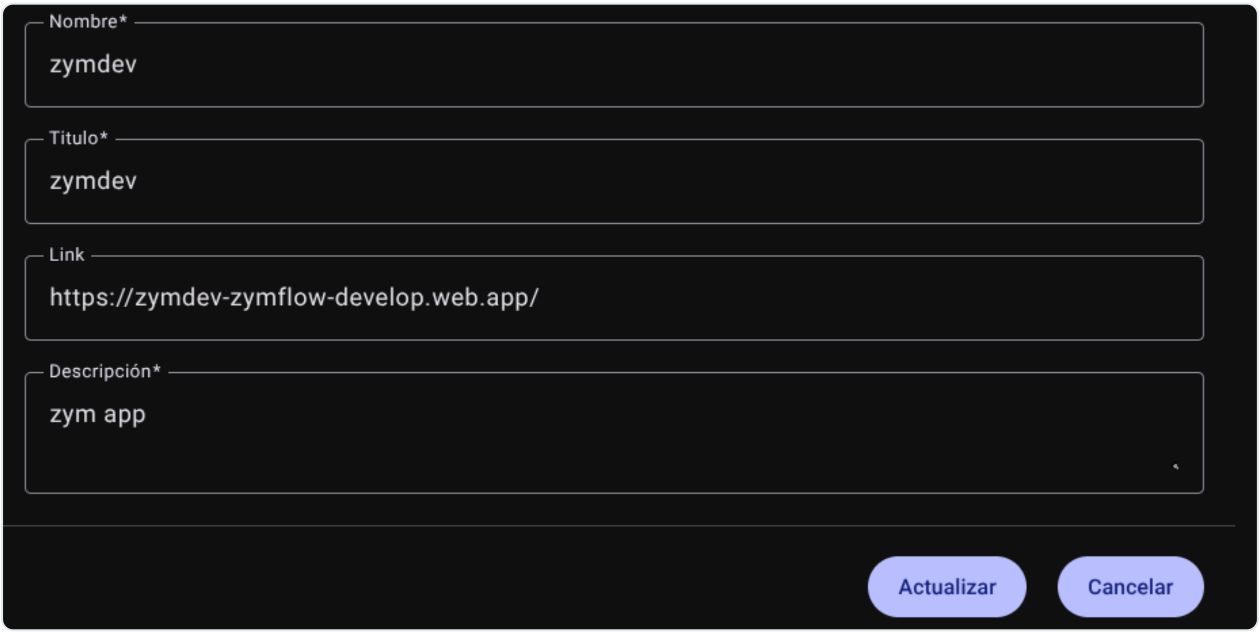
1. View Current Institutional Information

1. Upon entering the module, a central information card is presented with the data currently published:
    - **Name:** Official name of the entity or product line.
    - **Title:** Slogan or main heading visible on the cover.
    - **Description:** Detailed institutional text (up to 140 characters).
    - **Link:** External web link configured to expand the information.

2. Modify Institutional Information

1. In the upper right corner of the card, click the edit button (pencil icon).

2. The **Edit Form** side panel will be displayed with the following fields:
   - **Name:** Required text field.
   - **Title:** Required text field.
   - **Link:** Optional corporate redirect URL.
   - **Description:** Text area required for the institutional description (maximum 140 characters).



3. Click the **"Update"** button to apply the changes to the public front page.

4. If you want to discard the modifications without saving, click **"Cancel"**.

Required Technical Permits

- `about_us_read`: Allows reading and viewing current institutional information.
- `about_us_update`: Authorizes the modification and update of the text, title and link of the About Us section.

Digital Product Catalog (CMS)

Description, Purpose and Objective

> **NOTE:** The **Digital Products** view in the CMS is the module that manages the catalog of software, applications, licenses or digital solutions displayed on the organization's public website.
>
> A **Digital Product** includes the name of the system or application, commercial title, distinctive icon (Material Icons), detailed description of features, access link or landing of the product, demonstration video URL and ordering priority.
>
> The objective of this module is to position the company's suite of technological products, making it easier for visitors to explore its functionalities and access demos or official sites.

Context of Use

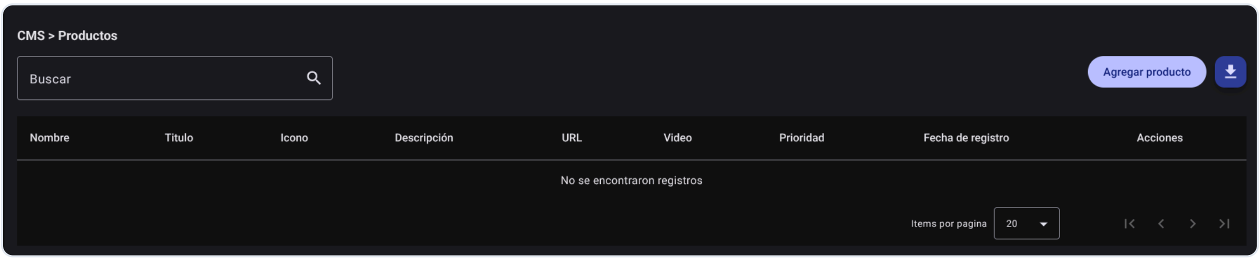
This module is used by:

- **Product and Marketing Managers:** To add new digital products to the web catalog, update features from recent versions or embed demo videos.
- **System Administrators:** To define the visual priority and availability of products on the cover.

Possible Actions

1. Consult the Product Catalog

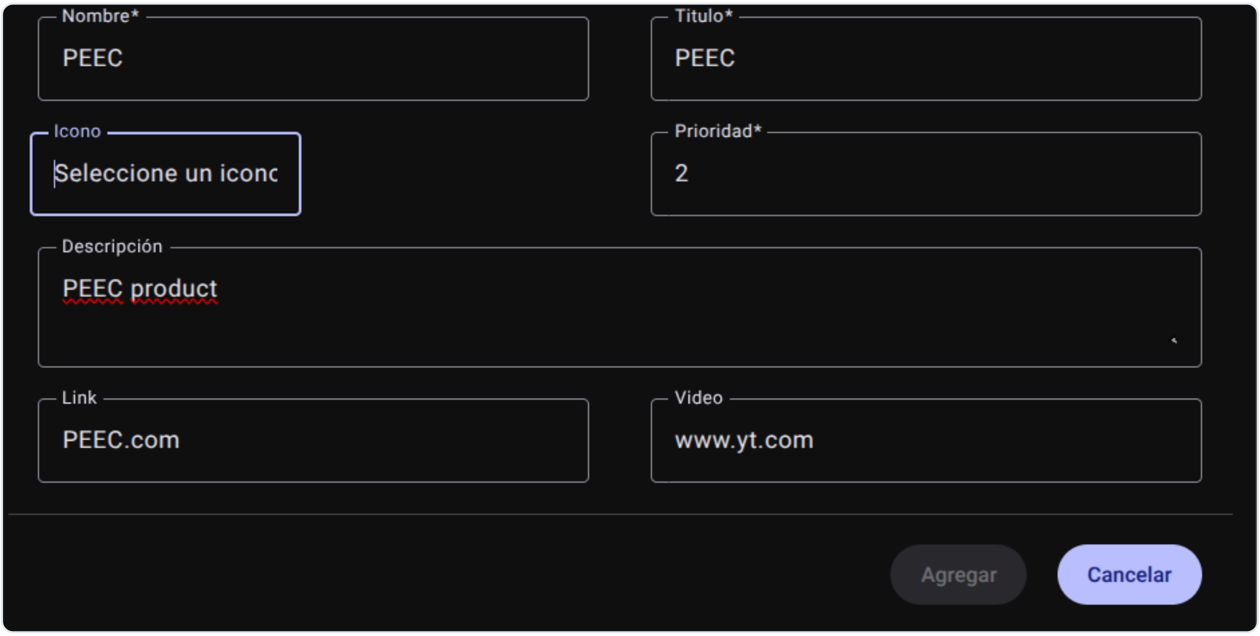
1. In the product management table, review the columns: Name, Title, Icon, Description, URL, Video, Priority, Registration Date, and Actions.
2. Filter using the **"Search"** text box for any product term.
3. Sort the rows by display priority or by creation date.



2. Register a New Digital Product

1. Click the **"Add Product"** button.

2. Fill in the required information on the side panel:
   - **Name:** Commercial name of the digital product (e.g. Labcare Cloud, My Process, PEEC).
   - **Title:** Slogan or main value proposition of the product.
   - **Icon:** Icon identifier for the Material Icons library.
   - **Description:** Detailed descriptive text with the modules and scope of the product.
   - **URL:** Link to the specific page or product login (optional).
   - **Video:** Promotional or tutorial video URL (optional).
   - **Priority:** Integer number that defines the positioning order in the public portal.

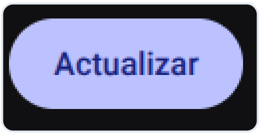


3. Click **"Add"**.

3. Edit a Product

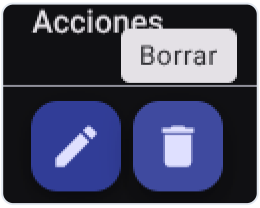
1. Locate the product in the table and click the edit button (pencil icon✏️) in the actions column.

2. Modify the desired fields and save the changes to the **Save** button.



4. Delete a Product

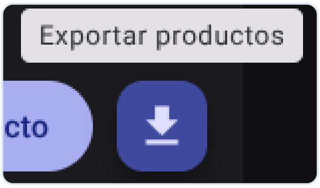
1. To delete a product, use the delete button (trash can icon 🗑️) in the actions column.



2. Confirm the action.

5. Export the Product Catalog

1. Click on the button with the download icon (**Export products**), a file in CSV format will be generated and downloaded with the complete list of registered digital products.



Required Technical Permits

- `product_read` : Allows you to consult the digital product catalog.
- `product_create` : Authorizes the registration of new products on the platform.
- `product_update` : Enables updating product data, links, videos and icons.
- `product_delete` : Allows you to remove products from the public catalog.
- `product_export` : Allows downloading of the massive product report.

Catalog of Published Services (CMS)

Description, Purpose and Objective

> **NOTE:** The **Published Services** view in the CMS is the module where the offer of technological, professional or consulting services displayed on the platform's public portal is managed.
>
> A **Published Service** includes the name of the service, descriptive title, representative icon (Material Icons), detailed description of the scope, explanatory web link, URL of the demonstration video and order of visual priority.
>
> The objective of this module is to offer a configurable digital showcase of the solutions and services offered by the organization to its clients and users.

Context of Use

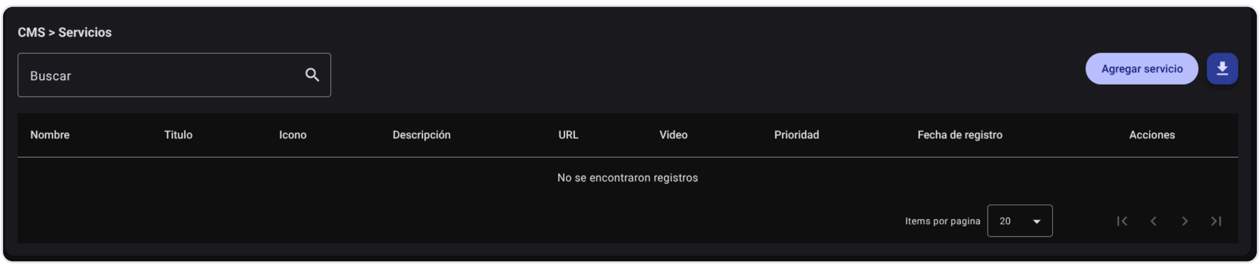
This module is used by:

- **Product and Marketing Managers:** To publish new services, update commercial descriptions or link demo videos and explanatory resources.
- **System Administrators:** To order or disable services according to the current commercial strategy.

Possible Actions

1. Consult the Service Catalog

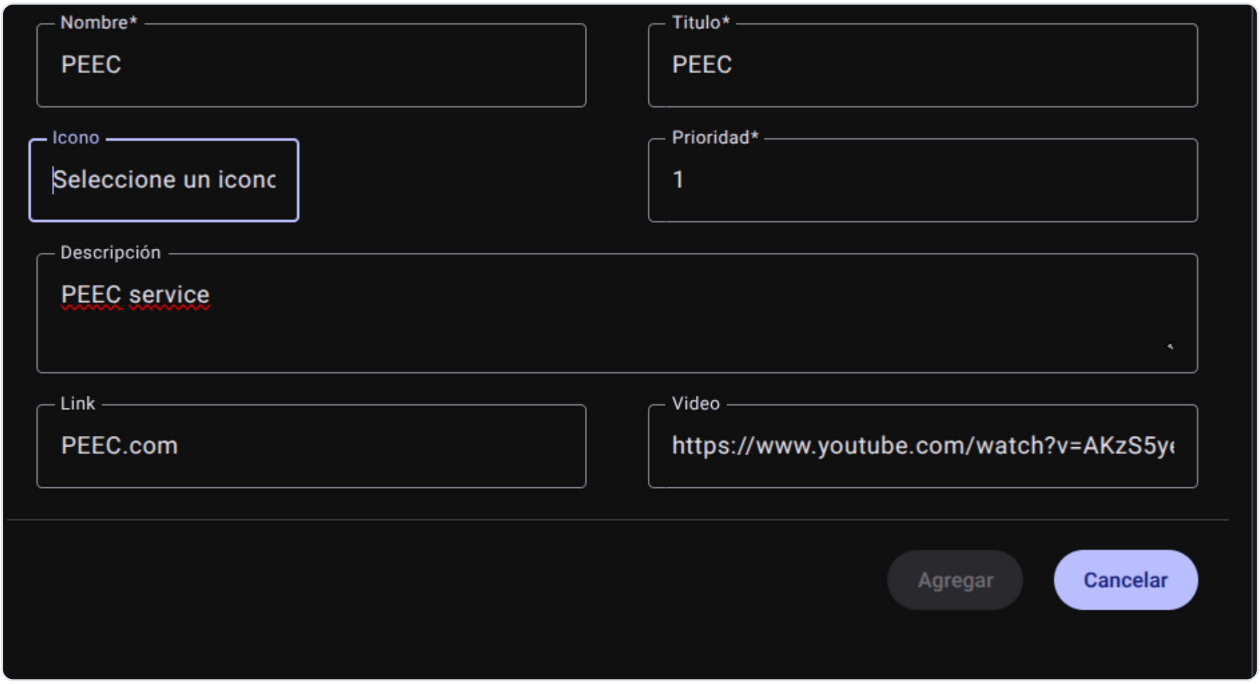
1. In the service management table, see the columns: Name, Title, Icon, Description, URL, Video, Priority, Registration Date and Actions.
2. Filter using the **"Search"** text box by service name, title, or key terms.
3. Sort the rows by priority level or registration date.



2. Register a New Service

1. Click the **"Add Service"** button.

2. In the drop-down side panel, fill out the form fields:
   - **Name:** Service identifier name.
   - **Title:** Slogan or short heading of the service.
   - **Icon:** Name of the Material Icons icon for the cover.
   - **Description:** Explanatory detail of the value proposition of the service.
   - **URL:** Link to the detailed or service contracting page (optional).
   - **Video:** Explanatory video URL (YouTube/Vimeo) (optional).
   - **Priority:** Number assigned to order the appearance on the public front page.

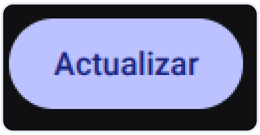


3. Save the changes using the **"Add"** button.

3. Edit a Service

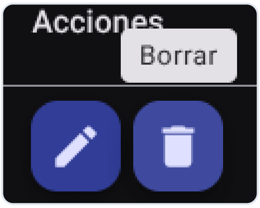
1. Locate the service in the table and click the edit button (pencil icon✏️) in the actions column.

2. Modify the desired fields and save the changes with the **Actualizar** (Update) button.



4. Delete a Service

1. To delete a service, use the delete button (trash can icon🗑️) in the actions column.



2. Confirm the action.

5. Export the Service Catalog

1. Click on the button with the download icon (**Exportar servicios**), a CSV file will be generated and downloaded with the complete list of registered services.

Required Technical Permits

- `services_read` : Allows you to consult the catalog of published services.
- `services_create` : Authorizes the registration of new services in the portal.
- `services_update` : Enables editing of names, descriptions, icons, videos and priorities.
- `services_delete` : Allows you to remove services from the official catalog.
- `services_export` : Authorizes the download of the service report in CSV.

Setting Custom System Attributes

Description, Purpose and Objective

> **NOTE:** The **Custom System Attributes** view is the advanced management console designed to structure, customize and manage the general dynamic attributes and configuration parameters (`config`) assigned to each product in the system.
>
> The purpose of this module is to allow administrators to make the platform forms more flexible, allowing metadata and global variables to be added without altering the source code of the application. Its objective is to enable each product (such as LABCARE_CLOUD, PEEC or QUATTROL) to inherit dynamic behaviors, custom validations and specific controls adapted to the operational needs of the organization.

Context of Use

This panel is operated in the system control routine by:

- **Product and Platform Support Administrators:** To add control fields to standard modules (e.g. add mandatory attributes in the registration of users or organizations) and define global variables for the behavior of the tools.
- **System Coordinators:** To audit the data types assigned to each menu, configure initial licensing defaults, and disable obsolete legacy structures.

Possible actions

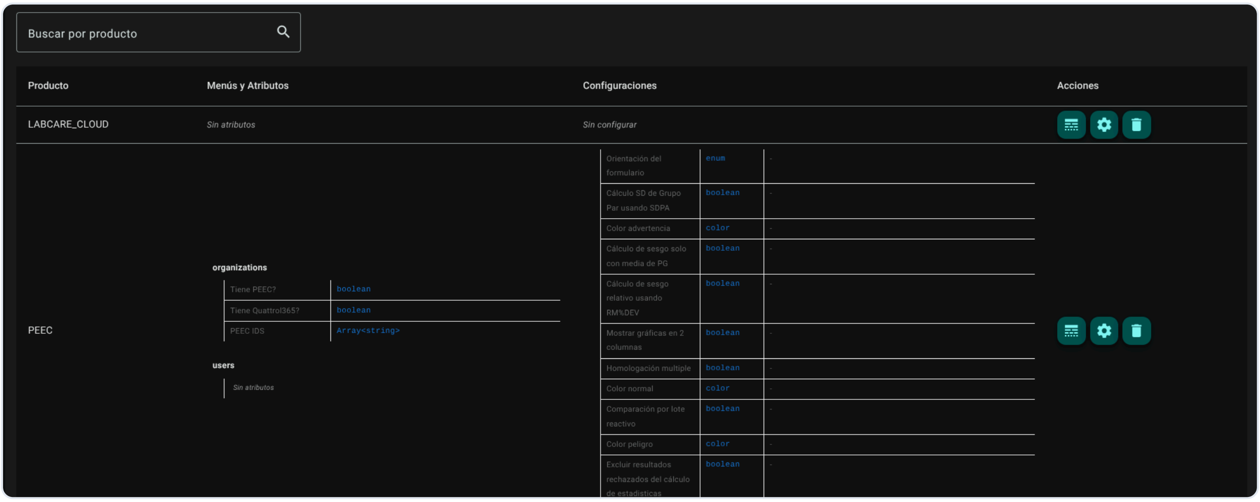
Follow the operation procedures to manage the system parameter grid:

1. Query and Display of Attributes by Product

To examine custom properties for applications:

1. **Filter by Product:** Locate the top search bar **Search by product...** and enter the name of the product of interest to isolate its records in the table.
2. **Table structure:** The main grid organizes the information into three control columns:
    - **Product:** Displays the technical identifier name of the application (e.g. *LABCARE_CLOUD*, *PEEC*, *QUATTROL*).
    - **Menus and Attributes:** Displays the menu folders hierarchically (e.g. *organizations*, *users*) detailing the field identifier, visual label and the assigned data type (*boolean*, *Array*, etc.).

- **Settings:** Presents the global behavior parameters defined under the



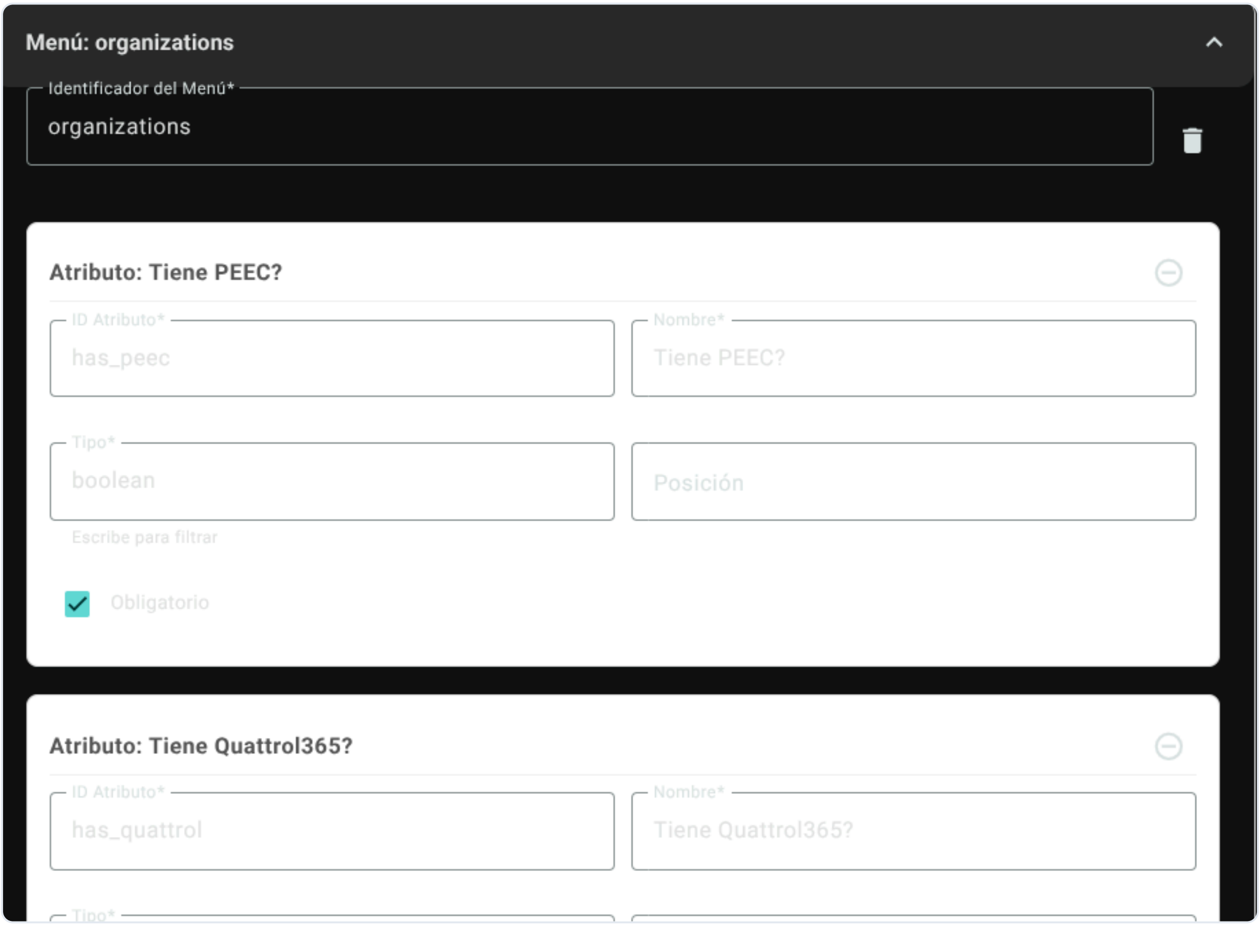
2. Edit General Attributes (Table/Menu Icon)

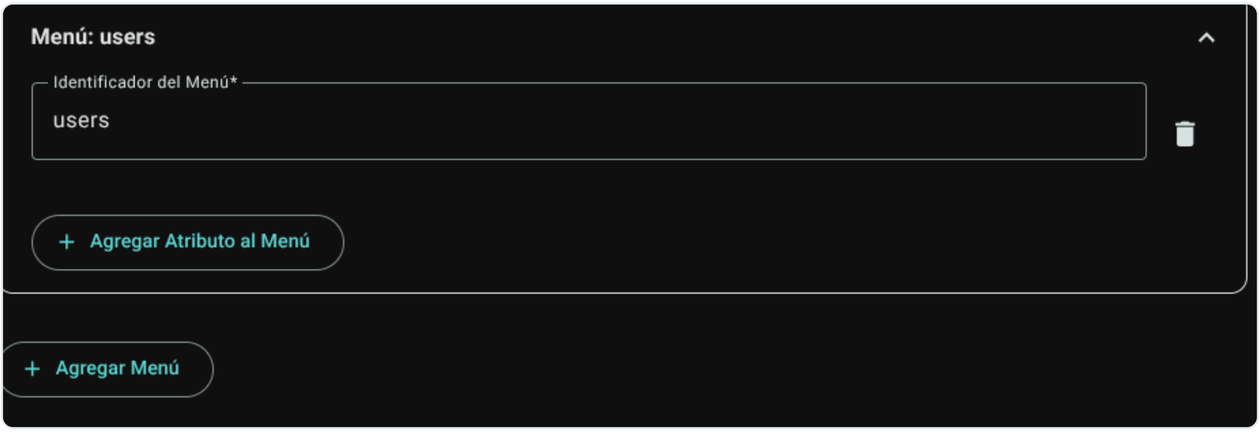
Allows you to modify the structure of custom fields that are injected into the product forms:

1. In the row of the desired product, locate the **Actions** column and click on the **Edit general attributes** table/menu icon.

2. The system will display the **Edit general attributes — [Product Name]** side panel. Configure the following sections:
   - *Menu Identifier:** Define or modify the technical name of the application menu (e.g. *organizations*, *users*).
   - **Menu attributes:** For each parameter in the list, set:
     - *Attribute ID*: Unique technical identifier of the field.
     - *Name*: Text label visible to the user.
     - *Type*: Type of form input (e.g. *boolean*, *text*, *number*, *select*).
     - *Position*: Numerical display order.
     - *Mandatory*: Check box to mark the mandatory completion.
   - **Add Attribute to Menu:** Click on this option to add a new attribute row within the selected menu block.
   - **Add Menu:** Press the button at the bottom of the panel if you require to create an additional menu folder.


Editar atributos generales — PEEC
El menú config se edita por separado.
Menús:
Menú: organizations
Menú: users
+ Agregar Menú
Guardar Cambios
Cancelar


Menú: organizations
Identificador del Menú*
organizations
Atributo: Tiene PEEC?
ID Atributo*
has_peec
Nombre*
Tiene PEEC?
Tipo*
boolean
Posición
Escribe para filtrar
Obligatorio
Atributo: Tiene Quattrol365?
ID Atributo*
has_quattrol
Nombre*
Tiene Quattrol365?
Tipo*



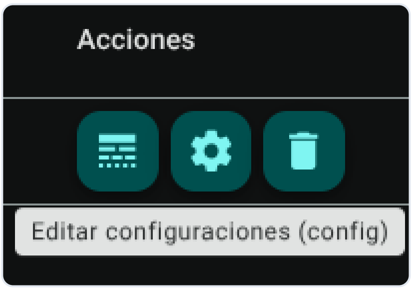
3. Once the parameters are completed, click the **Save Changes** button to apply and consolidate the product forms.

---

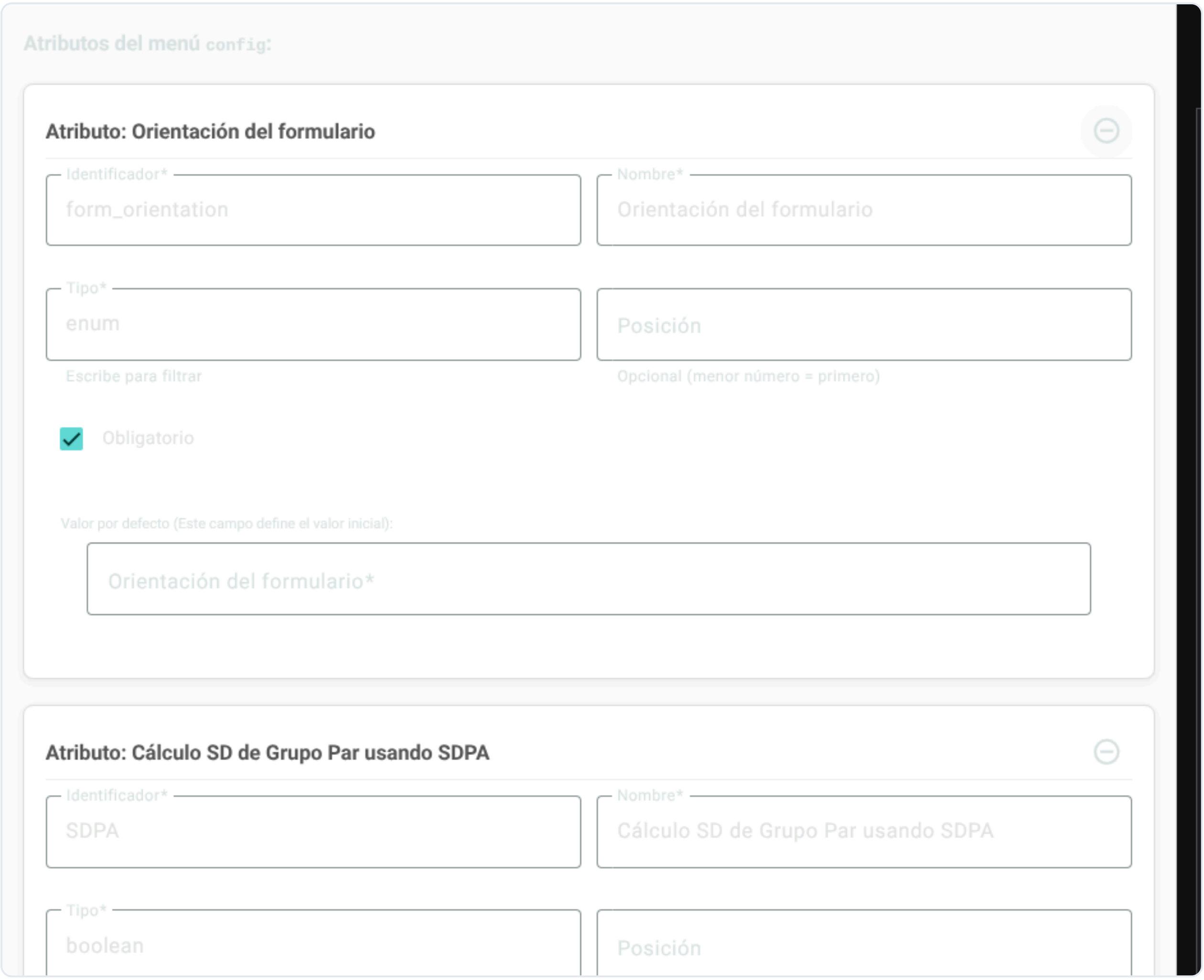
3. Edit Config Settings (Gear Icon)

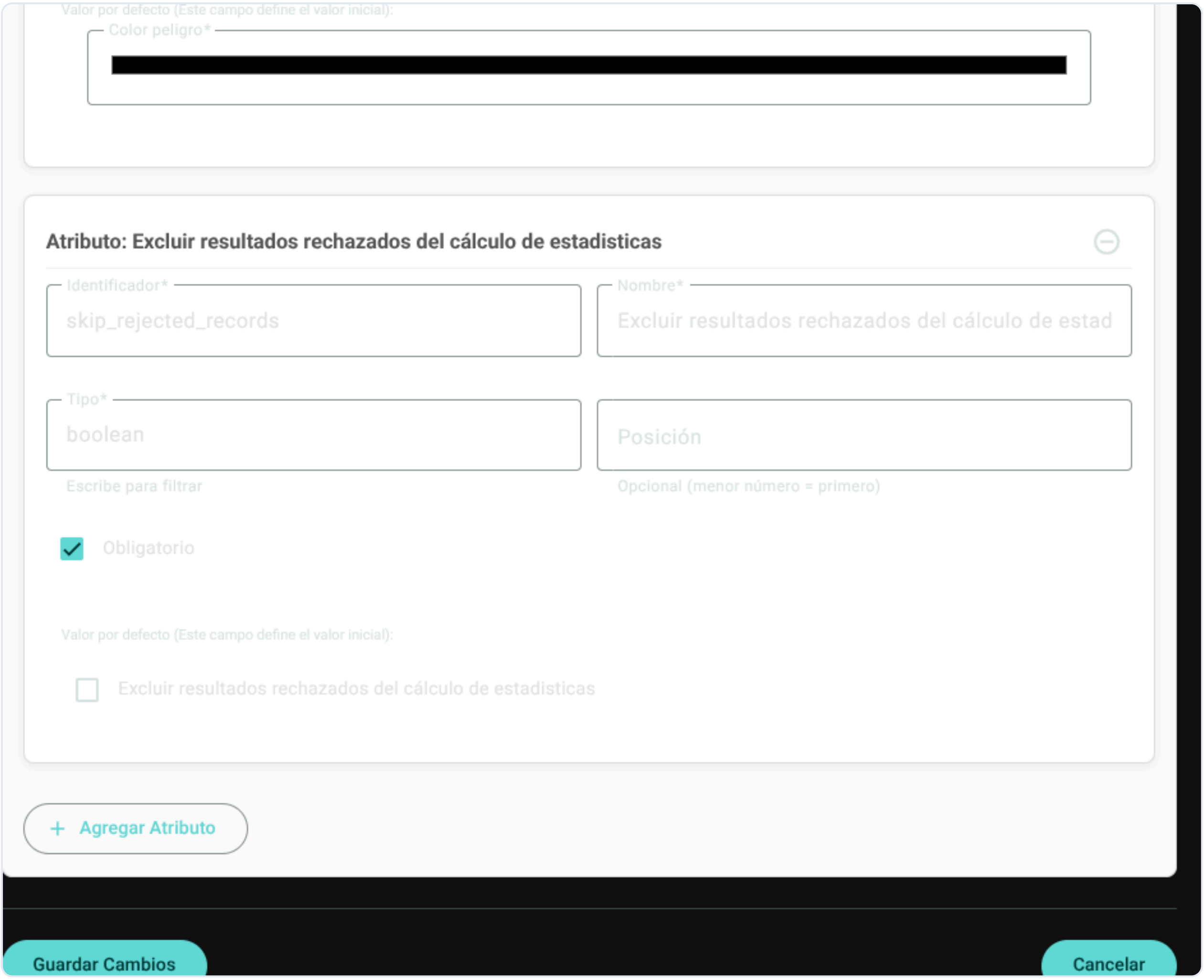
To parameterize system behavior variables and product default values:

1. In the corresponding product row, go to the **Actions** column and click the **Edit settings (config)** gear icon.



2. The **Edit configurations (config) — [Product Name]** side panel will be displayed:
   - Configure or edit the fields corresponding to each global variable (*Identifier*, *Name*, *Type*, *Position*, *Required*).
   - **Default Value:** Assign in the interactive cell the data with which the parameter will be initialized for the new organizations created.
   - **+ Add Attribute:** Press this button if you require to register an additional global configuration variable for the product.


Atributos del menú config:
Atributo: Orientación del formulario
Identificador*
form_orientation
Nombre*
Orientación del formulario
Tipo*
enum
Posición
Escribe para filtrar
Opcional (menor número = primero)
Obligatorio
Valor por defecto (Este campo define el valor inicial):
Orientación del formulario*
Atributo: Cálculo SD de Grupo Par usando SDPA
Identificador*
SDPA
Nombre*
Cálculo SD de Grupo Par usando SDPA
Tipo*
boolean
Posición



3. Click the **Save Changes** button in the footer to confirm the restructuring.

---

4. Delete Product / Attributes (Caneca Icon)

If you need to completely remove the customization assigned to a product from the system:

1. In the **Actions** column of the product row, click the **Delete Product** bin icon.

> **CAUTION:** Removing attribute settings from a product is a destructive and irreversible action. It can cause display failures or loss of metadata on organizational forms already in production using these fields.

Roles and Permissions Required

Management of dynamic system attributes and global variables is restricted under the following security profiles:

The roles authorized to interact with this panel are **General System Administrator** and **IT Support**.

- **Access and Viewing:**
  - `system_custom_attributes_read`: Allows read access to the `/general/system-custom-attributes` console and display of the table.
- **Management and Writing:**
  - `system_custom_attributes_create` /
- **Elimination:**
  - `system_custom_attributes_delete`: Grants privileges to permanently delete a product's custom attributes template using the can icon.

Tag Management (Tagging)

Description, Purpose and Objective

> **NOTE:** The **Tag Management** view is the module in charge of creating, consulting, editing, deleting and exporting visual tags for general system configuration.
>
> A **Tag** consists of the following key attributes:
>
> - **Name***: Label identification text.
> - **Description***: Detail of the purpose or rule for assigning the label.
> - **Color***: Sample or chromatic tone selected using a color palette to visually highlight the badge.
>
> The purpose of this view is to categorize and classify system logs using color visual badges.

Context of Use

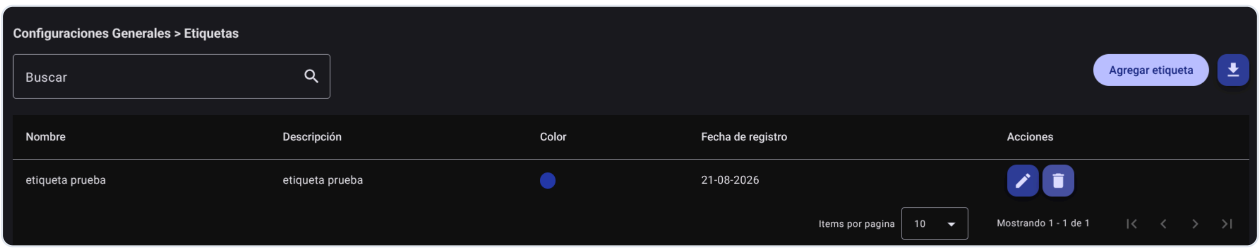
This module is used by system administrators to:

- **Create visual categories:** Define color badges to label records or entities.
- **Standardize visual identifiers:** Maintain an institutional color code for quick filtering and recognition.

Possible Actions

1. View and Filter Tags

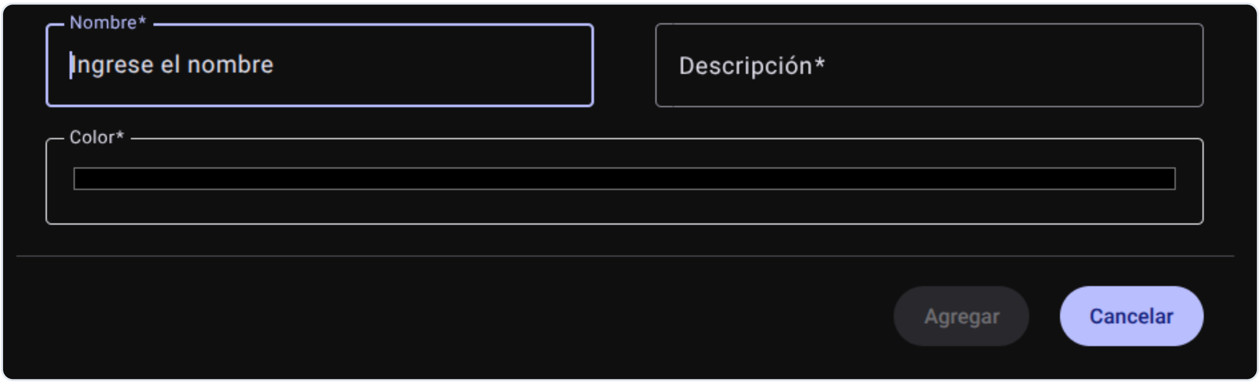
1. Use the search bar (**Search**) to locate specific tags by name or description.
2. Click on the column headers (**Name**, **Description**, **Record Date**) to sort the table in ascending or descending order.



2. Create a New Tag

1. Click the **Add Tag** button in the upper right corner.

2. In the drop-down side panel, fill out the required fields:
    - **Name***
    - **Description***
    - **Color*** (Click on the bar to open the color selector/palette and define the tone).

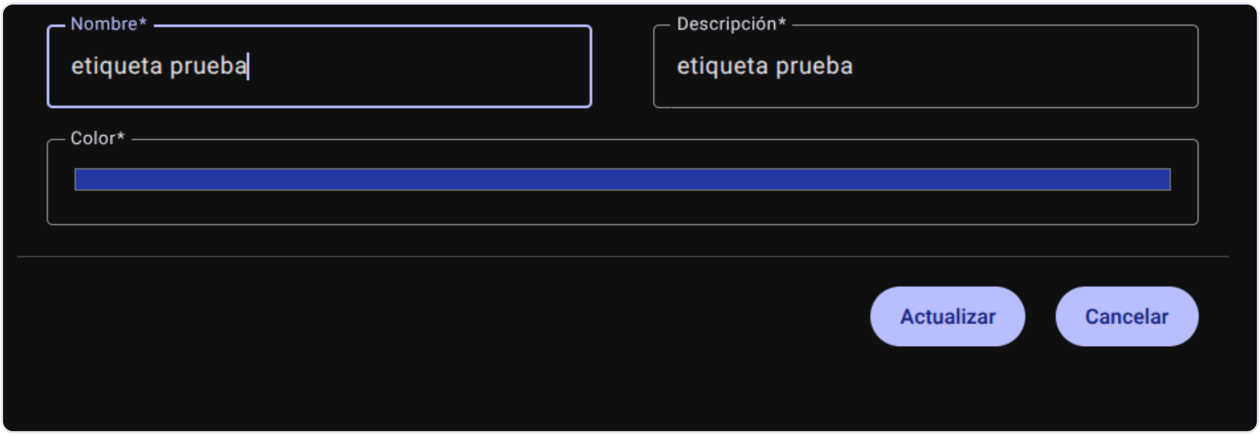


3. Press **"Add"** to save the record (or **"Cancel"** to close the panel without keeping the changes). The new label will be incorporated into the table showing a circular indicator with the chosen color.

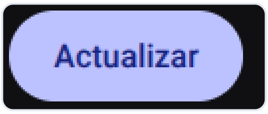
3. Edit an Existing Tag

1. In the row of the desired label within the main table, locate the **Actions** column. click **pencil (**Edit**).

2. Open the side panel with the loaded information to modify the data or the assigned color.

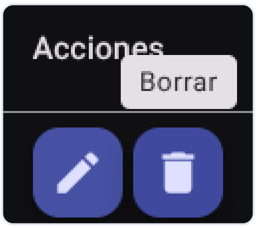


3. Press the **Update** button to save the changes to the system.

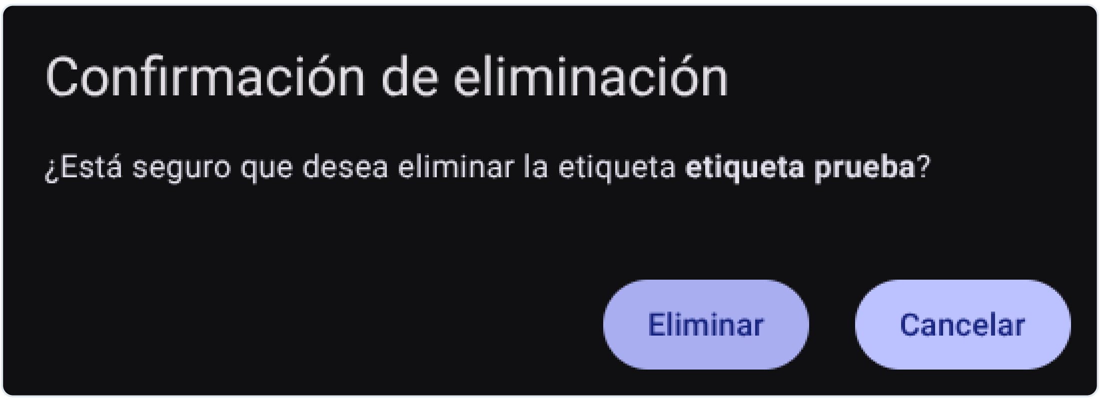


4. Delete a Tag

1. In the **Actions** column of the corresponding row, click **Trash Bin (**Delete**).

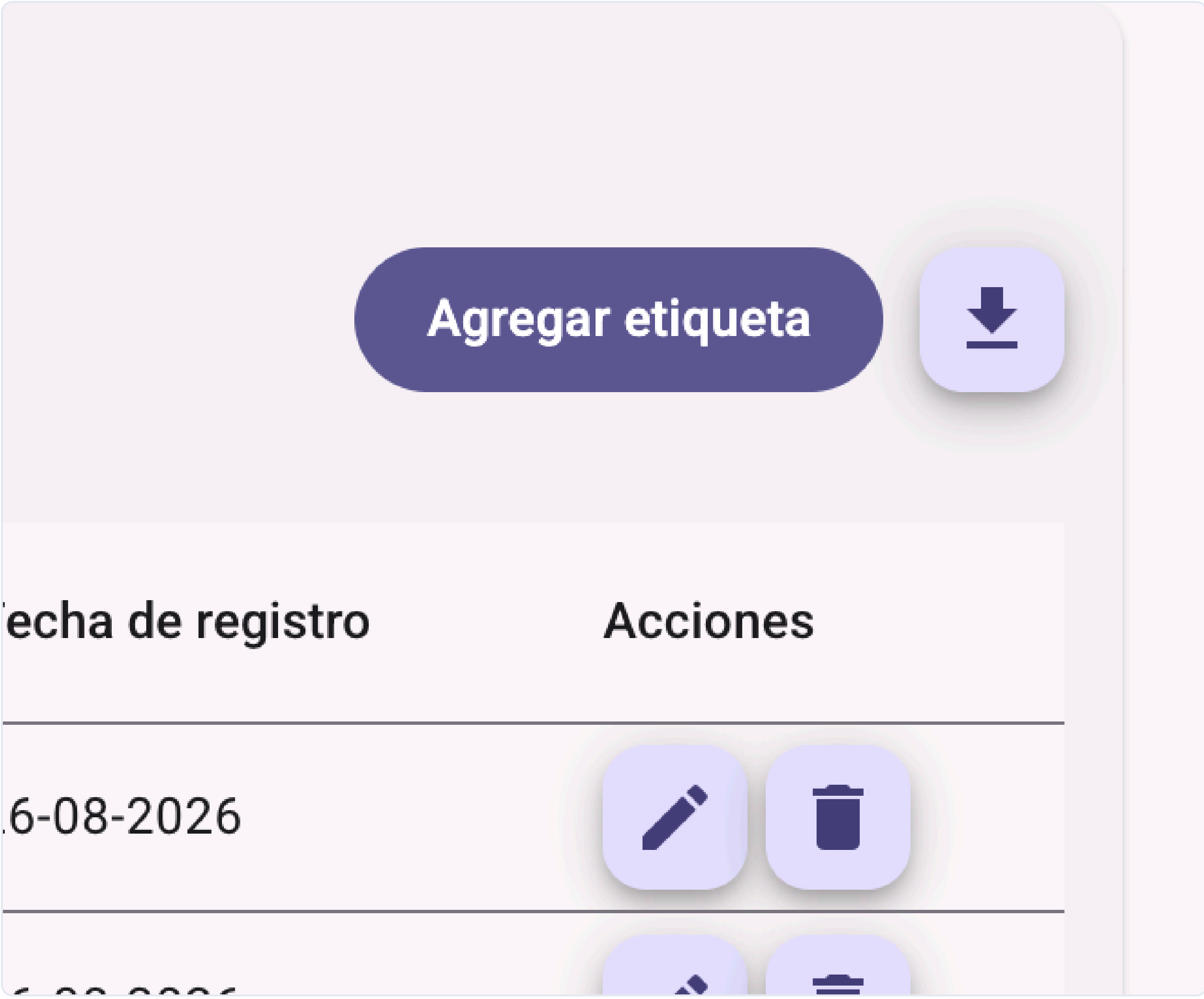


2. The system will display a direct confirmation box.



5. Export Tags

1. Click the blue button with download icon (**Export Tags**) located at the top right of the view.



2. The system will download the .csv file with the complete list of tags and chromatic settings.

Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

System Languages (Internationalization)

Description, Purpose and Objective

> **NOTE:** The **System Languages** view is the internationalization administrative console ($i18n$) in charge of creating, consulting, editing and deleting official languages supported in the platform's user interface.
>
> A **System Language** is made up of the following required fields:
>
> - **Name***: Official name of the language (e.g. *Spanish*, *English*).
> - **Abbreviation***: ISO language code of two or four characters (e.g. *es-es*, *en-us*).
>
> The objective of this module is to allow multilingual expansion of the system by managing the official localization options of the platform.

Context of Use

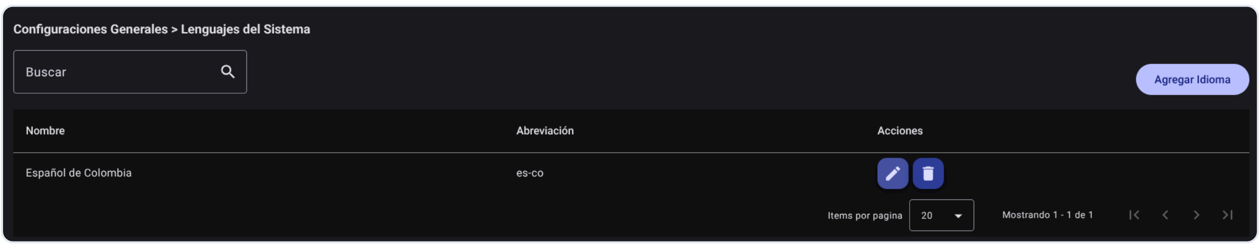
This module is used by system administrators to:

- **Activate new languages:** Register official languages and their ISO codes for platform localization.
- **Edit abbreviations:** Update localization codes and translation identifiers.

Possible Actions

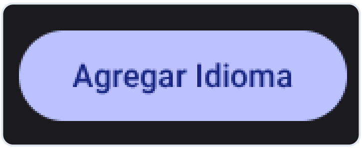
1. Check and Filter Languages

1. Use the search bar (**Search**) to locate specific languages by name or abbreviation.
2. Click on the column headers (**Name**, **Abbreviation**) to sort the table in ascending or descending order.



2. Create a New Language

1. Click the **"Add Language"** button in the upper right corner.

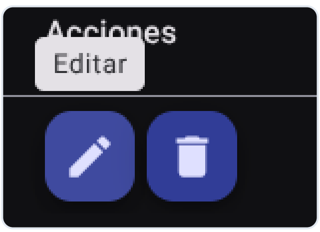


2. In the drop-down side panel, fill out the required fields:
    - **Name*** (Ex: *Spanish*).
    - **Abbreviation*** (Ex: *es-es*).

3. Press **"Add"** to save the record (or **"Cancel"** to close the panel without keeping the changes). The new language will be incorporated into the table list.

3. Edit an Existing Language

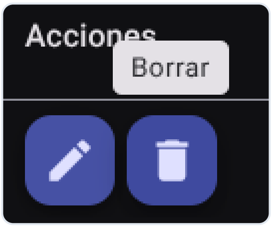
1. In the desired language row within the main table, locate the **Actions** column and click the pencil (**Edit**).



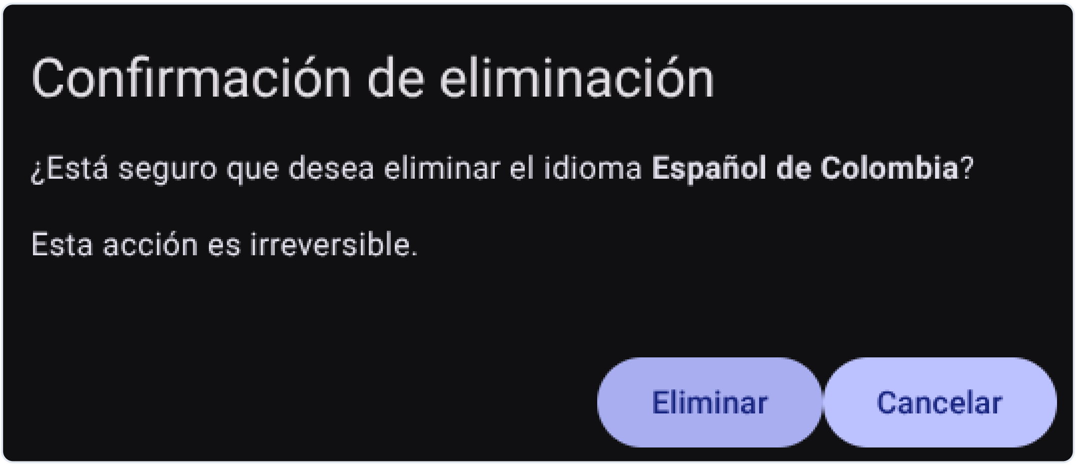
2. Open the side panel with the loaded information to modify the language name or abbreviation.
3. Press the **"Update"** button to save the changes to the system.

4. Delete a Language

1. In the **Actions** column of the corresponding row, click the trash bin (**Delete**).



2. The system will display a direct confirmation box



Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

Membership Administration

Description, Purpose and Objective

> **NOTE:** The **Membership Management** view is the module in charge of managing the licensing and payment plans applied to the different organizations registered on the platform.
>
> A **Membership** is a commercial subscription agreement that defines the duration of the service, trial days, cost, currency, billing period in days and the limits or products that the customer can use.
>
> The objective of this module is to centralize the management of plans and collections, allowing administrators to create, modify, apply or remove memberships, in addition to exporting organizational billing history.

Context of Use

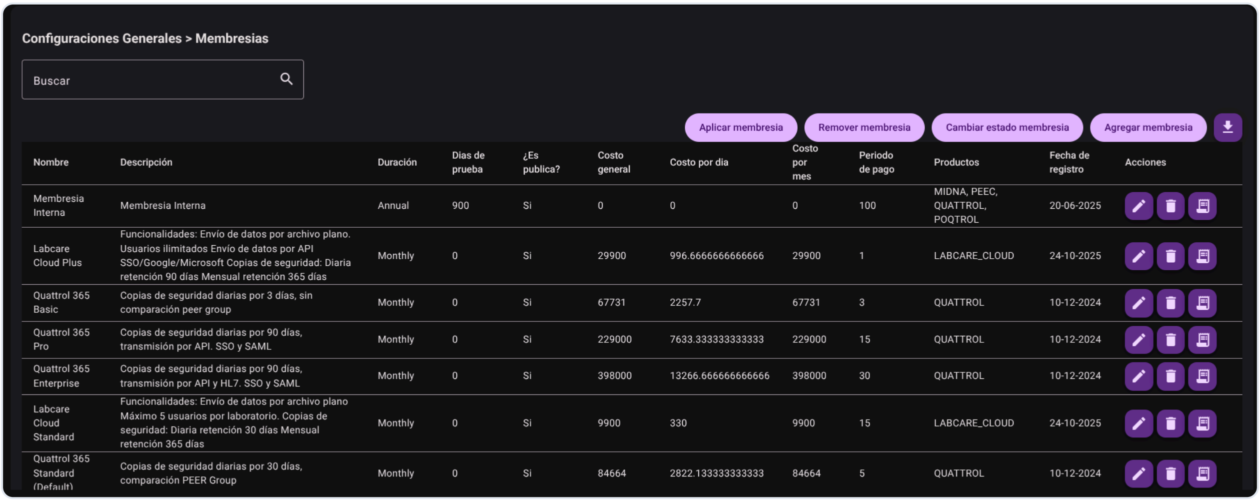
This module is used exclusively by global licensing administrators to:

- **Create new subscription plans:** Define standard rates (for example: Basic Plan, Pro Plan, Annual Plan) with parameterized costs and payment periods.
- **Assign licenses to clients:** Link a membership to one or more organizations to enable them access to the platform.
- **Control collections and billing:** Consult the amounts to be billed per month and export detailed reports for reconciliation with the accounting area.
- **Manage membership statuses:** Activate, deactivate or temporarily suspend organizations' access to services.

Possible Actions

1. View and List Memberships

Allows administrators to consult the catalog of memberships configured in the system, showing commercial details such as name, description, duration, trial days, whether it is public, cost per day and month, assigned products and registration date.

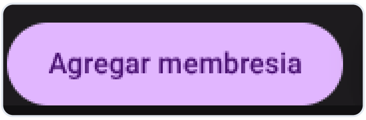


Nombre	Descripción	Duración	Dias de prueba	¿Es publica?	Costo general	Costo por dia	Costo por mes	Periodo de pago	Productos	Fecha de registro	Acciones
Membresia Interna	Membresia Interna	Annual	900	Si	0	0	0	100	MIDNA, PEEC, QUATTROL, POQTROL	20-06-2025	
Labcare Cloud Plus	Funcionalidades: Envío de datos por archivo plano. Usuarios ilimitados Envío de datos por API SSO/Google/Microsoft Copias de seguridad: Diaria retención 90 días Mensual retención 365 días	Monthly	0	Si	29900	996.6666666666666	29900	1	LABCARE_CLOUD	24-10-2025	
Quattrol 365 Basic	Copias de seguridad diarias por 3 días, sin comparación peer group	Monthly	0	Si	67731	2257.7	67731	3	QUATTROL	10-12-2024	
Quattrol 365 Pro	Copias de seguridad diarias por 90 días, transmisión por API. SSO y SAML	Monthly	0	Si	229000	7633.333333333333	229000	15	QUATTROL	10-12-2024	
Quattrol 365 Enterprise	Copias de seguridad diarias por 90 días, transmisión por API y HL7. SSO y SAML	Monthly	0	Si	398000	13266.666666666666	398000	30	QUATTROL	10-12-2024	
Labcare Cloud Standard	Funcionalidades: Envío de datos por archivo plano Máximo 5 usuarios por laboratorio. Copias de seguridad: Diaria retención 30 días Mensual retención 365 días	Monthly	0	Si	9900	330	9900	15	LABCARE_CLOUD	24-10-2025	
Quattrol 365 Standard (Default)	Copias de seguridad diarias por 30 días, comparación PEER Group	Monthly	0	Si	84664	2822.133333333333	84664	5	QUATTROL	10-12-2024	

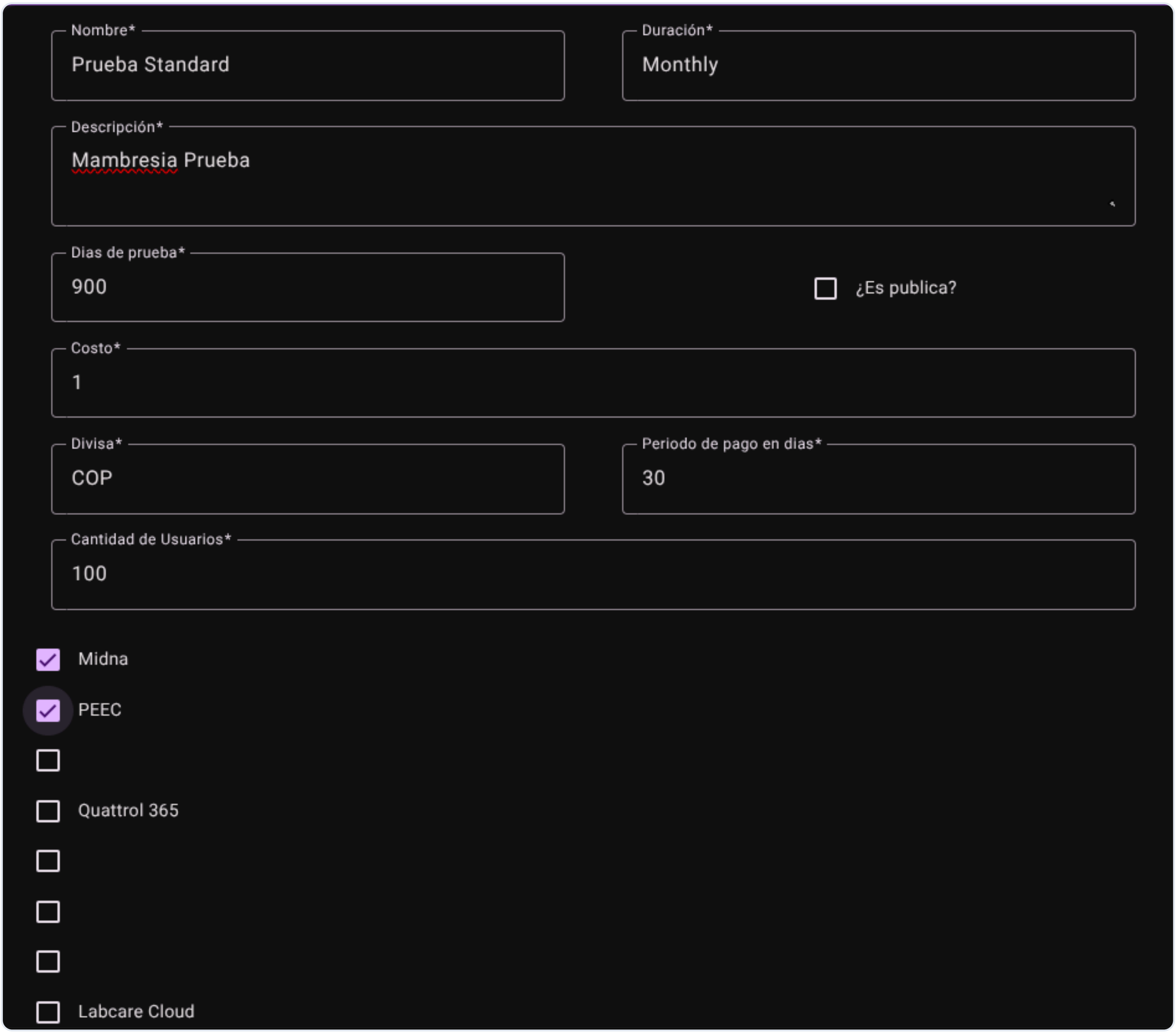
2. Add a New Membership

To create a new plan or subscription type:

1. Click the **"Add Membership"** button at the top right of the table.



2. Fill out the required fields in the creation form:
   - **Name:** Identification name of the membership (e.g. `Plan Premium Mensual`).
   - **Duration:** Name of the plan period (e.g. `Mensual`, `Anual`).
   - **Description:** Detail of what the subscription includes.
   - **Trial days:** Number of days of free access granted before the first charge.
   - **Is it public?:** Box that defines whether clients can view and select it autonomously from their panels.
   - **Cost:** Monetary value of the plan.
   - **Currency:** Type of currency in which the payment is made (e.g. `USD`, `COP`).
   - **Payment period in days:** Exact frequency with which the payment is calculated (e.g. `30` for monthly, `365` for annual).
   - **Number of users:** Maximum number of users allowed on the plan.
   - **Product management:** You can select the products associated with the subscription and add them to the + button.

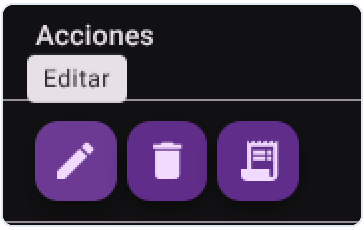


3. Click **"Add"** to register membership on the platform.

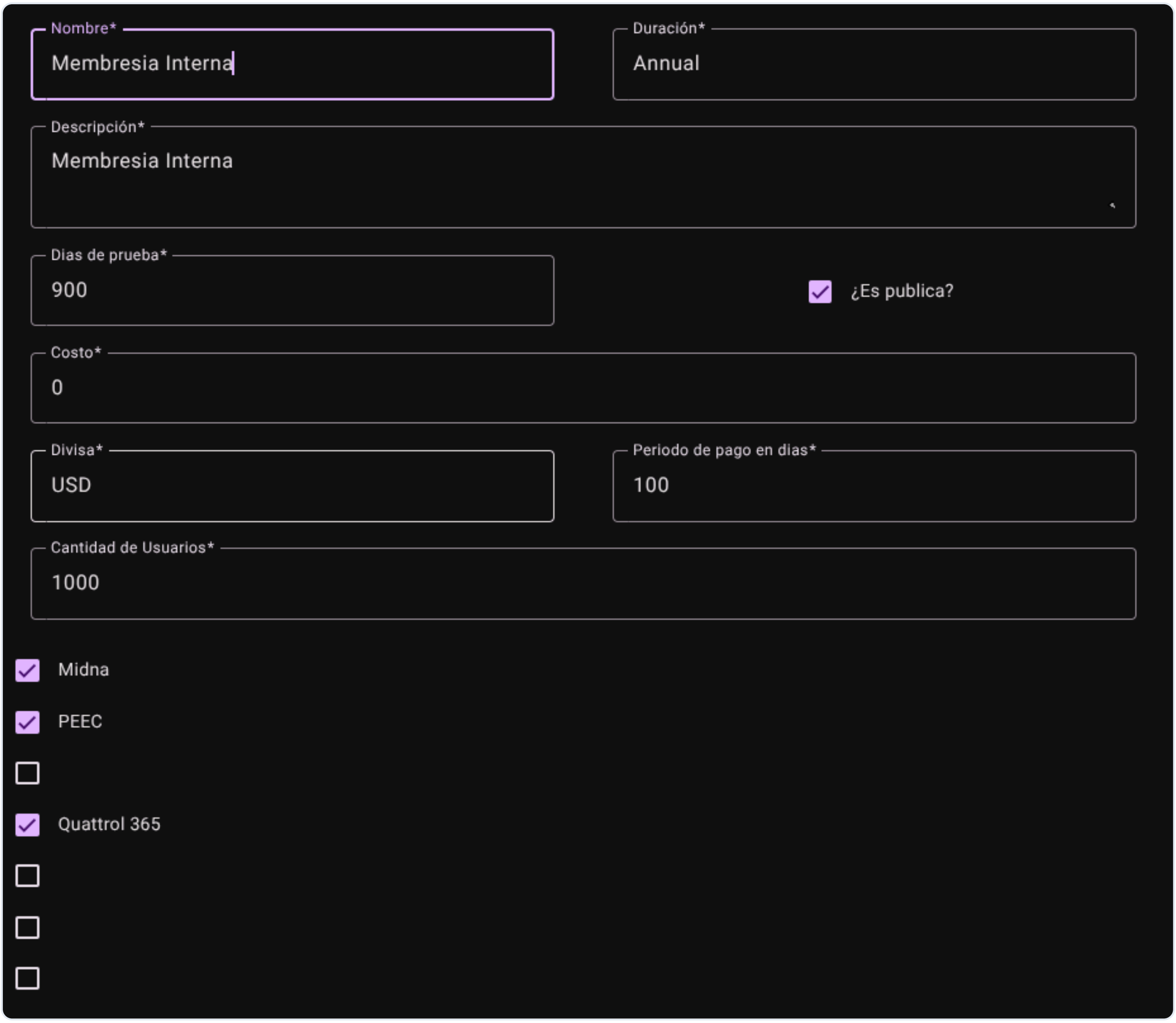
3. Edit a Membership

To update the trading terms of an existing membership:

1. Find the plan in the table and click **"Edit"** (pencil icon ✏️).



2. Modify the corresponding fields. There are no restrictions on changing the cost, description or duration.

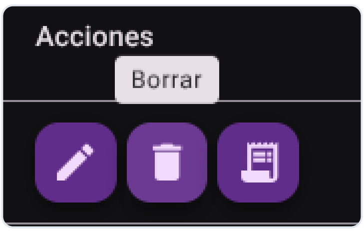


3. Click **"Update"** to apply the changes immediately.

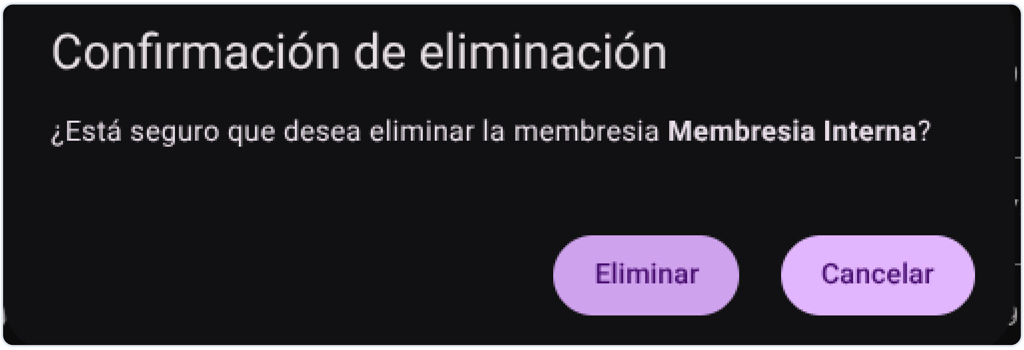
4. Delete a Membership

To definitively remove a subscription plan from the system catalog:

1. Click the trash icon (🗑️) for the corresponding plan.



2. Confirm the deletion in the pop-up warning modal.

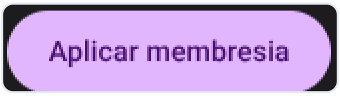


> **WARNING:** The deletion action is irreversible and will be rejected by the system if the membership is currently assigned to any active organization on the platform.

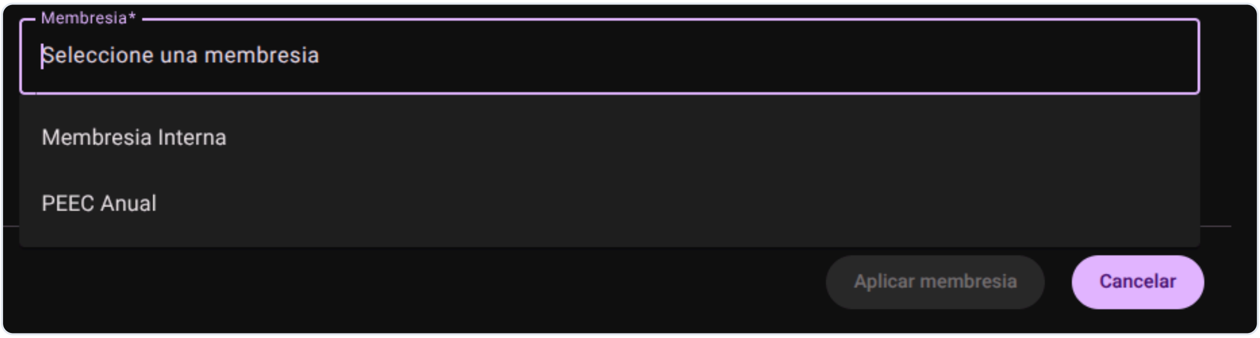
5. Apply Membership to Organizations

To associate a subscription with one or more client organizations:

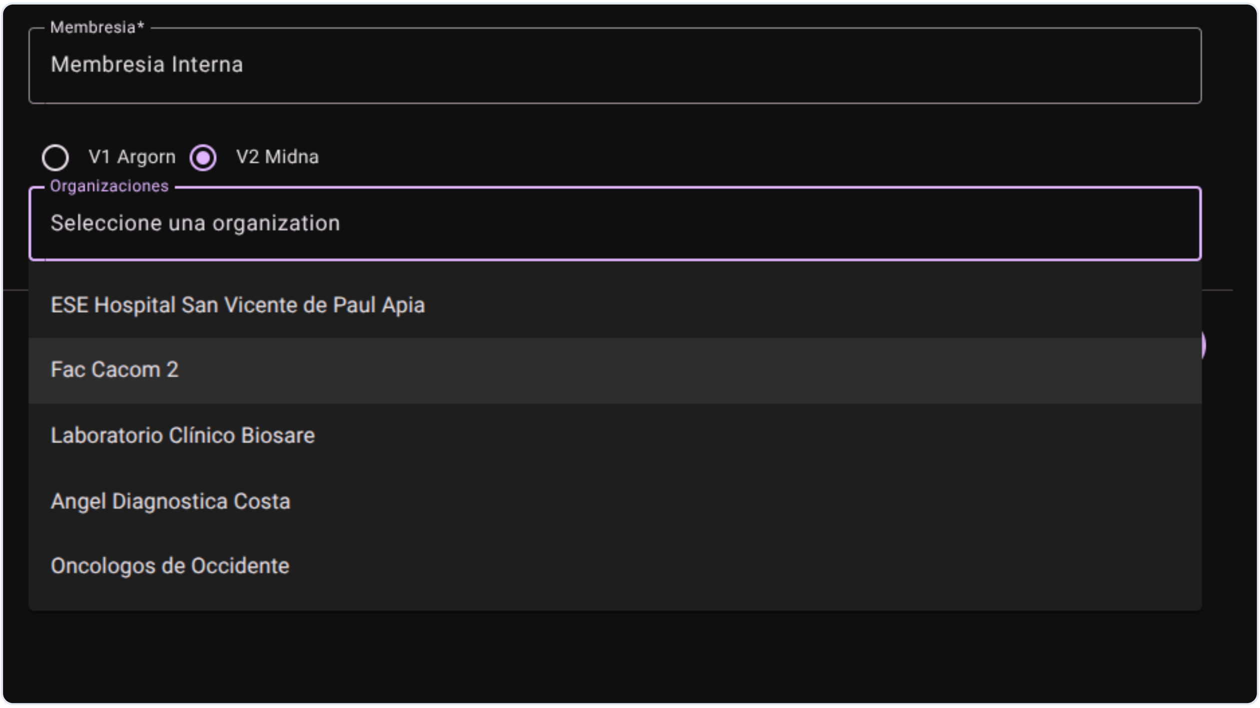
1. Click the **"Apply Membership"** button at the top of the panel.



2. Select the desired membership from the drop-down list.



3. Search and select one or more recipient organizations from the list.



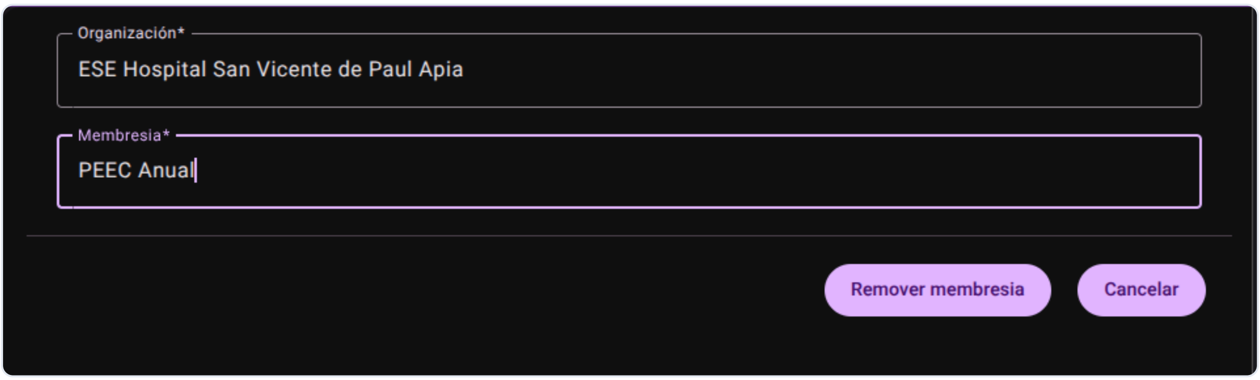
4. Click **"Apply Membership"** to grant access to the platform.

6. Remove Membership

If you want to remove access or unsubscribe from a specific organization:

1. Click the **"Remove Membership"** button.

2. Select the organization and membership plan you want to withdraw.

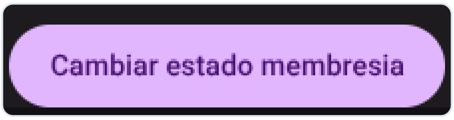


3. Press the **"Remove Membership"** button to unlink it.

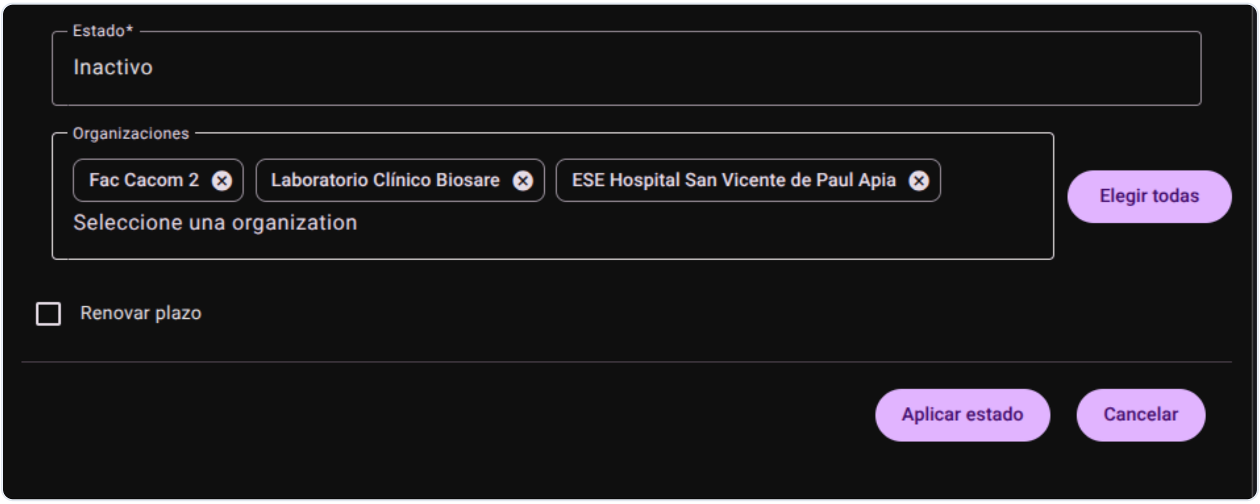
7. Change Membership Status

Enables manual subscription administrative status change for linked organizations:

1. Click **"Change membership status"**.



2. Select the new business status:
   - **Active:** Service fully enabled and functional.
   - **Inactive:** Access temporarily denied.
   - **Suspended:** Access paused due to non-payment or other administrative causes.
   - **Trial period (Free Trial):** Access enabled for a limited duration at no associated cost.
3. Select the organizations to which you want to apply this status change.



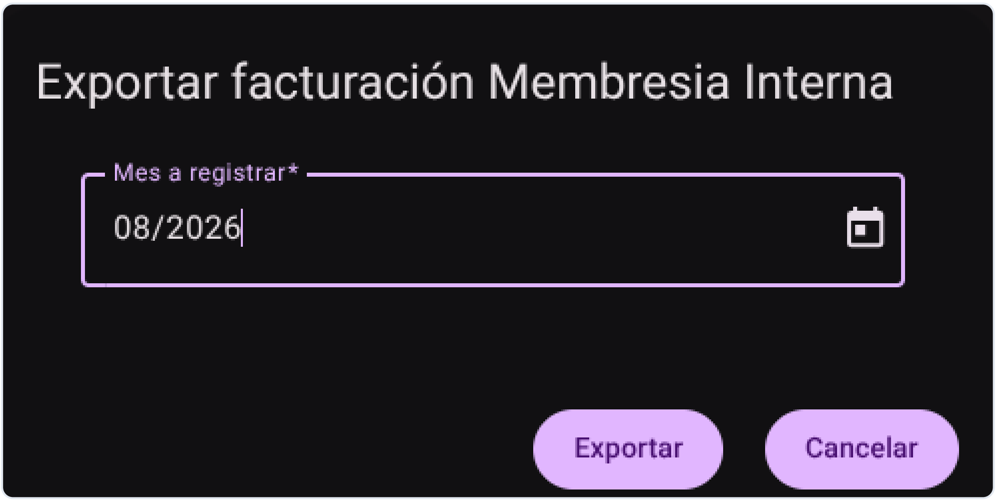
4. Press **"Apply Status"** button to apply.

8. Export Membership Billing

This function allows you to generate detailed collection reports for the accounting department:

1. Locate the plan in the table and click the **"Export Billing"** action (report/invoice icon).

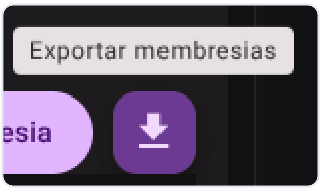
2. In the pop-up window, select the specific **Month** and **Year** of the billing you want to view.



3. Click **"Export"** to download a file in **.CSV** format with the information on amounts and collections from the organizations in that time range.

9. Export Membership List

Allows you to download the complete database of memberships configured in the system by clicking on the general download icon in the table. The system will export a **.CSV** file structured with all the information.



Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.

- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

System Menus and Navigation

Description, Purpose and Objective

> **NOTE:** The **System Menus** view is the navigation architecture console in charge of configuring, creating, editing, deleting and exporting the system menu options and navigation paths associated with each product.
>
> A **System Menu** is made up of the following key parameters:
>
> - **Name***: Visible name of the option in the side menu.
> - **Identifier***: Unique identification technical key or code.
> - **Path***: URL address or internal navigation path.
> - **Level***: Hierarchical level of the menu (Level 1 for main menu, Level 2 or 3 for submenus).
> - **Additional Fields**: Extra configuration parameters if applicable.
> - **Products***: Mandatory selection of at least one product to which this menu will be associated.
>
> The objective of this view is to allow the dynamic structuring of the navigation tree and to associate the access paths to the licensed products.

Context of Use

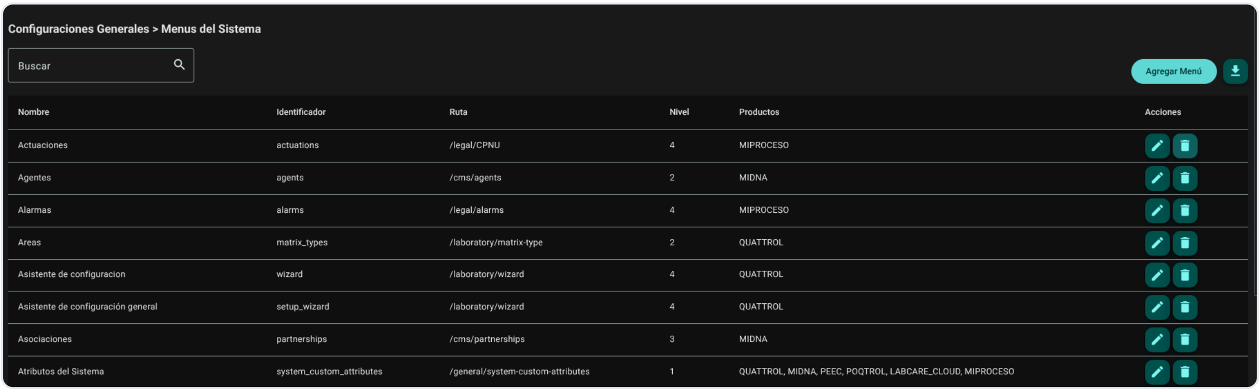
This module is used by system infrastructure administrators to:

- **Create and link navigation routes:** Create menus and associate them with authorized products.
- **Edit and structure the visual hierarchy:** Modify levels, identifiers and names of the side menu.
- **Export navigation structures:** Obtain the script file with the complete menu definition.

Possible Actions

1. Consult and Filter Menus

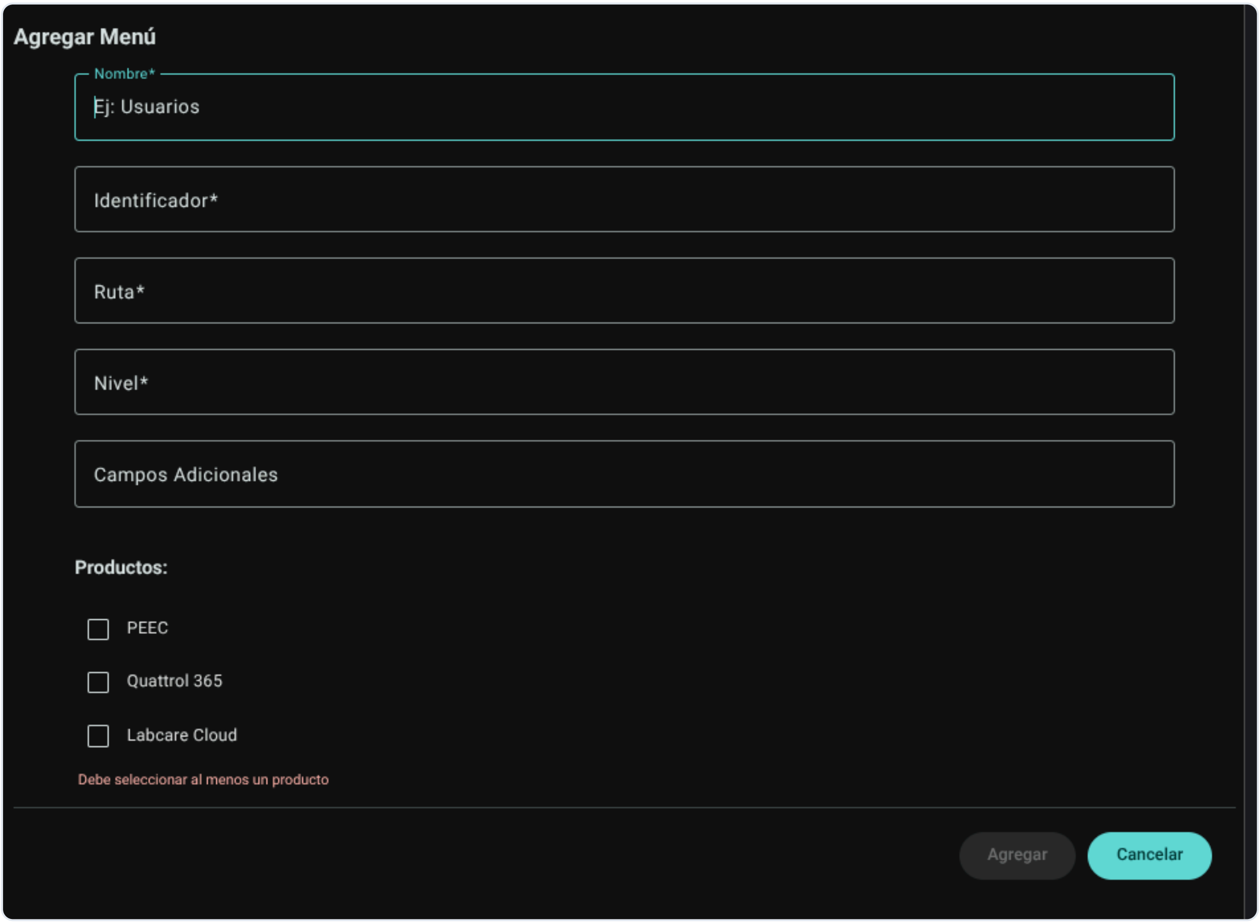
1. Enter text in the search bar (**Search**) to filter the menu list in real time.
2. Click on the column headers (**Name**, **Identifier**, **Path**, **Level**, **Products**) to change the table sorting.



2. Create a New Menu

1. Click the ****Add Menu"** button in the upper right corner.

2. In the drop-down side panel, complete the required fields:
    - **Name*** (Visible name of the option in the `Ej: Usuarios` menu).
    - **Identifier*** (Key or technical identification code `Ej: users`).
    - **Path*** (URL address or internal navigation path `Ej:/general/users`).
    - **Level*** (Hierarchical level of the menu).
    - **Additional Fields** (Extra configuration parameters, if applicable).
    - **Products*** (select the box for at least one product to which this menu will be associated). The form requires mandatory selection of at least one product before allowing registration.



3. Press the ****Add" button to register the menu (or **"Cancel"** to close the panel without keeping changes).

3. Edit an Existing Menu

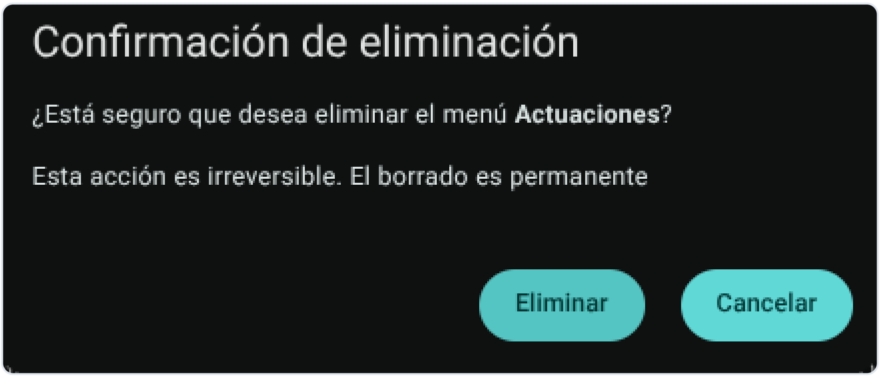
1. In the desired menu row within the main table, locate the **Actions** column and click on **pencil (**Edit**).

2. The **Edit Menu** side panel will be displayed; modify the linked information or products and save using the **"Update"** button.

4. Delete a Menu

1. In the **Actions** column of the corresponding row, click **Trash Bin (**Delete**).

2. The system will display a direct confirmation.



5. Export Menu for Script

1. Click the button **with download icon located next to **Add Menu"** in the upper right corner.

2. The system will generate and download an `.json` file with the navigation structure to integrate or execute in deployment scripts.

Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

Organization Administration

Description, Purpose and Objective

> **NOTE:** The **Organization Administration** view is the centralized module where the different legal or commercial entities registered in the system are configured and controlled.
>
> An **Organization** is the independent workspace within the platform that groups and isolates users, roles, custom configurations and product access (completely replacing the concept of *labs*).
>
> The objective of this view is to allow organized and hierarchical management of these entities, facilitating the creation of branches or dependencies and associating specific access rules and domains with them.

Context of Use

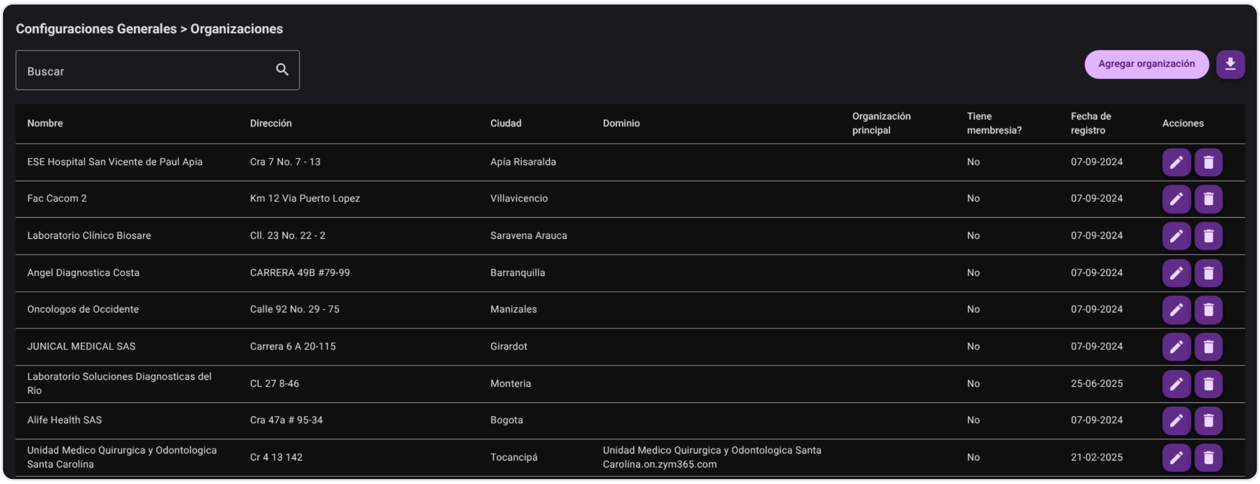
This module is for exclusive use by high-level administrative profiles (such as Product Administrators or Super Administrators). It is mainly used in the following scenarios:

- **Registration of new clients:** Registration of a new company that acquires the platform services.
- **Branch Management:** Modeling of the corporate structure through the relationship of a secondary organization with a **Parent Organization** (a higher-level entity in the system that centralizes and acts as a root node for dependencies or areas).
- **Organizational domain management:** Definition of the **Domain** (network identifier or email extension, for example `@empresa.co`) that the platform will use to verify the corporate identity of users and autolink them to the correct organization.
- **Purge records:** Removal of test or inactive organizations that no longer have contracted services.

Possible Actions

1. View and List Organizations

Allows administrators to examine the entire database of registered organizations. The records are presented in a table organized with the name, location, domain and hierarchical organization of each entity, whether or not it has membership and its joining date.

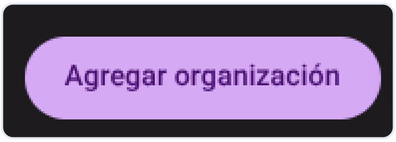


Nombre	Dirección	Ciudad	Dominio	Organización principal	Tiene membresia?	Fecha de registro	Acciones
ESE Hospital San Vicente de Paul Apia	Cra 7 No. 7 - 13	Apía Risaralda			No	07-09-2024	
Fac Cacom 2	Km 12 Via Puerto Lopez	Villavicencio			No	07-09-2024	
Laboratorio Clinico Biosare	Cll. 23 No. 22 - 2	Saravena Arauca			No	07-09-2024	
Angel Diagnostica Costa	CARRERA 49B #79-99	Barranquilla			No	07-09-2024	
Oncologos de Occidente	Calle 92 No. 29 - 75	Manizales			No	07-09-2024	
JUNICAL MEDICAL SAS	Carrera 6 A 20-115	Girardot			No	07-09-2024	
Laboratorio Soluciones Diagnosticas del Rio	CL 27 8-46	Monteria			No	25-06-2025	
Alife Health SAS	Cra 47a # 95-34	Bogota			No	07-09-2024	
Unidad Medico Quirurgica y Odontologica Santa Carolina	Cr 4 13 142	Tocancipá	Unidad Medico Quirurgica y Odontologica Santa Carolina.on.zym365.com		No	21-02-2025	

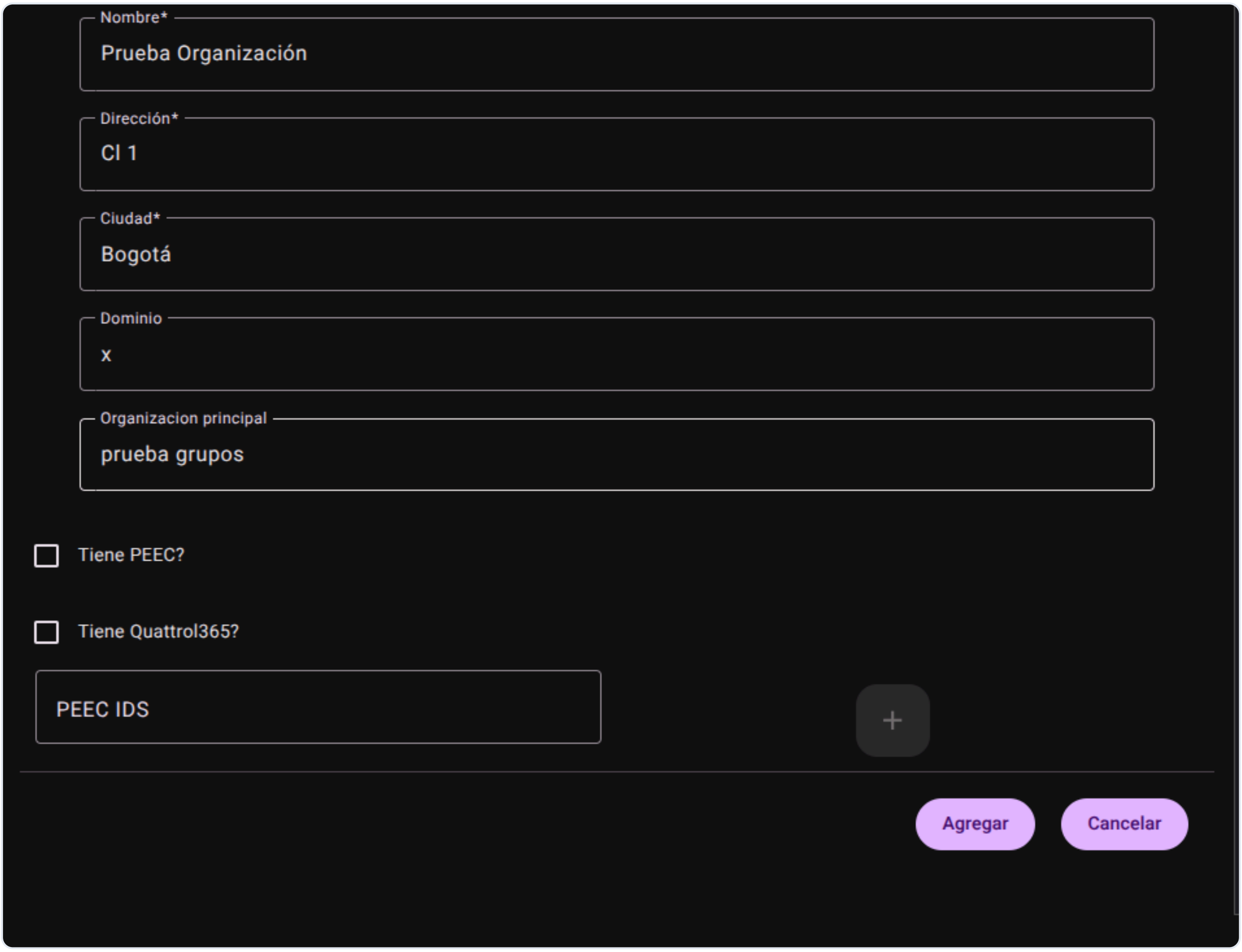
2. Add a New Organization

To add a new entity to the system:

1. Click the **"Add Organization"** button located in the upper right corner of the panel.



2. Accurately complete the following requested fields on the side form:
    - **Name:** Enter the legal or business name by which the entity will be identified in all reports and configurations.
    - **Location (Location Data):** Indicate the address, city and country of the physical headquarters for billing and location reporting purposes.
    - **Domain:** Specify the unique domain (for example, `miempresa.com`). This allows any user who signs up with an email from that domain to be automatically associated with this workspace.
    - **Parent Organization (Optional):** If the entity to be created is a division, external department or branch, select it from the drop-down list. If you are a parent or root entity, leave this field empty.

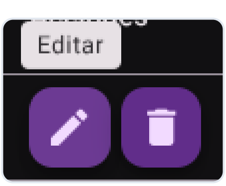


3. Press the **"Add"** button to save the record.

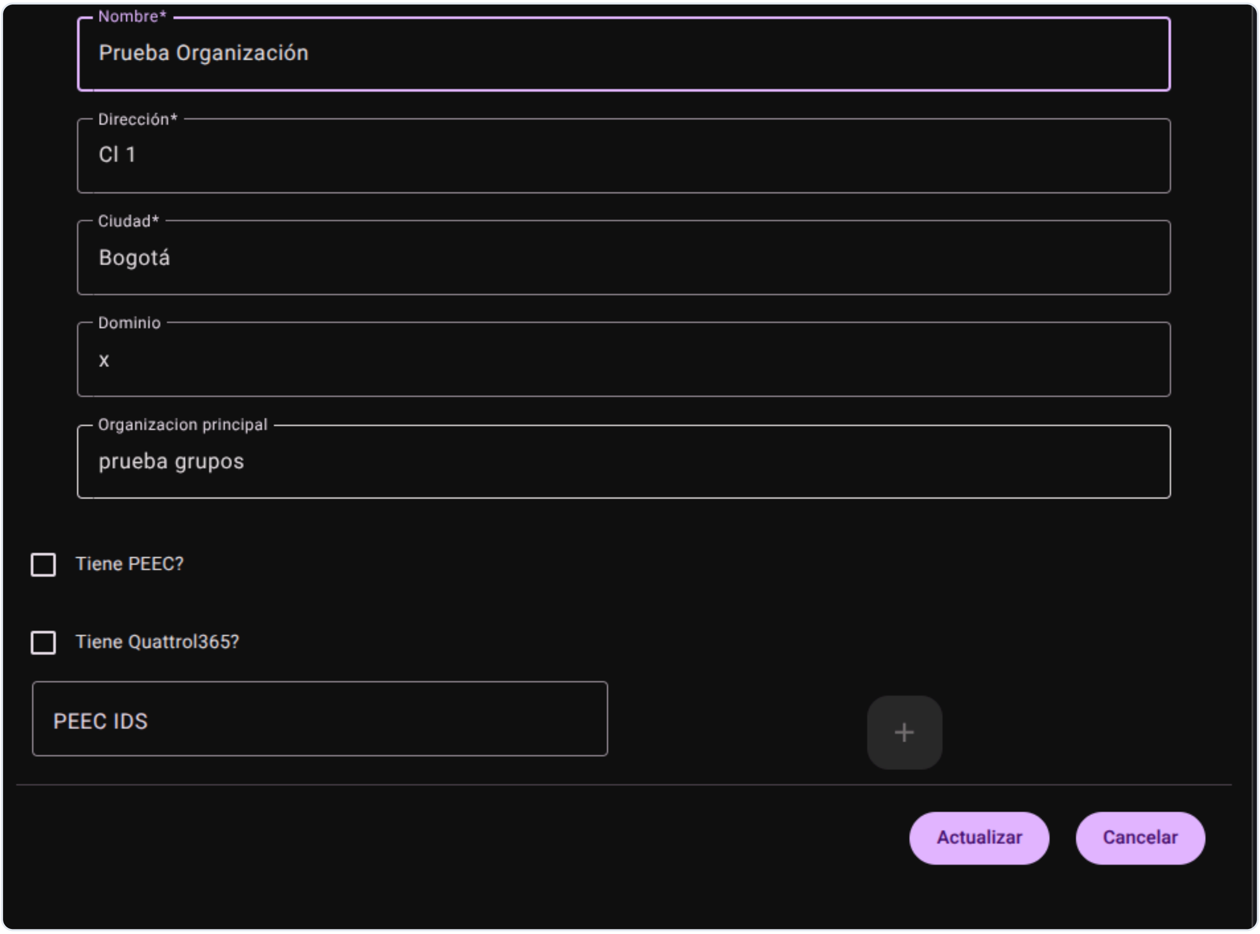
3. Edit an Organization

If you need to update pre-existing information of any entity:

1. Locate the organization in the table and click the **"Edit"** action (represented by the pencil icon ✏️).



2. The form will be pre-filled with the current information.

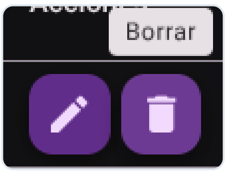


3. Make any necessary changes to the name, location, domain, or mapping of your parent hierarchical organization. There are no technical restrictions for updating these fields.
4. Click **"Update"** to apply the changes to the database.

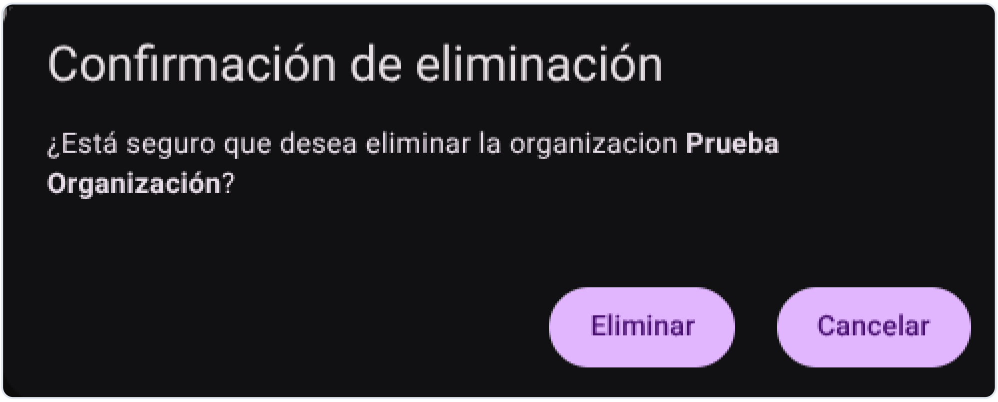
4. Delete an Organization

To permanently remove an entity from the platform:

1. Find the organization and click the **"Delete"** button (trash icon 🗑️).



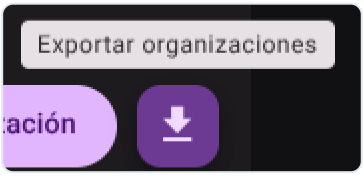
2. A confirmation modal will open warning that the action is irreversible and will affect the related data.



CAUTION: To ensure the referential integrity of the data, the system will block deletion if the organization is in use by another view or module.

5. Export Organizations

Allows administrators to generate an export file (typically in structured format) that compiles all registered organizations with their respective domains and locations for corporate audits or backups.



Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

Country and State Settings (Geographic Location)

Description, Purpose and Objective

> **NOTE:** The **Country and State Configuration** view is the module in charge of parameterizing the territorial division and geographic location of the headquarters, organizations, employees and clients within the platform.
>
> The parameterization of **Geographic Location** manages two territorial levels:
>
> - **Countries:** Name of the country and its ISO standard code (e.g. *Colombia / COL*, *Mexico / MEX*).
> - **States / Departments / Provinces:** Territorial subdivision associated with a registered country.
>
> The objective of this view is to standardize the geographical classification of entities in the database, guaranteeing the consistency of addresses in reporting and billing.

Context of Use

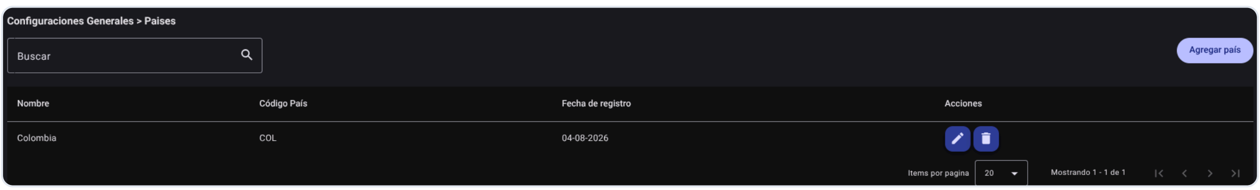
This module is used by system administrators to:

- **Open new regions:** Register countries or departments in which the organization begins operations.
- **Standardize address forms:** Ensure that location selectors in headquarters and customer records display an official geographic list.

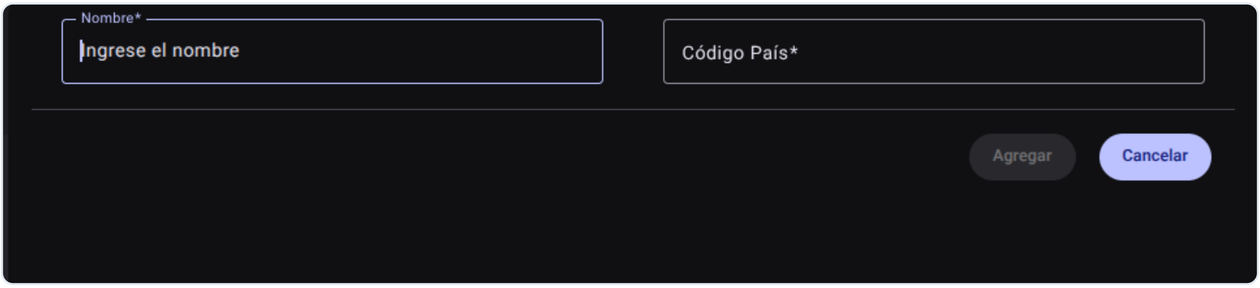
Possible Actions

1. Register and Manage Countries

1. Enter the **Countries** view (`/erp/countries`).



2. In the main table, consult the list of registered countries with their codes.
3. To register a new country, click **"Add Country"** and enter the Official Name and Code.

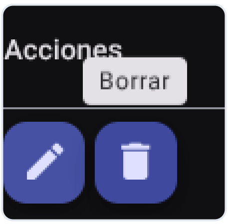


4. To add the country you must click the **Add** button

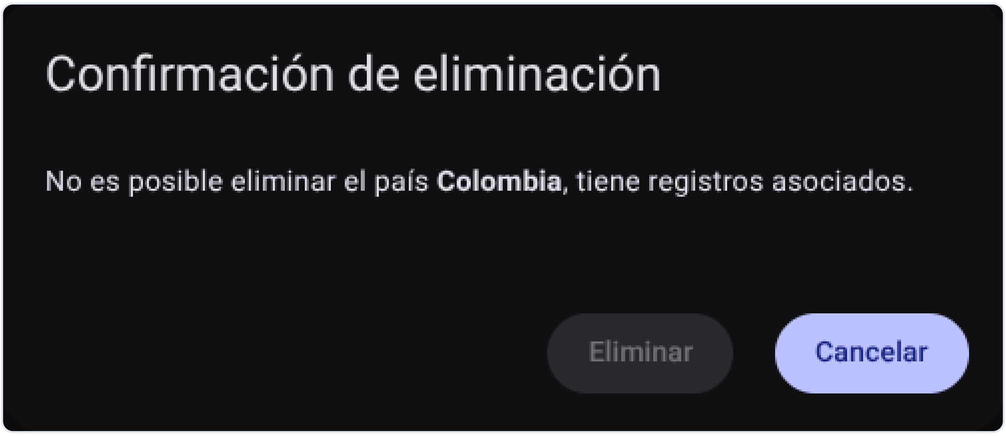
4. To modify an existing record, use the edit button (pencil icon).

5. To save, click on the **Update** button at the bottom.

6. To Delete an existing record, use the delete button (trash icon).



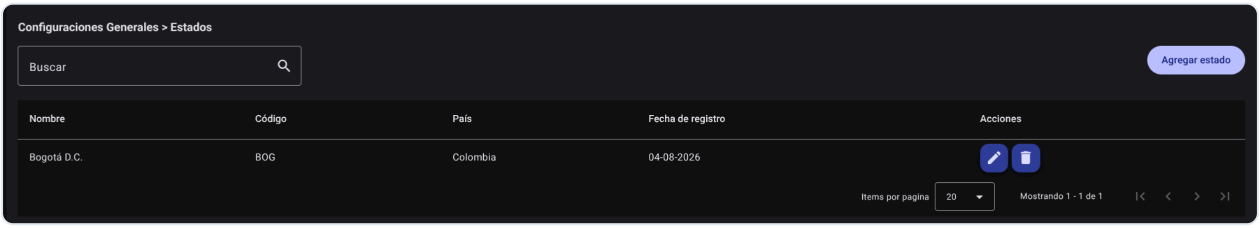
7. The system will display a direct confirmation box.



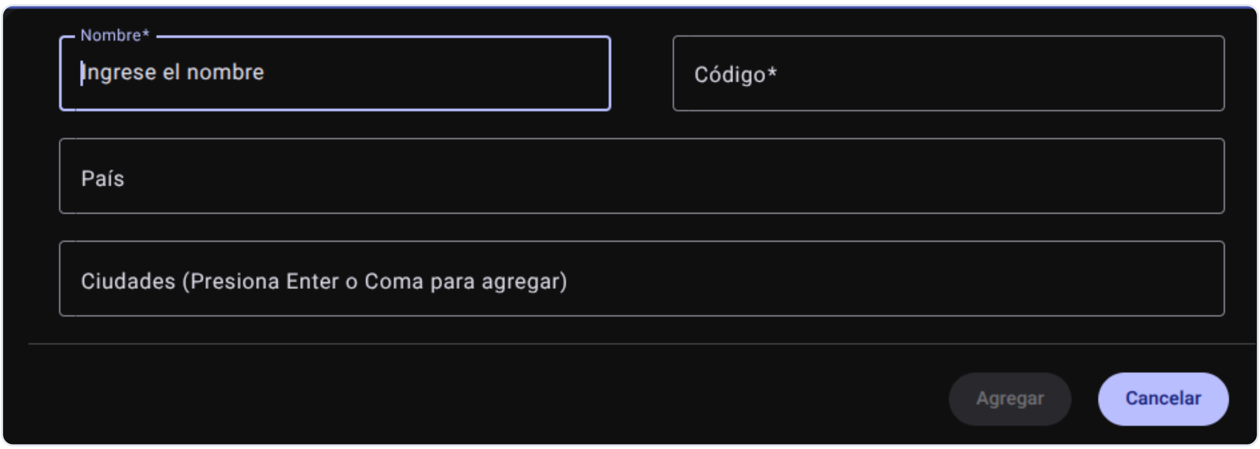
> **CAUTION:** The system blocks the deletion of any country that is being used or that has associated records.

2. Register and Manage States / Departments

1. Enter the **States** view (`/erp/states`).
2. In the main table, consult the list of **states** registered with their codes.



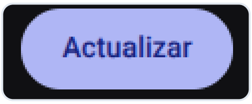
3. To register a new **state**, click on **"Add state"** and enter the Name, Official Code, Country and cities (to do this, press the Enter or Comma (,) keys to add, they will be placed in a small box and if removal is required, click the (x) in the same box.



4. To add the **state** you must click the **"Add"** button.

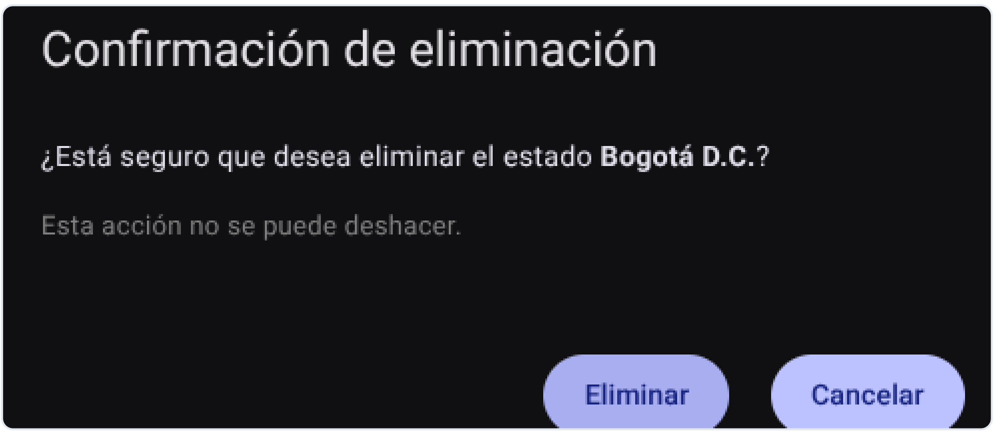
5. To modify an existing record, use the edit button (pencil icon).

6. To save your changes, click the **"Refresh"** button at the bottom.



7. To delete an existing record, use the delete button (trash icon).

8. The system will display a direct confirmation box.



Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

System Products and Licensing

Description, Purpose and Objective

> **NOTE:** The **System Products** view is the administrative console in charge of the general administration of platform products and applications, allowing you to define visual themes, file limits, downtime and support access.
>
> A **System Product** includes the following configuration parameters:
>
> - **General Data:** Product*, Product Name* and Organization.
> - **Times and Limits:** Idle time (minutes)* and General size limit (MB)* (must be greater than 5 MB).
> - **Visual Themes:** Default theme* and selection of Available Themes using the add button (**+**).
> - **Texts and Links:** Welcome message*, Logo URL, Support Link and Incident Link.
> - **View Customization:** Switches (*Show tax information in profile*, *Show all global memberships*).
>
> The objective of this view is to centralize the global operating parameters, technical limits and white label of the licensed applications.

Context of Use

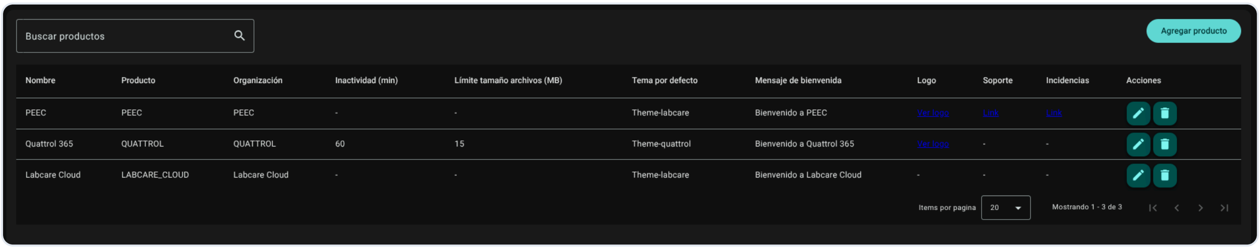
This module is used by platform administrators to:

- **Configure new products:** Define storage limits, session times and visual identities.
- **Manage topics and support access:** Customize help links and issue hyperlinks.

Possible Actions

1. Consult and Filter Products

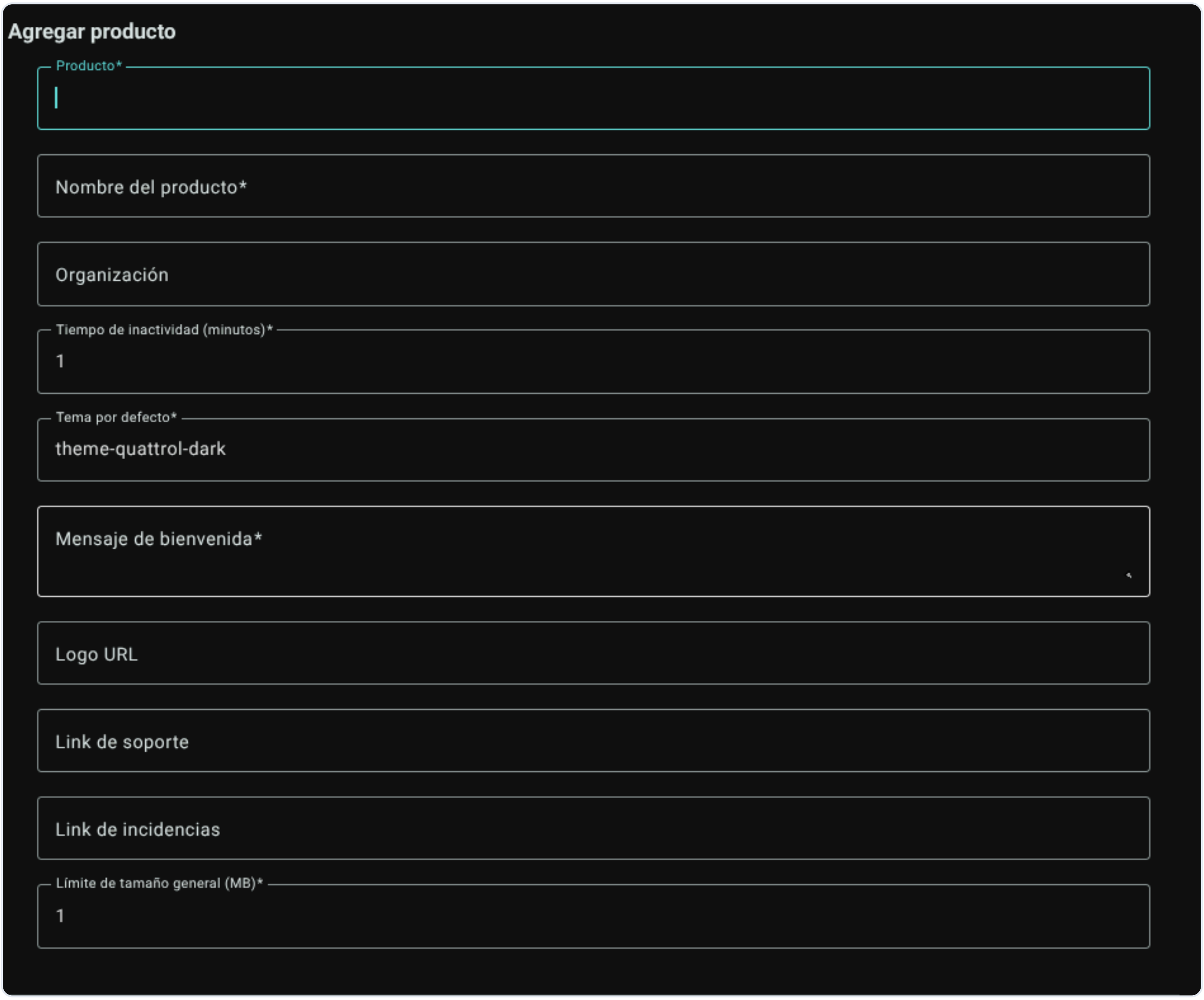
1. Enter terms in the search bar (**Search products**) to filter records in real time.
2. Click on the column headers (**Name**, **Product**, **Organization**, **Inactivity**, etc.) to sort the list in ascending or descending order.
3. The **Logo**, **Support** and **Issues** columns show shortcuts configured for each product.

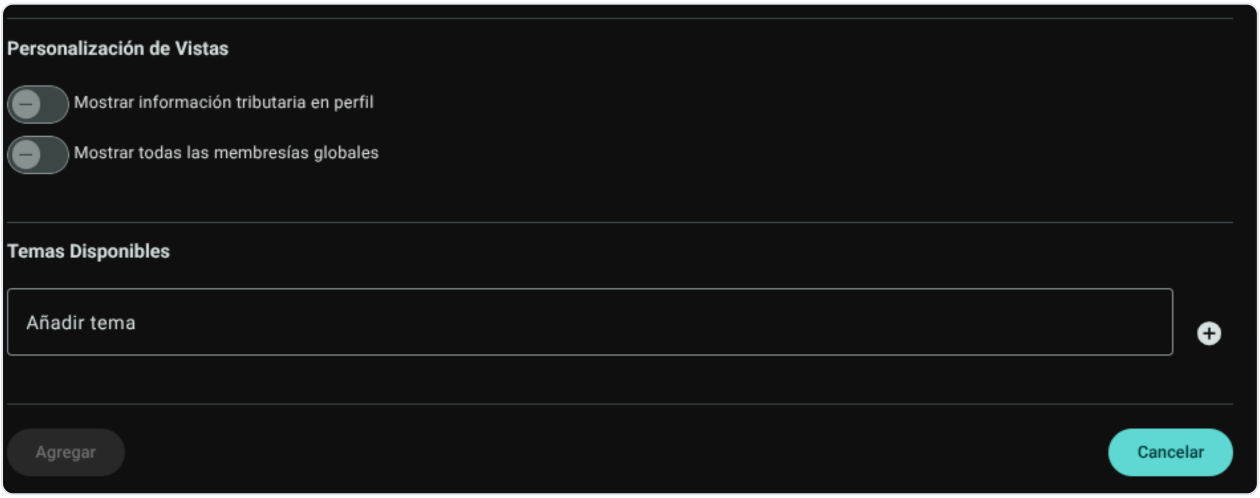


2. Create a New Product

1. Click the **Add Product** button located in the upper right corner.

2. In the side panel that appears, complete the required information:
   - **Product*** and **Product name***
   - **Organization**
   - **Downtime (minutes)***
   - **Default theme*** (select the primary visual theme from the listing).
   - **Welcome message***
   - **Logo URL**, **Support link** and **Incident link**
   - **General size limit (MB)*** (Note: must be a value greater than 5 MB; the system automatically validates this minimum).
   - **View Customization:** Turn the switches on or off (*Show tax information in profile*, *Show all global memberships*).
   - **Available Themes:** Choose a theme from the drop-down menu and press the ****+** (*Add Theme*) button to enable several alternative themes. Added topics appear as labels below the selector.

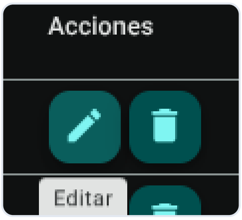




3. Click ****Add" to save the settings (or **"Cancel"** to discard them without keeping changes).

3. Edit an Existing Product

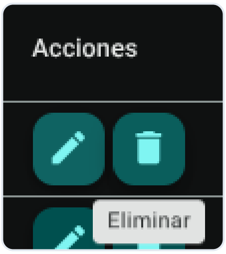
1. In the row of the desired product within the main table, locate the **Actions** column and click on **pencil (**Edit**).



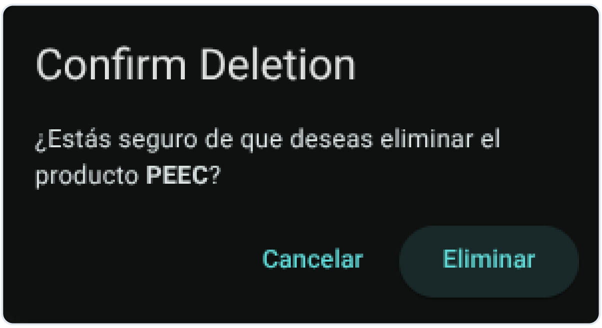
2. The panel with the loaded product information will be displayed, make the necessary adjustments and save using the **"Update"** button.

4. Delete a Product

1. In the **Actions** column of the corresponding row, click **Trash Bin (**Delete**).



2. The system will display a floating confirmation message.



Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.

- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

System References (Key-Value Parameters)

Description, Purpose and Objective

> **NOTE:** The **System References** view is the administrative console in charge of consulting, registering, editing and deleting global system references (URLs or database references) used in the general configuration.
>
> A **System Reference** consists of the following key attributes:
>
> - **Key***: Unique identifier without spaces (e.g. `API_TIMEOUT`, `STORAGE_LIMIT`).
> - **Reference type**: Parameterization mode:
> - **URL**: Enables the **Value or URL*** field to enter the web address.
> - **DB Reference**: Enables the **Document Path*** field (must be entered in the *collection/ID* format).
>
> The goal of this view is to allow dynamic updating of external service URLs and database pointers without the need for code deployments.

Context of Use

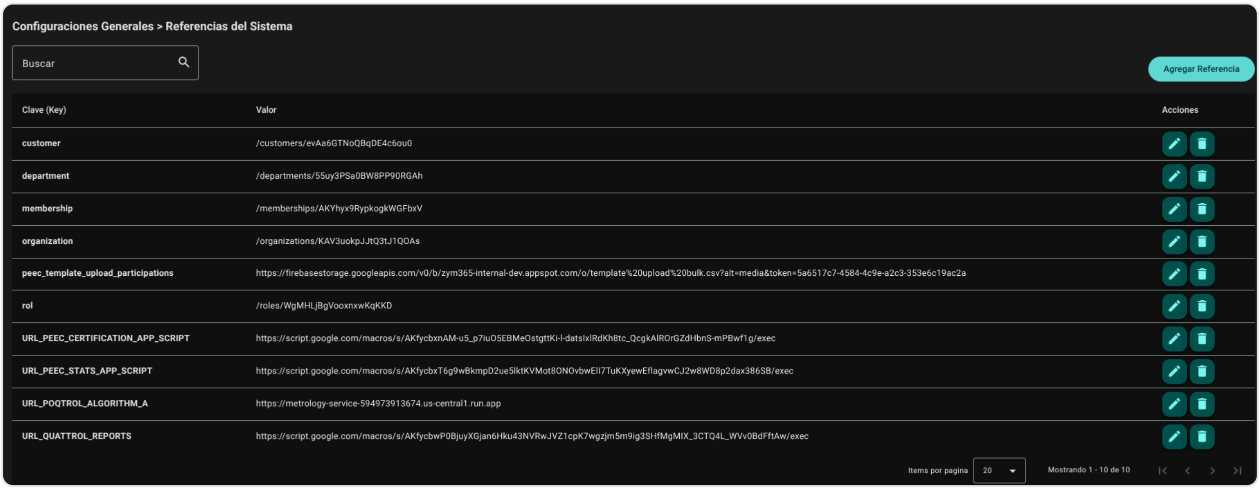
This module is managed by the architecture and infrastructure team to:

- **Adjust dynamic configurations:** Modify external service endpoints and integrations.
- **Link database references:** Store document paths with the *collection/ID* syntax.

Possible Actions

1. Consult and Filter References

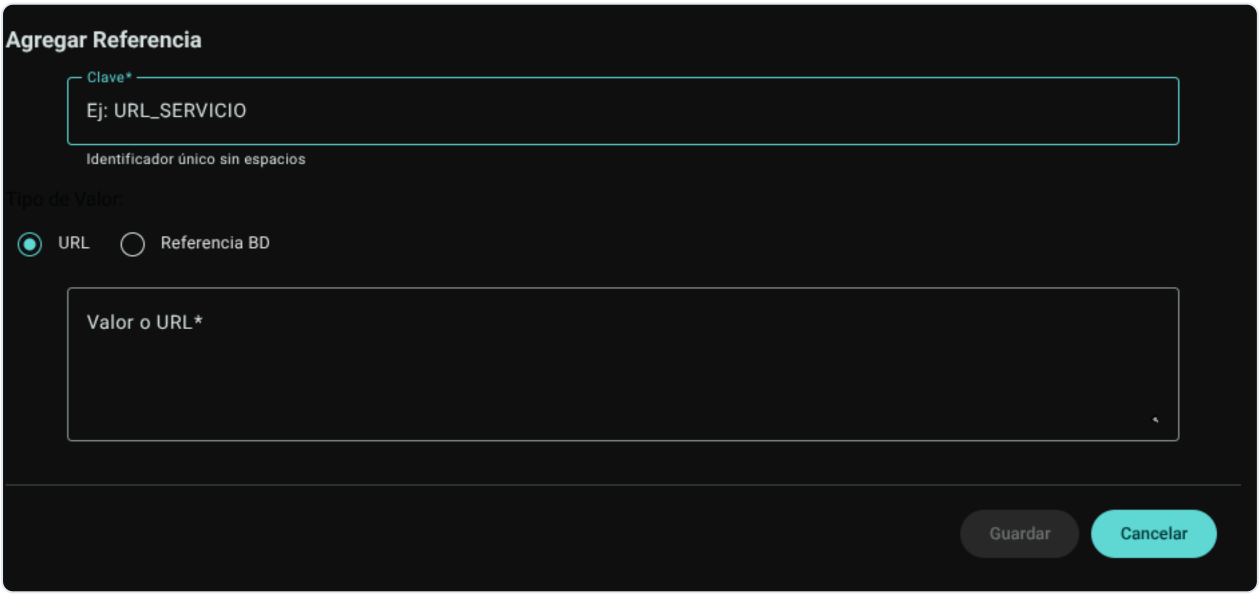
1. Use the search bar (**Search**) to locate specific keys or values in real time.
2. Click on the column headers (**Key** or **Value**) to change the sorting of the list in ascending or descending order.



2. Create a New Reference

1. Click the **Add Reference** button located in the upper right corner.

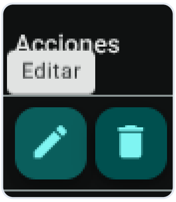
2. In the side panel that appears, complete the required fields:
   - **Key*** (enter the unique identifier without spaces).
   - **Reference type**: select the corresponding option:
     - **URL**: Enables the **Value or URL*** field to enter the link.
     - **DB Reference**: Enables the **Document Path*** field (must be entered with the *collection/ID* format).



3. Click the **Save** button to register the reference. The form will dynamically change the input field based on the selected type.

3. Edit an Existing Reference

1. In the desired reference row within the main table, locate the **Actions** column and click **pencil (**Edit**).

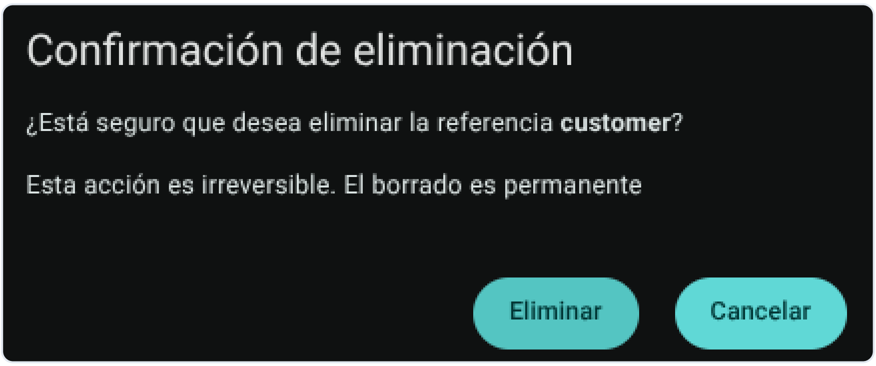


2. The **Edit Reference** panel will be displayed; Modify the key, change the mode (URL / BD) or update the route and save the changes using the **"Update"** button.

4. Delete a Reference

1. In the **Actions** column of the corresponding row, click **Trash Bin (**Delete**).

2. The system will display a direct confirmation box.



Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).

- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

Role and Permission Management

Description, Purpose and Objective

> **NOTE:** The **Roles and Permissions Management** view is the security module that allows you to define the access levels and privileges of users within the platform.
>
> A **Role** is a profile or set of authorizations assigned to a user that defines what views they can open and what operations they can perform. Privileges are controlled by **Permissions**, which are granular technical authorizations associated with specific actions (such as reading, creating, updating, deleting, or exporting information).
>
> The objective of this view is to ensure data security and privacy, limiting user access exclusively to your organization's tools and data that are strictly necessary for its functions.

Context of Use

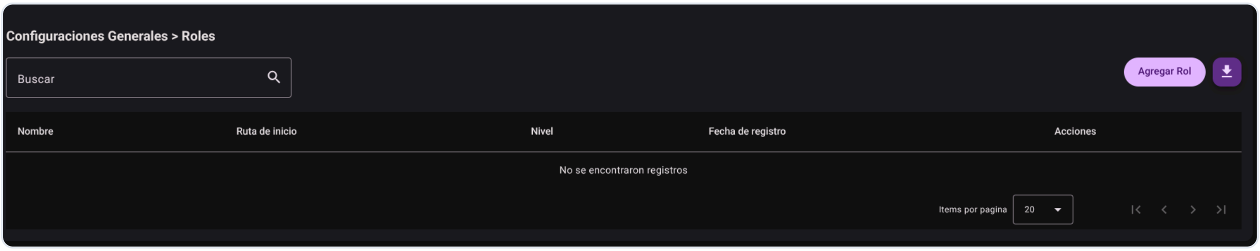
This module is used critically by Platform Administrators to:

- Configure user profiles according to the organizational structure of the company (for example: Administrator, Lawyer, Judicial Clerk, Technical Quality Manager, Auditor or Patient).
- Define the **Initial Route** (the default view to which the user is redirected immediately after successfully logging into the system).
- Configure access and editing permissions for each functional menu enabled in the organization.
- Retire or delete roles that are no longer valid or deprecated, as long as they are not assigned to active users.

Possible Actions

1. View and List Roles

Shows the list of roles configured in the system with their essential data: the name of the role, its initial assigned path, the level and the entry date.

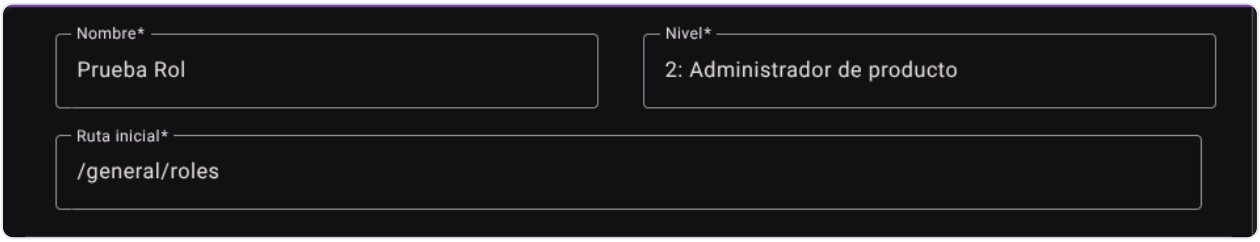


2. Add a New Role

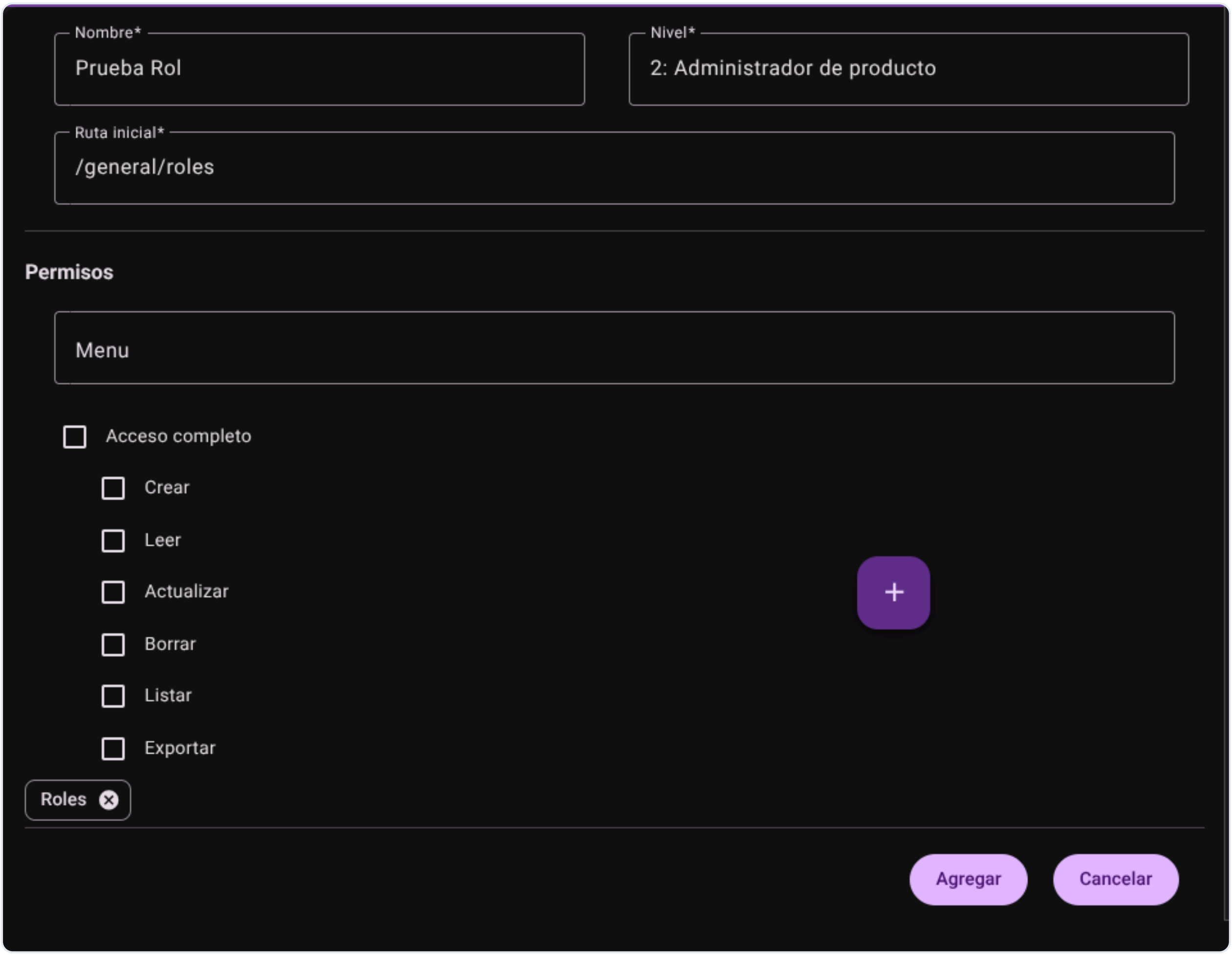
To create and configure a role in the system:

1. Click the **"Add Role"** button in the upper right corner of the screen.

2. Fill out the basic fields of the form:
   - **Name:** Enter the friendly name of the role (e.g. `Auditor Interno`).
   - **Level:** Enter the desired level of the role. (ex. `2. Administrador del produto`)
   - **Initial Path:** Enter the system path that the user will access by default (e.g. `/general/roles`).



3. Configure the **Permissions per Menu** matrix by clicking the **Add Menu** button (`+`):
   - Select the functional **Menu** you want to grant access to.
   - Check the boxes for the required granular permissions:
     - **Full Access:** Grants all available permissions for the selected menu.
     - **Create:** Authorizes the registration of new information.
     - **Read:** Enables display of log details.
     - **Update:** Allows you to modify or edit existing data.
     - **Delete:** Allows permanent deletion of records.
     - **List:** Enables the display of general data tables.
     - **Export:** Enables the option to download reports and data to external files.

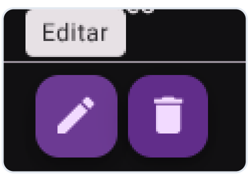


4. Click **"Add"** to save the role.

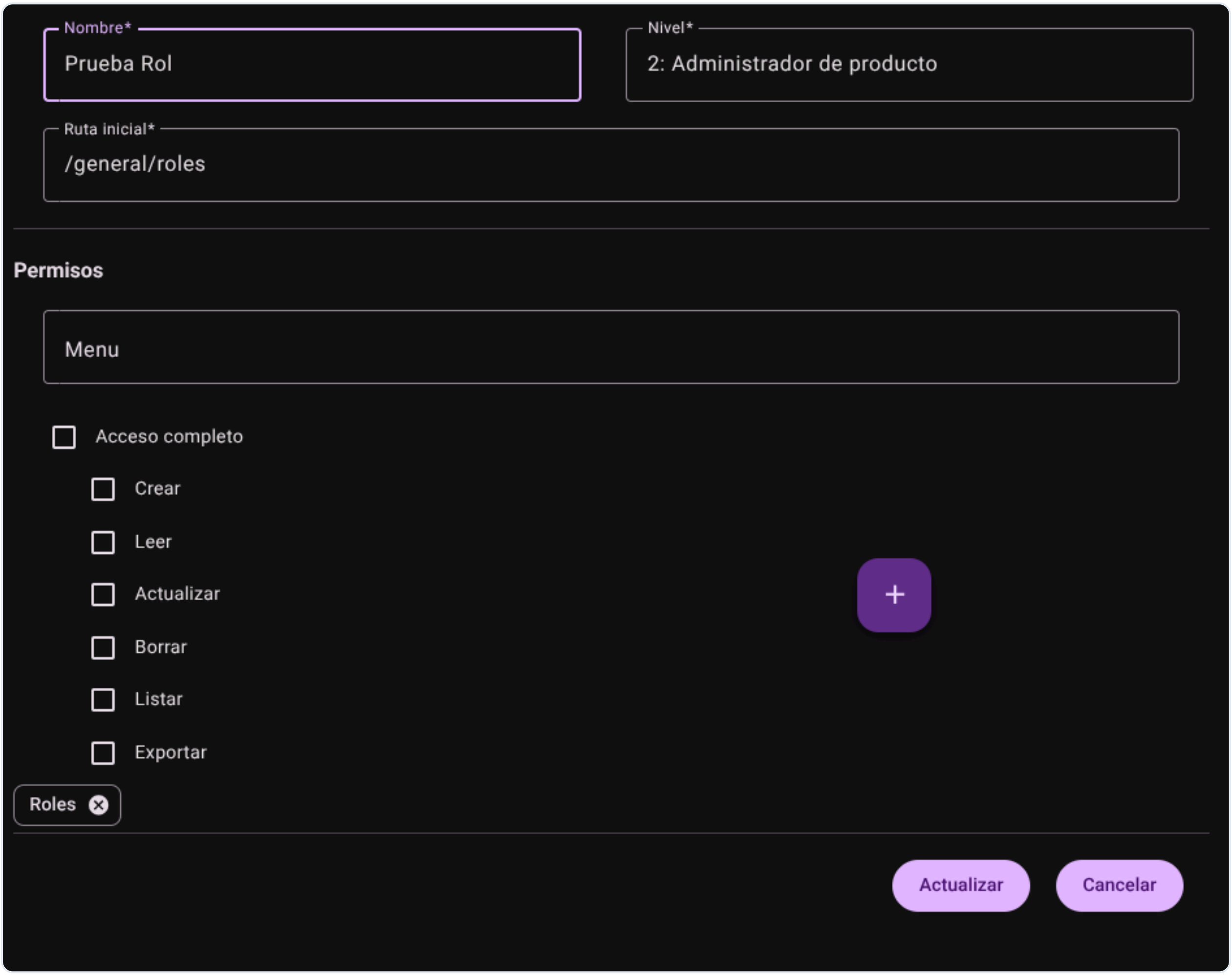
3. Edit a Role

To modify the privileges or settings of a role:

1. Locate the role in the list and click **"Edit"** (pencil icon ✏️).



2. Modify the initial path or add/remove specific menus and permissions from the access array. There are no restrictions on changing the permissions assigned to a role.

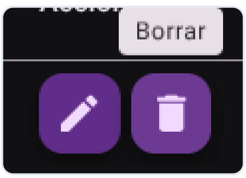


3. Click **"Update"** to apply the changes immediately.

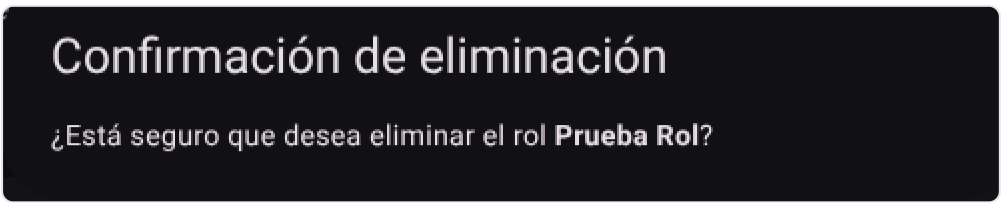
4. Delete a Role

To permanently delete a profile from the system:

1. Find the role and click the **"Delete"** action (trash icon 🗑️).



2. Confirm the action in the confirmation popup modal.



> **CAUTION:** The system preventively blocks the deletion of any role that is being used by an active user in an organization.

Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).
- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

User Administration

Description, Purpose and Objective

> **NOTE:** The **User Administration** view is the section of the platform that allows you to control the access of staff and collaborators to the system, managing their credentials, personal data and security profiles.
>
> A **User** is any account with active credentials that logs into the system under a given role. The platform classifies accounts into three main types: **Internal User** (direct collaborator who has a supervisor and assigned office), **External User** (staff or indirect client) and **Patient User** (final recipient of health services with clinical metrics such as weight and height).
>
> The objective of this module is to centralize account management, guaranteeing that each person is correctly identified and has only the access that corresponds to them.

Context of Use

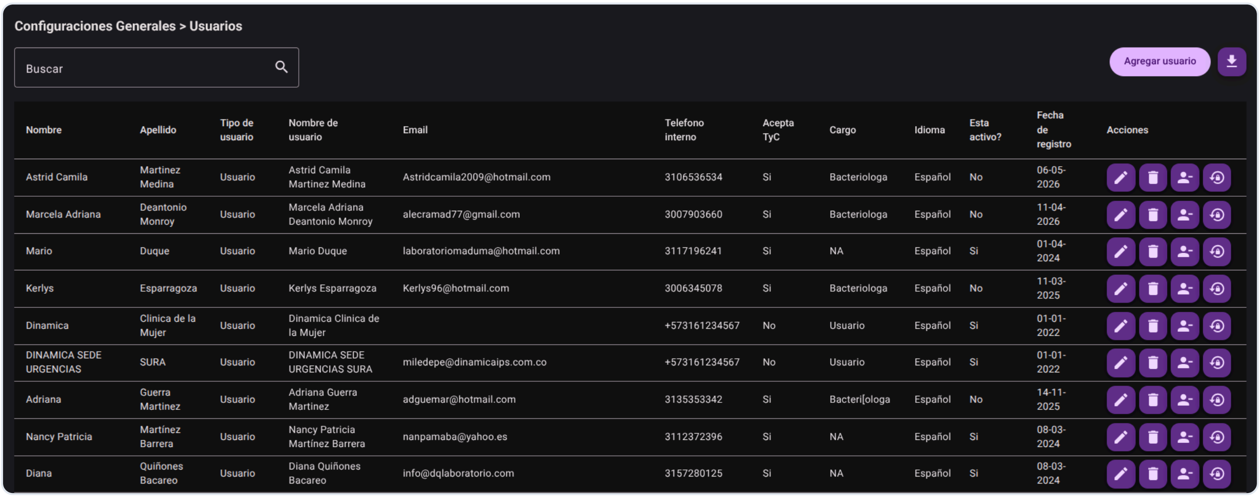
This module is used by organization Administrators to:

- **Register new collaborators:** Register employees (internal users) with their respective contractual information and supervision.
- **Create accounts for clients or contractors:** Enable external users.
- **Register patients:** Register health users (patients) linked to service providers.
- **Credential support:** Change forgotten passwords or temporarily suspend access (deactivate) accounts for security or job separation reasons.

Possible Actions

1. View and List Users

Displays a table with all the users registered for the organization, detailing their name, email, role, user type (internal, external or patient) and activity status.



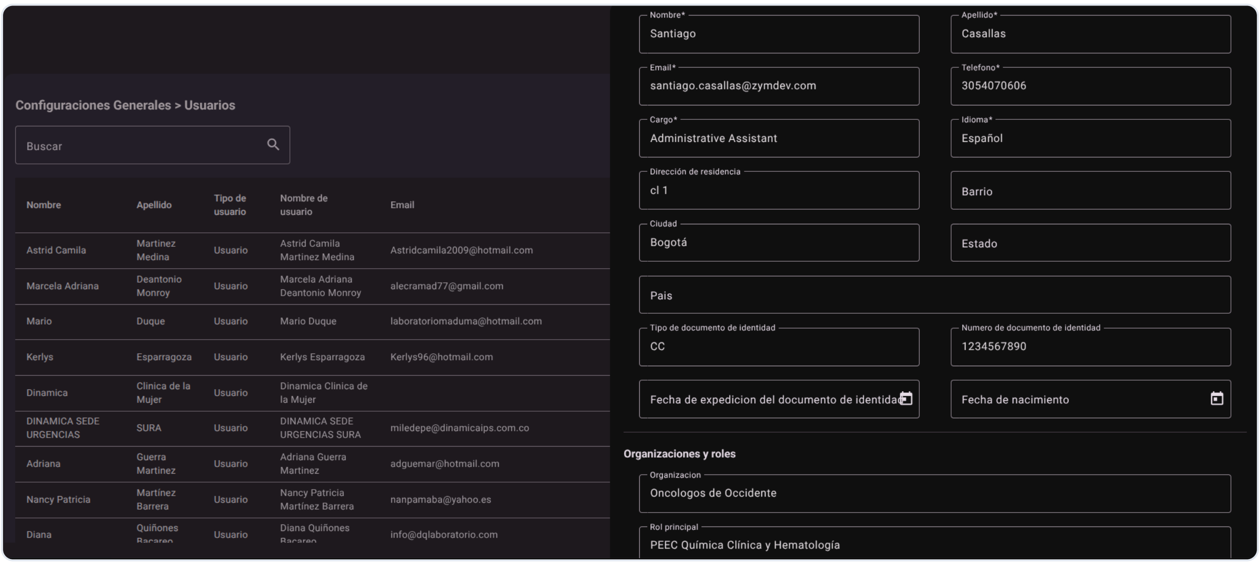
2. Add a New User

To create an account, click the add button corresponding to the required user type:

Add User

1. Click **"Add User"**.

2. Fill out the form with the basic information:
   - **Personal Information:** Name, surname, email, telephone, address, neighborhood, city, country and preferred language.
   - **Identification:** Type, number and date of issue of the document, and date of birth.
   - **Security:** Status, position and assignment of the corresponding **Role**.



3. Click **"Add"** to create the account.

Add Internal User

1. Click **"Add internal user"**.
2. Complete the form information (includes the same external user data plus organization-specific fields):
   - **Corporate Structure:** Assigned office, direct supervisor and department to which it belongs.
   - **Travel Documentation:** Passport and date of issue of the passport.
3. Click **"Save"** to create the record.

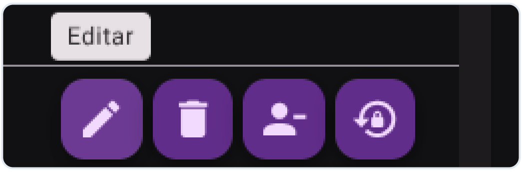
Add Patient

1. Click **"Add Patient"**.
2. Complete the form with the specific clinical and identification fields:
   - **Clinical Data:** Weight (in kilograms), height (in centimeters) and profession of the patient.
   - **Service:** Associated health service provider and corresponding role on the platform.
3. Click **"Save"** to confirm.

3. Edit a User

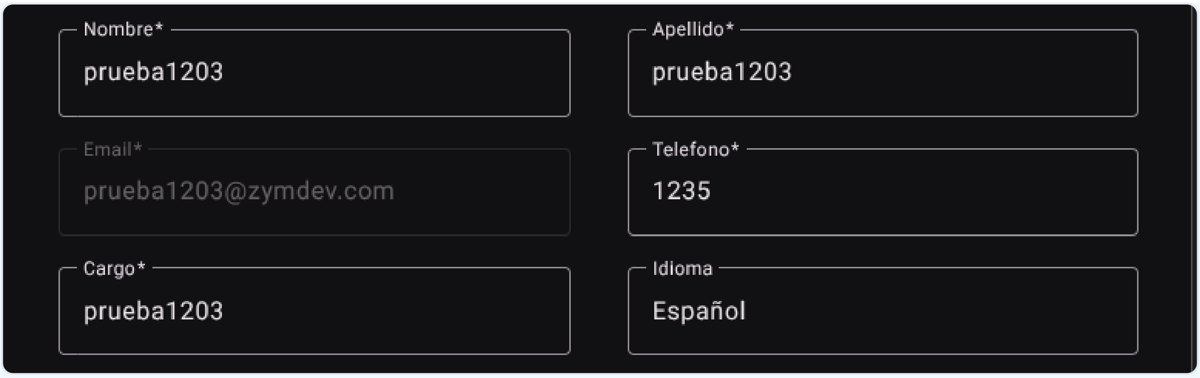
To modify the contact or work information of a registered user:

1. Locate the user in the table and click **"Edit"** (pencil icon ✏️).



2. The form will load with the current information. Make any necessary changes to the address, title, phone number or role.
3. Click **"Update"** to save.

> **WARNING:** For security and login integrity (authentication) reasons, the email address cannot be modified once the account has been created.

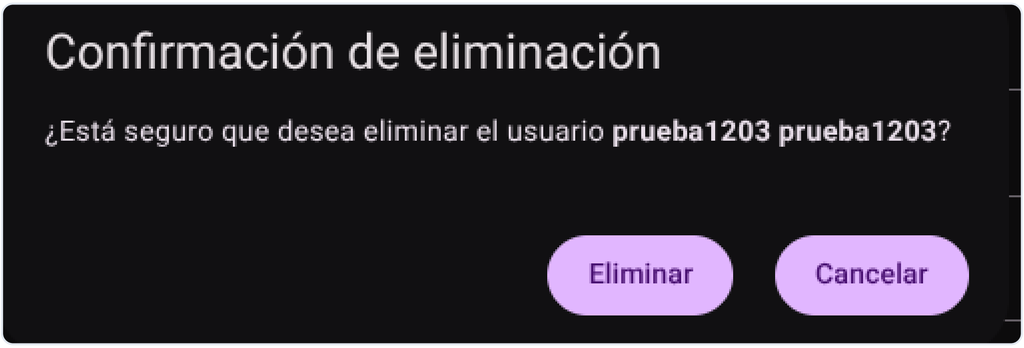


4. Delete a User

To permanently delete a user account:

1. Locate the record and click **"Delete"** (trash icon 🗑️).

2. confirm the action in the confirmation modal.

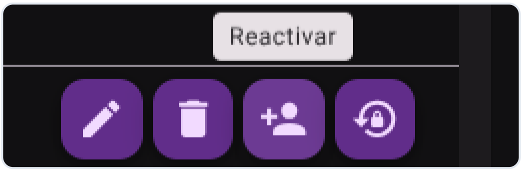


CAUTION: Deleting a user is permanent and will erase their direct connection with the organization. If the user has associated historical records (such as process uploads or results entries), it is recommended to change their status to **Inactive** instead of deleting the account to preserve data traceability.

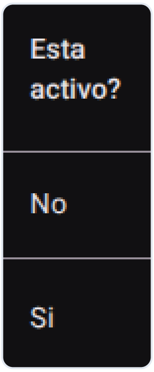
5. Activate or Deactivate User

Allows you to quickly suspend or restore access to the platform without having to delete the user's historical data:

1. Click the status switch or icon in the corresponding user's row.



2. The system will toggle the **Are You Active?** between **Yes** (access allowed) **No** (access temporarily denied).

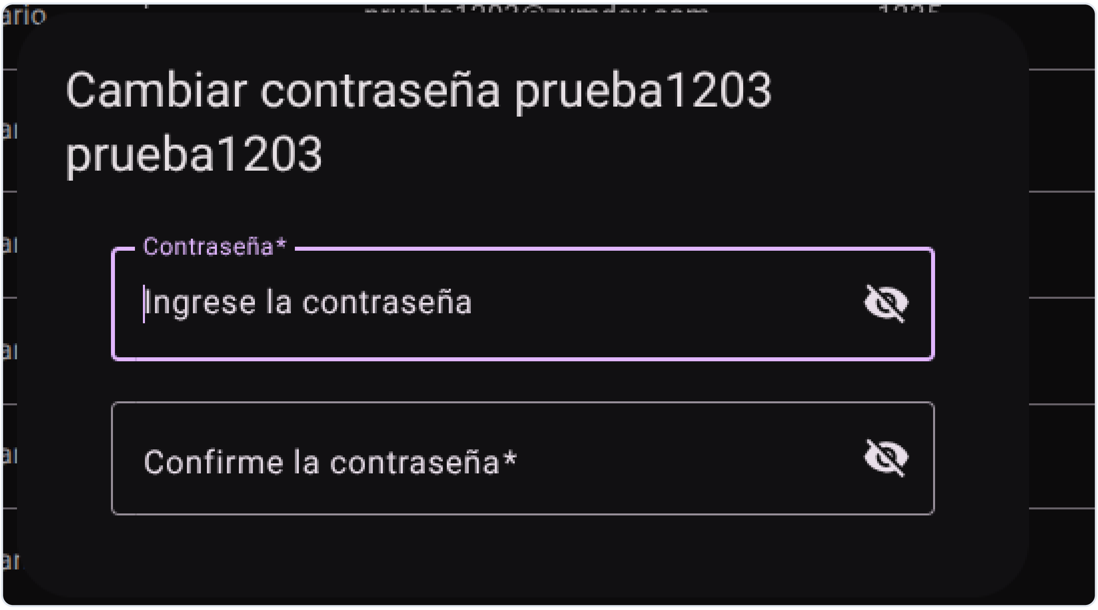


6. Change Password from the Administrator

Allows you to safely redefine the password of a user who has forgotten their access credentials:

1. Click the key icon or **"Change Password"** in the actions column.

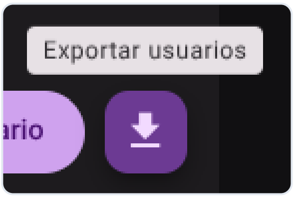
2. In the pop-up form, enter the new password and confirm it in the corresponding verification field.



3. Click **"Change Password"** to save.

7. Export User List

To download the organization's user database, click the download icon in the upper right corner. A file in **.CSV** format will automatically download with the account information.



8. Search User

To search for any user by name or other character, type the first name, last name, username, email, phone number, etc., in the search bar

Roles and Permissions Required

Access to these global system parameters is restricted to the **General Administrator** or **Platform Support** role. Requires the following permissions:

- **Geographic and UI parameters:** `country_read`, `state_read`, `languages_read` and `menus_read`.
- **Entities and Licensing:** `memberships_read`, `system_products_read` and `config_refs_read`.
- **Traceability:** `tags_read` and `incident_tracking_read` (for incident tracking).

- **Write Actions:** Permissions with corresponding `_create` and `_update` suffixes to modify system tables.

Collaborator Contract Management

Description, Purpose and Objective

> **NOTE:** The **Management of Collaborator Contracts** (or User Contracts) view is the ERP module intended for the registration, salary control and hourly pricing of personnel linked commercially or professionally with the organization.
>
> A **Collaborator Contract** is the digital record that defines the contractual and remuneration conditions of an internal or external user. Each record details the **Type of Contract** (e.g. Indefinite Term, Provision of Services), the **base Salary**, the **Currency**, the **Cost per Hour** (rate used to value the time recorded in the projects), the **Cost per Overtime Hour**, the temporary validity (*Start Date* and *End Date*) and the reservation of **Vacation Days per Year**.
>
> The objective of this view is to centralize the cost information of the company's human talent, serving as a direct basis for the automatic calculation of project costs, billing for hours worked and periodic payroll settlement.

Context of Use

This module is used by the Human Resources, accounting and financial management team to:

- **Register new relationships:** Formalize the salary and cost conditions of a new employee or contractor.
- **Assign operational costs per hour:** Define the standard hourly rate of each collaborator to calculate the real profitability of the projects in which they report hours.
- **Manage renewals and extensions:** Mark contracts as **Extension** and define new end dates and salary adjustments.
- **Monitor the validity of personnel:** Consult in a unified way which contracts are active or about to expire.

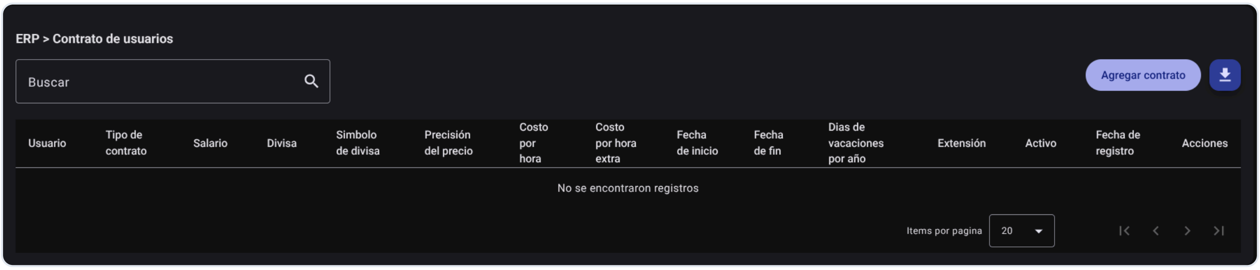
Possible Actions

1. Consult and Search Personnel Contracts

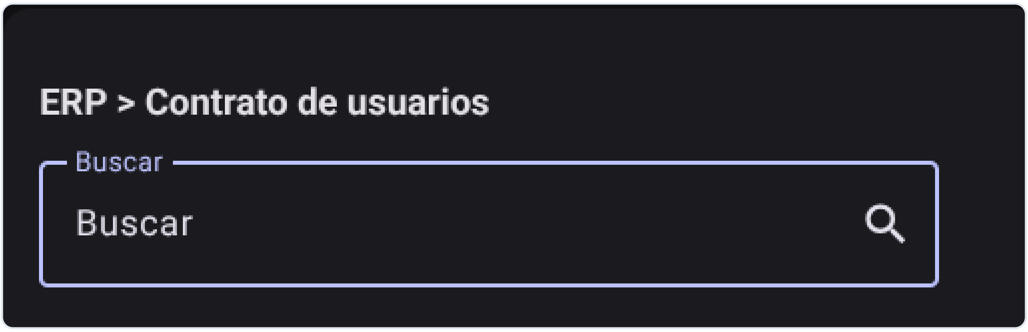
It presents a general table with the list of contracts of the organization, showing:

- **User:** Full name of the collaborator.

- **Type of contract:** Type of legal binding.
- **Salary and Monetary Information:** Amount, payment currency and decimal precision of prices.
- **Operating Costs:** Cost per standard hour and cost per overtime hour.
- **Validity:** Start date, end date and activity status (**Active?**).
- **Vacation:** Cumulative annual rest days.
- **Extension:** If it is a contractual renewal.



Use the search engine above to filter by the name of the collaborator or type of contract.



2. Add a New Contract

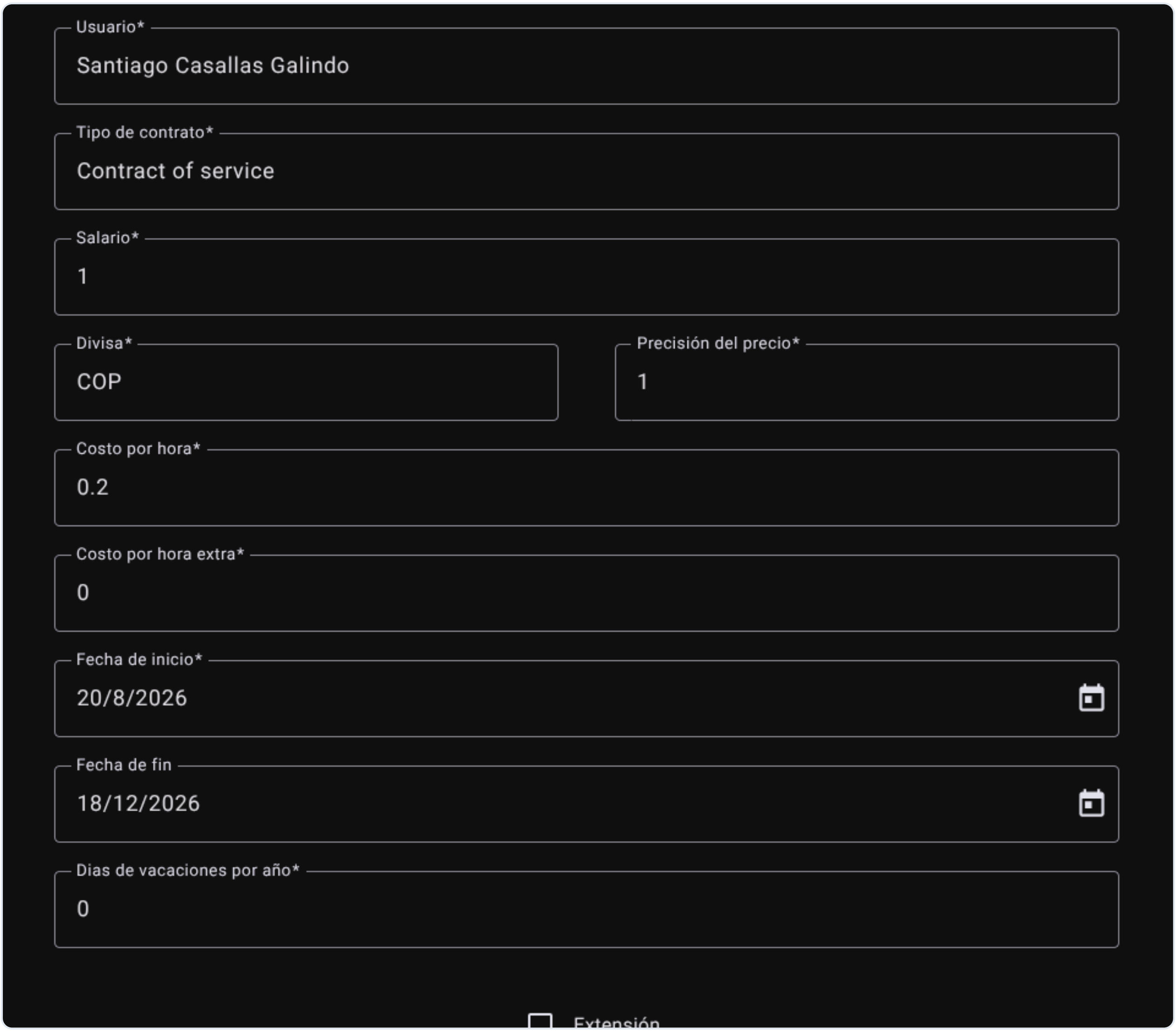
To register a contractual agreement:

1. Click the **"Add Contract"** button in the upper right corner.

2. Fill out the lateral form with the contract parameters:
    - **User:** Search and select the collaborator from the autocomplete list of users in the organization.
    - **Contract Type:** Select the agreement type from the auto-complete list.
    - **Salary:** Enter the monthly base compensation amount.
    - **Currency:** Select the payment currency from the list of enabled currencies.
    - **Price Precision:** Specify the number of decimal places for payroll calculations.
    - **Cost per hour:** Enter the standard hourly rate for project costing.
    - **Cost per overtime hour:** Enter the value of the overtime rate.
    - **Start Date:** Select the contract start date using the interactive calendar.

- **End Date:** Enter the end date of the agreement (mandatory for fixed-term contracts, optional for open-ended).
- **Vacation days per year:** Enter the number of paid days off to which you are entitled annually.

- **Extension:** Check this checkbox if the contract corresponds to an annex or extension of a previous contract.

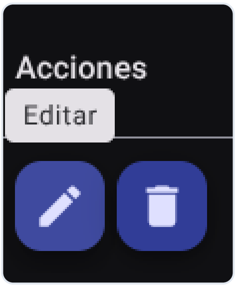


3. Click **"Add"** to save.

3. Edit a Contract

To record a salary increase, change hourly rates, or extend the end date:

1. Locate the collaborator contract and click **"Edit"** (pencil icon ✏️).



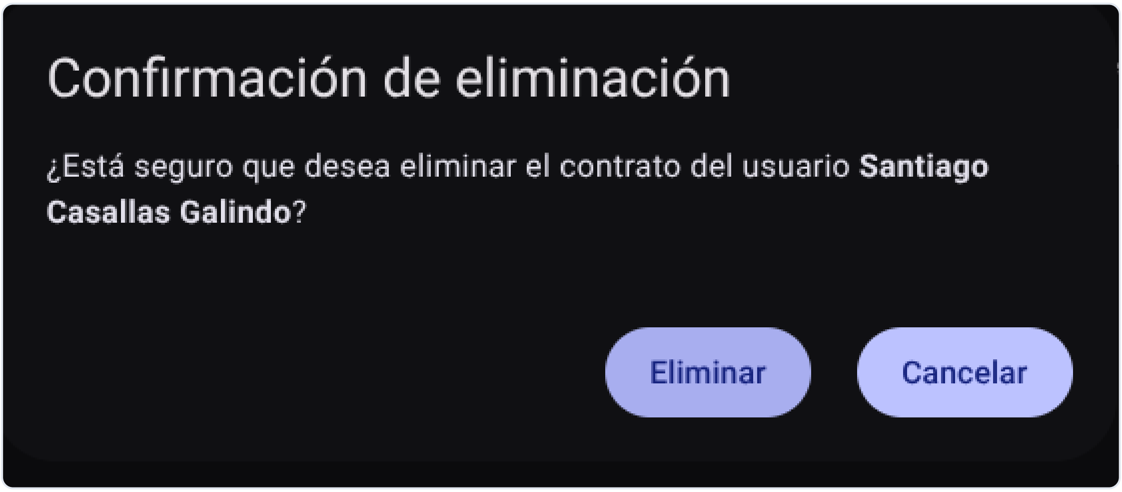
2. Make the appropriate changes to the side form and press **"Update"** to apply the accounting changes immediately.

4. Delete a Contract

To permanently delete a contract token:

1. Click the trash icon ( ) for the corresponding contract.

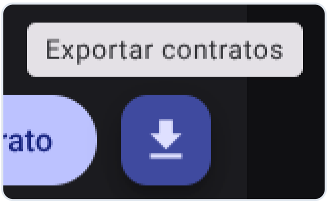
2. Confirm the action in the pop-up box.



> **CAUTION:** The deletion of a contract is irreversible. The system will prevent the deletion if there are approved hour records or paid payrolls associated with the validity of the contract, to avoid inconsistencies in the accounting and historical billing reports.

5. Export Contract Report

Click the download button at the top right of the table to export the current and historical contracts database to a spreadsheet file in **.CSV** format.



Required Technical Permits

The control of contractual and salary information is regulated by the following privileges:

- `user_contracts_read`: Allows access to the view, visualization of the general table and consultation of basic salaries.
- `user_contracts_create`: Enables the action of adding new contracts and setting hourly rates.
- `user_contracts_update`: Authorizes the modification of salaries, extensions of dates and redefinition of costs per hour.
- `user_contracts_delete`: Allows you to delete contractual records from the database (restricted by financial integrity).
- `user_contracts_export`: Enables downloading the list in `.CSV` format.

Devices and Hardware

Description, Purpose and Objective

> **NOTE:** The **Device Inventory** view (or Hardware Management) is the ERP module responsible for the control, appraisal and assignment of technological assets (computers, peripherals, servers and licenses) owned by the organization.
>
> A **Device** is any physical hardware asset or technological resource recorded in inventory. Each device has a technical sheet that includes the legal **Owner** of the asset, its **Cost Center** (6-digit accounting code), financial values (purchase value, commercial value and current net value with its respective currency), and the current **Responsible** (collaborator or department that is assigned the custody and use of the equipment).
>
> The objective of this view is to ensure control of the life cycle of hardware assets, from their accounting acquisition and assignment of responsibility for use, to their depreciation and definitive removal from inventory.

Context of Use

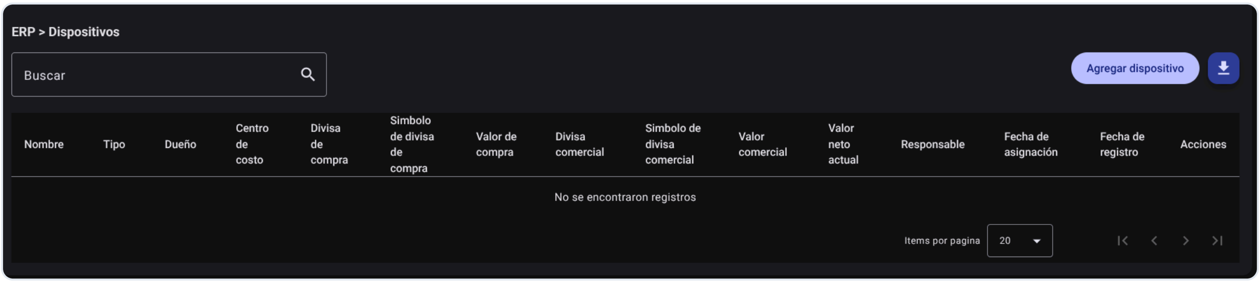
This module is operated mainly by the Technology (IT) and accounting area to:

- **Record new purchases:** Enter computers or peripherals purchased, detailing their purchase cost and cost center.
- **Assign work tools:** Formally link a computer or device to a collaborator when he or she joins the company or changes position.
- **Control depreciation:** Consult the commercial value and current net value (depreciated) of the equipment.
- **Audit and traceability:** Consult the assignment history of a piece of equipment to identify who has had it in their custody over time.

Possible Actions

1. Consult and Search Devices

Displays the total inventory in an interactive table with details of name, type, owner, cost center, purchase/trade values, assigned manager and assignment date. The upper search engine allows you to filter devices by name, brand, person responsible or code.

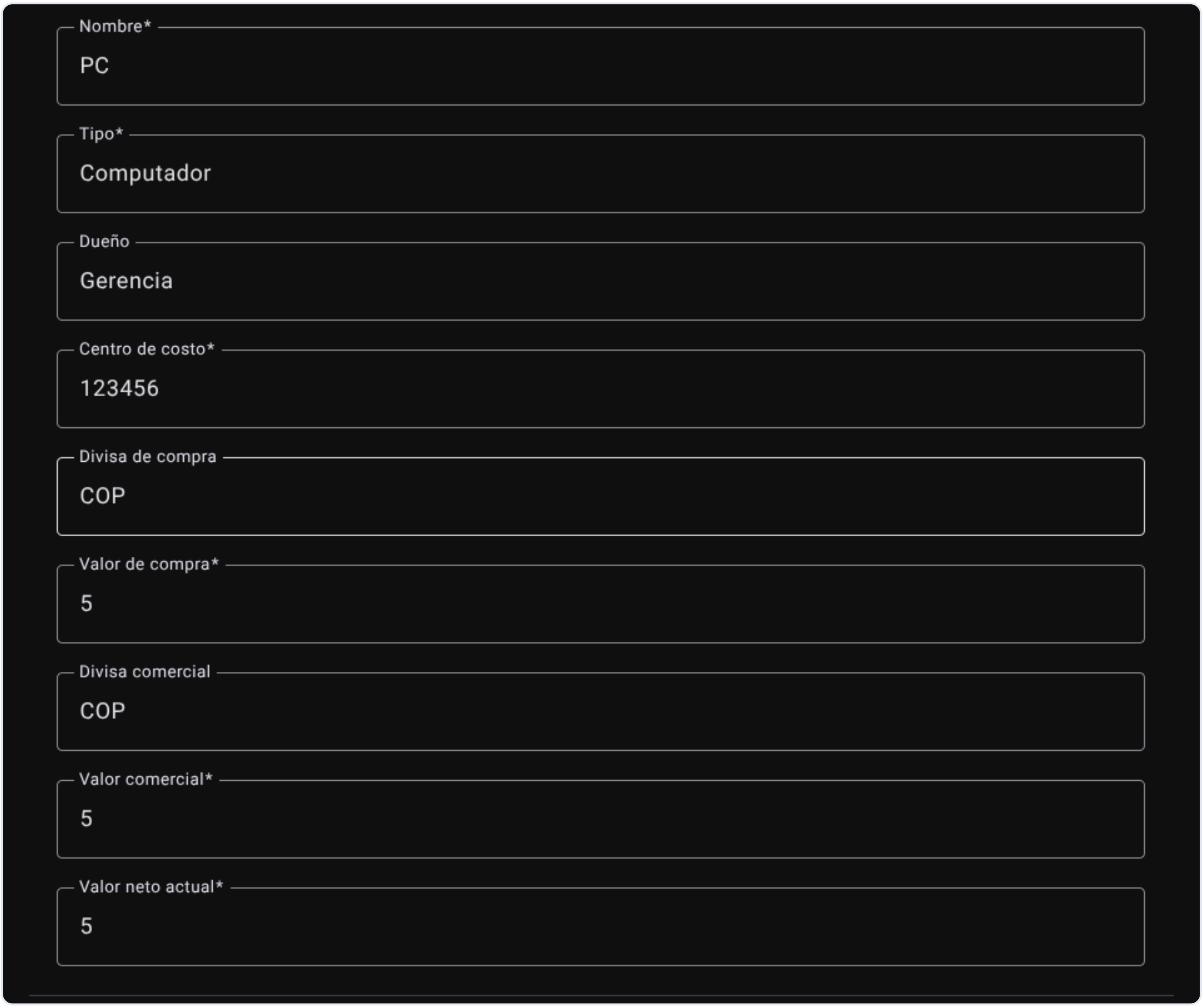


2. Add a Device

To register technological equipment:

1. Click the **"Add Device"** button in the panel header.

2. Complete the lateral form with the following technical and inventory data:
    - **Name:** Brand, model or unique identifier of the device (e.g. *ThinkPad L14 Gen 3*).
    - **Type:** Device category (e.g. *Laptop*, *Monitor*, *Server*).
    - **Owner:** Legal entity that owns the equipment (select from autocomplete list).
    - **Cost center:** 6-digit accounting code that assumes the depreciation of the asset.
    - **Purchase currency:** Currency in which the purchase invoice was made.
    - **Purchase value:** Invoiced purchase amount.
    - **Commercial Currency and Commercial Value:** Currency and current estimated resale value in the market.
    - **Current net value:** Book value of the device discounting accumulated depreciation.

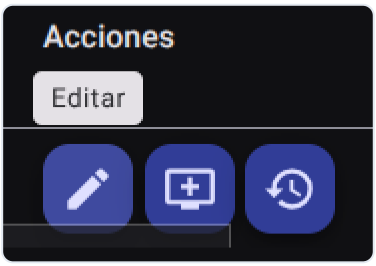


3. Press **"Add"** to save the asset to inventory as *Available* (no assignee assigned).

3. Edit a Device

To correct financial values, change the cost center, or update the equipment name:

1. Click **"Edit"** (pencil icon ✏️) in the device row.

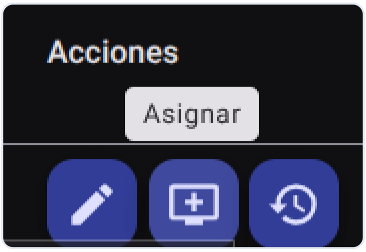


2. Adjust the data in the side panel and click **"Refresh"** to apply the changes immediately.

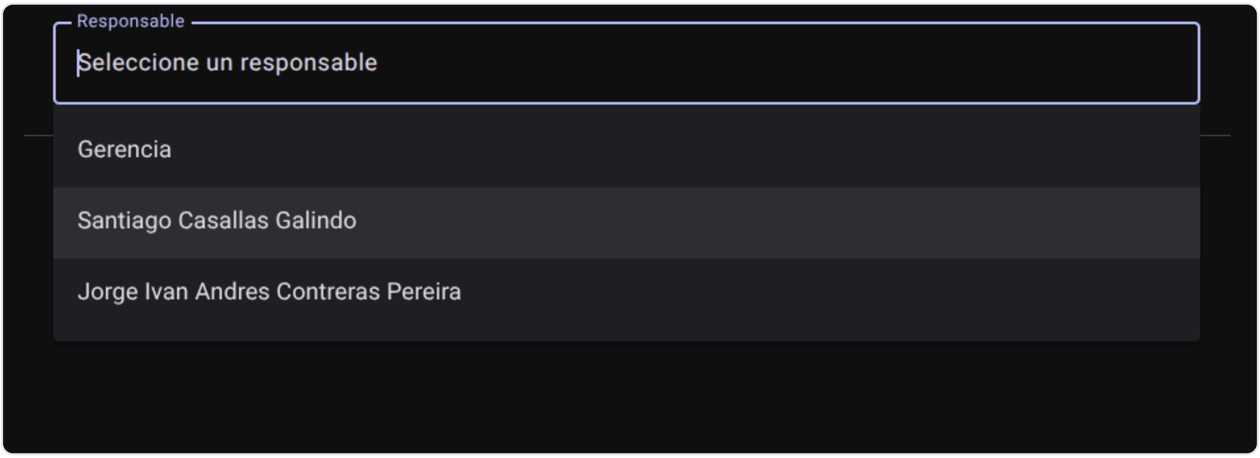
4. Assign Custody Responsible

To deliver a device to a collaborator or department:

1. Locate the available device in the list (identifiable because it has no name in the *Responsible* column and displays the **"Assign"** icon 📥).
2. Click the **Assign** button.



3. In the pop-up form, find and select the responsible collaborator from the auto-complete list.

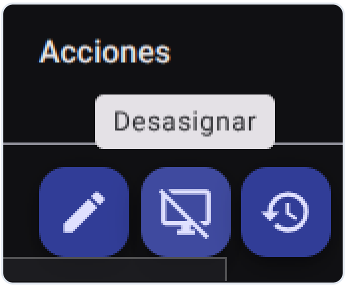


4. Click **"Assign"**. The system will update the equipment status, record the assignment date, and change the action icon.

5. Unassign or Unlock a Device

When a collaborator returns a piece of equipment (due to company retirement or technology renewal):

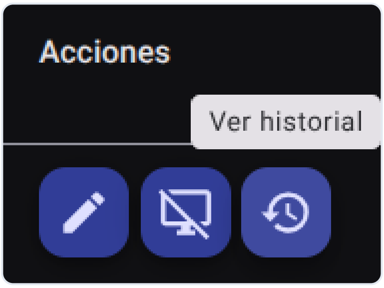
1. Locate the assigned device in the table and click **"Unassign"** (screen disabled icon 🖥️🚫).
2. Confirm the release in the security modal window. The responsible field will be empty and the team will once again be *Available* to be reassigned.



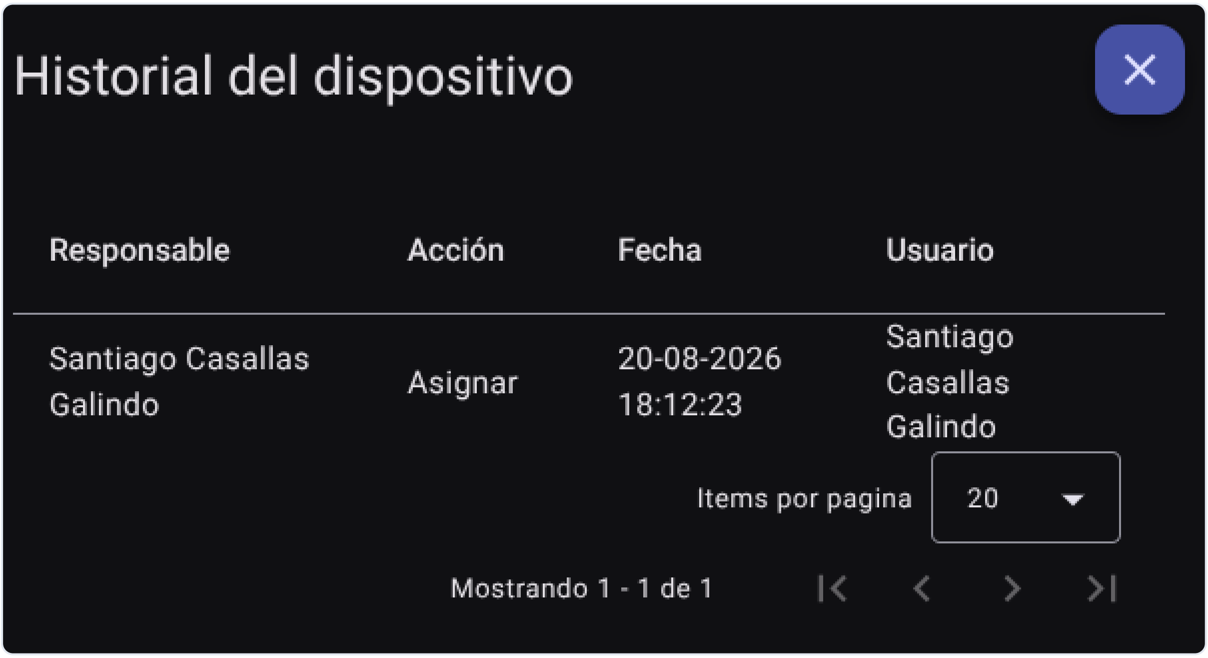
6. Consult Assignment History

To audit the usage history of a hardware asset:

1. Click the **"View History"** icon (clock icon with arrow) in the device row.



2. A temporary log will be displayed that shows the delivery and return dates, detailing each of the collaborators or departments that have had the device under their responsibility.



7. Export Device Inventory

Click the download button at the top right to export the complete inventory, with its purchase values, depreciation and history of active responsible parties, in **.CSV** format.

Required Technical Permits

Access to the management of technological assets is regulated by the following keys:

- `devices_read` : Allows you to enter the view, consult the inventory table and perform hardware searches.
- `devices_create` : Enables the action of adding new devices to the general inventory.
- `devices_update` : Grants access to the device's technical data editing forms.
- `devices_delete` : Enables the deletion of decommissioned assets.
- `devices_export` : Enables the export of the general list in `.CSV` file format.
- `devices_assign` : Allows you to perform the actions of assignment, unassignment and consultation of the history of those responsible for the devices.

Project Management

Description, Purpose and Objective

> **NOTE:** The **Project Management** view is the central ERP module that allows you to record and parameterize the operations and assignments of the organization's different developments, contracts or consultancies.
>
> A **Project** is a temporary and structured work unit that brings together human, technical and financial resources to meet a specific objective contracted by a **Client** (the external entity receiving the service). Each project has a **Suffix** (shortcode and project identifier), a **Billing Currency**, and allocations for storage (**Google Drive**), communication (**Email/Chat**), and technical integration (**Azure DevOps**).
>
> The objective of this view is to centralize the technical and administrative information sheet of the projects, defining the file repositories, communication channels, software integration credentials and the responsible manager or **PM** (Project Manager).

Context of Use

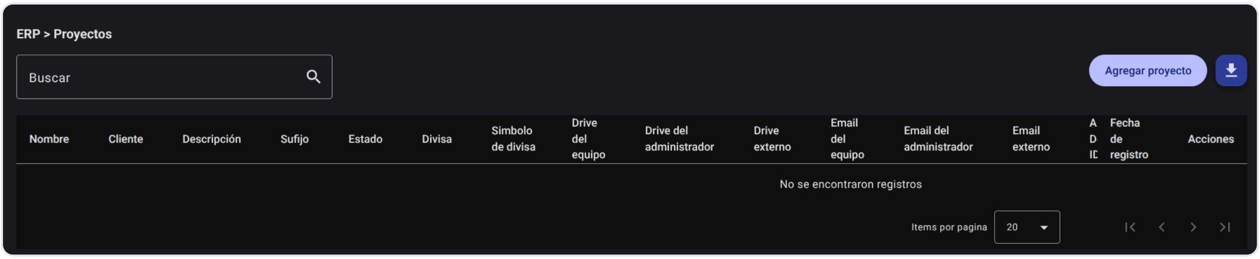
This module is used regularly by corporate management personnel and operations directors to:

- **Register new projects:** Link signed contracts to a client and configure your entire startup digital infrastructure.
- **Assign project leaders:** Formally designate the Project Manager (PM) responsible for payroll and expense approval.
- **Set up repositories and integrations:** Centralize Drive folder links for the technical team, administrators and externals, as well as link the project ID in Azure DevOps for synchronization of development tasks.
- **Update progress statuses:** Monitor and change the status of the project throughout its life cycle (e.g. Active, Paused, Completed).

Possible Actions

1. Consult and Search Projects

Allows you to view the general project table with all the columns configured in the system. Due to the volume of technical information, the table includes scroll bars and allows real-time searches by entering keywords in the upper search engine.



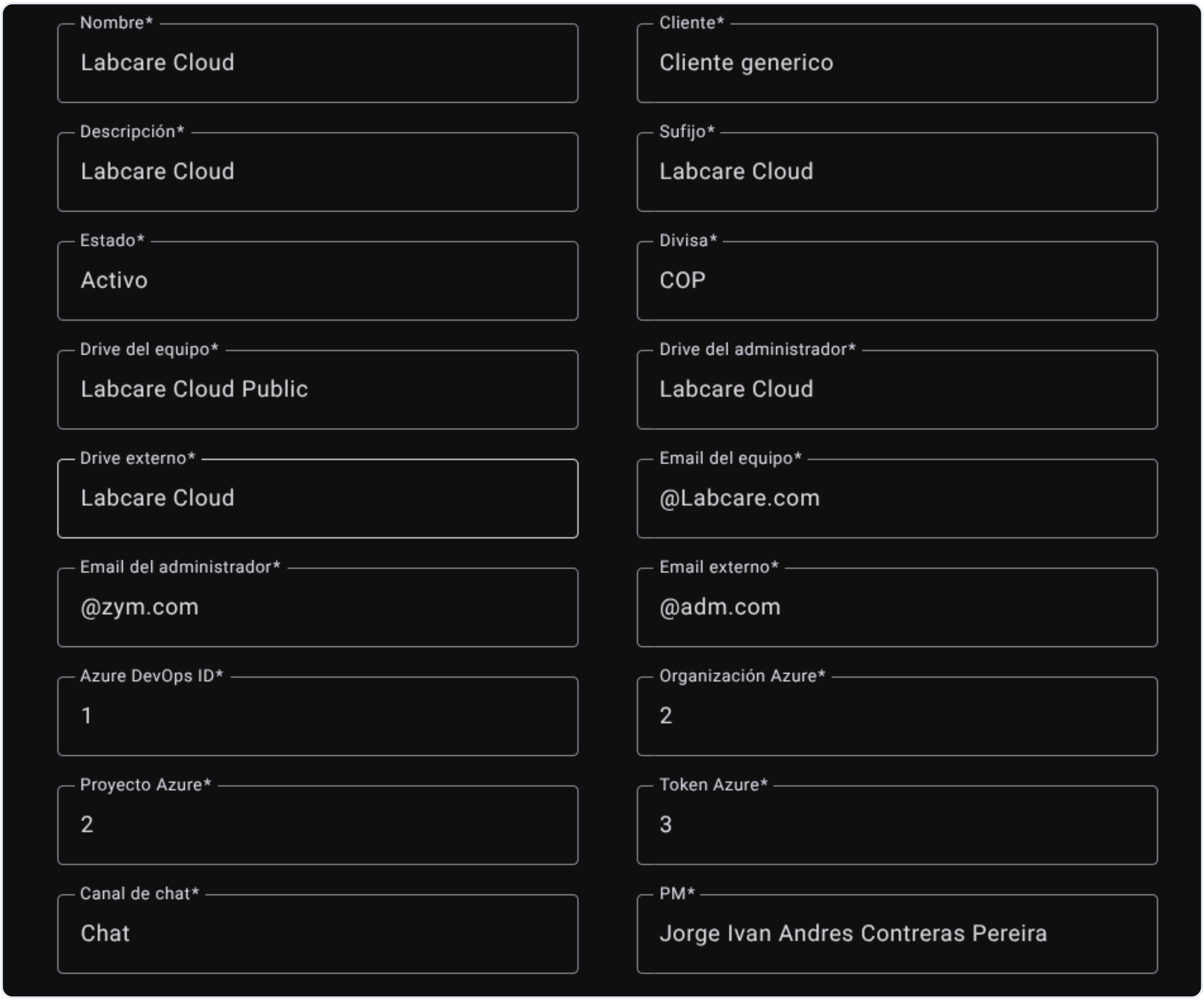
2. Add a New Project

To register a project on the platform:

1. Click the **"Add Project"** button at the top right of the table.

2. Fill out the lateral form divided into the following data blocks:
    - **Basic Information:**
        - **Name:** Full name of the project.
        - **Client:** Select from the auto-complete list of registered corporate clients.
        - **Description:** Detail or general scope of the project.
        - **Suffix:** Unique project identifier acronym (e.g. `MIDNA` or `PEEC`).
        - **Status:** Initial status of the project (e.g. `Activo`).
        - **Currency:** Select the currency in which the project is quoted and invoiced (e.g. `USD`, `COP`).
    - **Storage Infrastructure (Google Drive):**
        - **Team Drive:** Link or identifier of the shared development folder.
        - **Administrator Drive:** Link to the financial control and contracts folder.
        - **External drive:** Shared folder of deliverables visible to the client.
    - **Communication Channels:**
        - **Team email:** Group email address of the work team.
        - **Administrator email:** Project billing administrator email.

- **External email:** Email of the client's main contact. * **Chat channel:** Group chat channel identifier or link (e.g. Slack, Teams).
    - **Azure DevOps Integration:**
        - **Azure DevOps ID:** Project integration code.
        - **Azure Organization:** Name of the workspace in Azure.
        - **Azure Project:** Name of the project in the Azure DevOps repository.
        - **Azure Token:** Technical access token to enable automated synchronization.
    - **Operational Manager:**
        - **PM:** Select the Project Manager in charge from the autocomplete list.

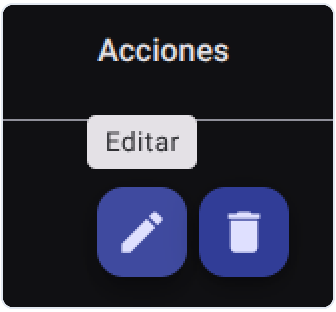


3. Press the **"Add"** button to register the project.

3. Edit a Project

If you need to modify or add integration parameters, change PMs, or update Drive folders:

1. Find the project in the table and click **"Edit"** (pencil icon ✏️).



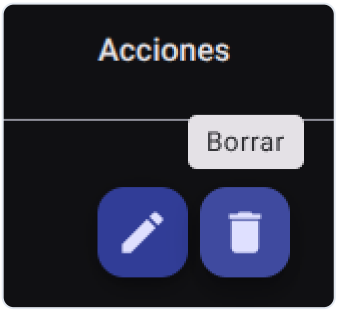
2. The side form will open with all the pre-established technical information.

3. Make the necessary changes to any of the fields. There are no restrictions on changing infrastructure bindings or credentials.
4. Click **"Update"** to apply the changes immediately.

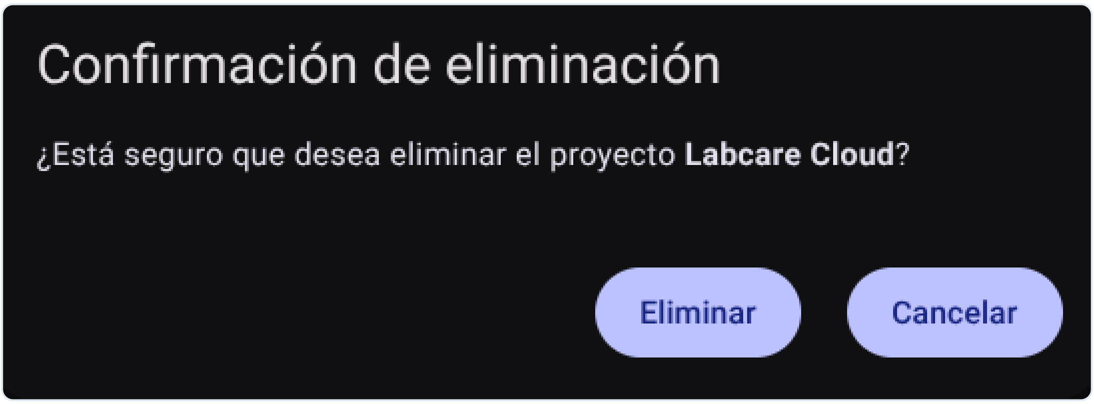
4. Delete a Project

To permanently delete a project tab:

1. Click the trash icon (🗑️) of the corresponding project.



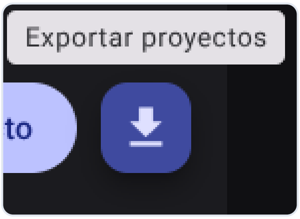
2. confirm the action in the verification modal.



> **CAUTION:** Deleting a project is irreversible. The system will block deletion if the project is being referenced in other active modules, such as current user contracts, posted refunds, or collaborator time tracking records.

5. Export Project Database

Allows you to download the organization's list of projects with all their technical data sheets and integrations. Click the download button in the table header to download a file in **.CSV** format.



Required Technical Permits

Viewing and managing the project catalog is governed by the following privileges in the user role:

- `projects_read` : Allows you to enter the view, list the projects and perform searches.
- `projects_create` : Enable the form for creating and inserting new projects.
- `projects_update` : Allows you to edit general information fields, Drive links, emails, and Azure tokens.
- `projects_delete` : Authorizes the definitive deletion of projects.
- `projects_export` : Allows downloading the general list in `.CSV` file format.

Expense Reimbursement Management

Description, Purpose and Objective

> **NOTE:** The **Refund Management** view is the ERP module in charge of processing, auditing and legalizing requests for refunds for representation expenses, travel expenses or minor purchases made by collaborators on behalf of the organization.
>
> A **Reimbursement Request** (or Expense Legalization) is an accounting record that associates a purchase or expense with a **Client**, a corporate **Project**, a **Category of Expenses** (e.g. Transportation, Food, Lodging, Materials), a gross **Invoice Amount**, a **Net Reimbursement** (the total to be returned to the employee in their corresponding currency) and a **Support** digital file (scanned invoice or payment receipt attached).
>
> The objective of this view is to automate and control the expense legalization flow, guaranteeing that each expense is supported by its respective invoice and has the authorization of the project leader and the accounting team.

Context of Use

This module is used by:

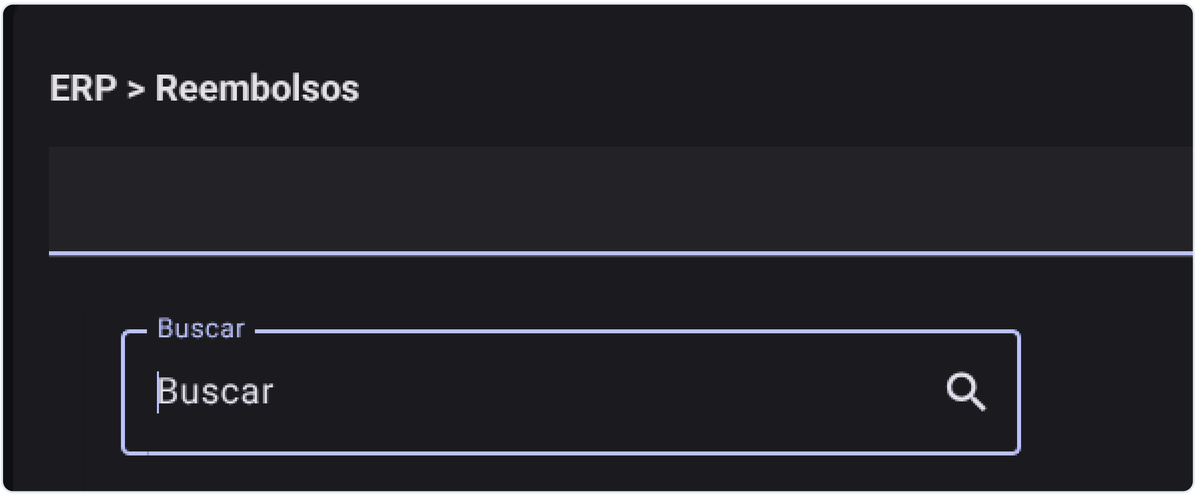
- **Collaborators:** To report and upload support for expenses incurred during the execution of their work for projects.
- **Project Managers (PMs):** To validate and authorize refunds associated with their projects and charge them to the corresponding client cost budget.
- **Accounting and Taxes:** To audit the tax validity of invoices (support) and authorize the payment of the refund.

Possible Actions

1. Consult and Search Refund History

Displays a table with all the user's requests, indicating: Client, Project, Expense Category, Expense Date, Frequency, Currency, Invoice Amount, Net Refund, Approval Status (Pending, Approved, Rejected) and the option to consult the attached support.

The search bar allows you to filter records by client, project, comments or statuses.

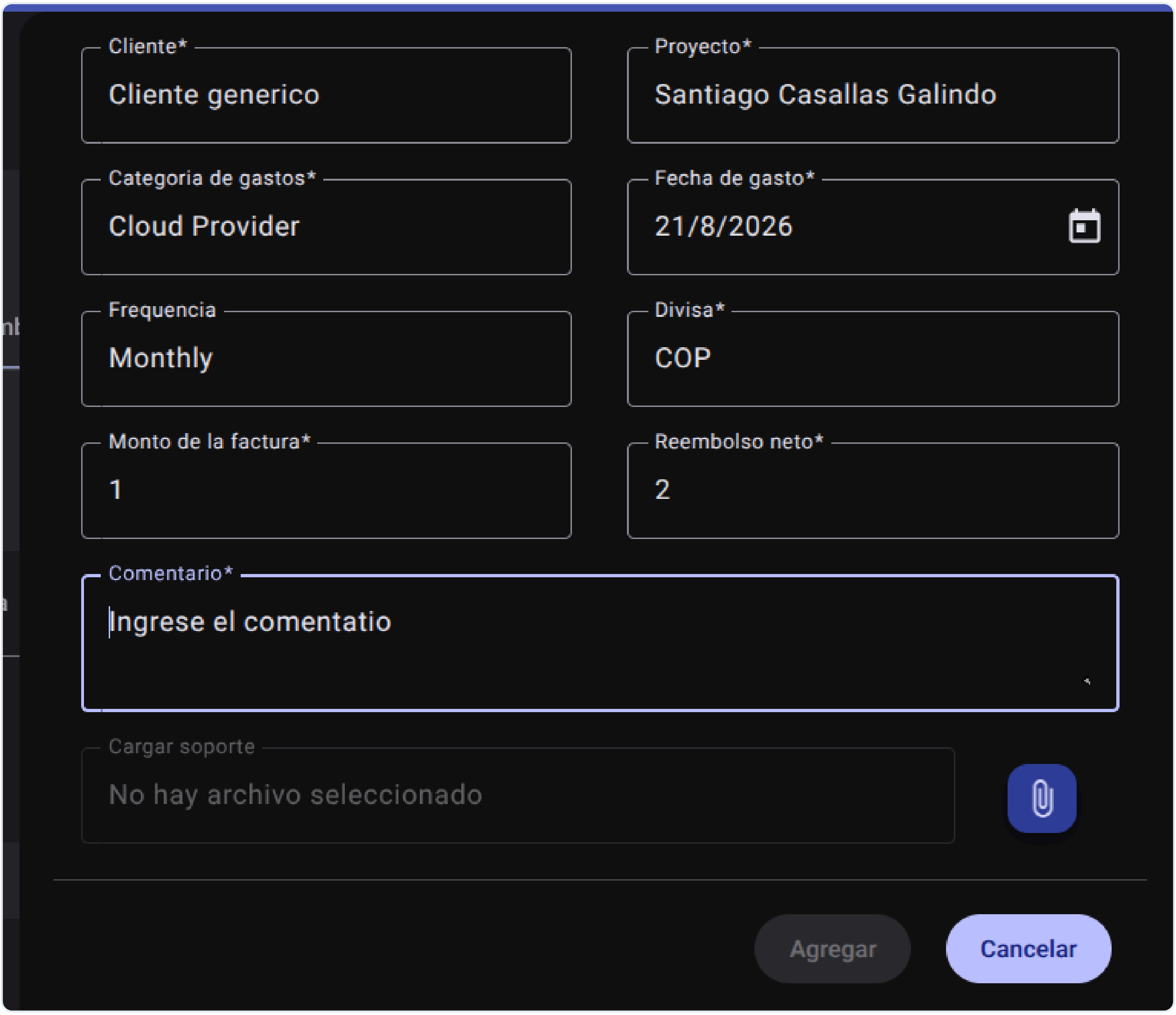


2. Add a Refund Request

To report an expense:

1. Click the **"Add Refund"** button on the top right.

2. Complete the side form with your purchase information:
    - **Customer:** Select from the autocomplete list the customer for whom the expense was made.
    - **Project:** Select the project associated with the expense from the autocomplete list.
    - **Expense category:** Classify the nature of the purchase (e.g. *Food*, *Travel*).
    - **Expenditure date:** Select the day the expense was incurred using the calendar.
    - **Frequency:** Specify if the charge is *One-time* or monthly.
    - **Currency:** Select the currency of the invoice.
    - **Invoice Amount:** Enter the total value of the invoice.
    - **Net Reimbursement:** Enter the actual value to be transferred to the collaborator.
    - **Comment:** Justify the reason for the expense clearly.
    - **Upload support:** Click on the attach file button (clip icon 📎) to upload the digital support of the invoice (allowed formats: PDF, JPG, PNG). The file name will be displayed on the screen.

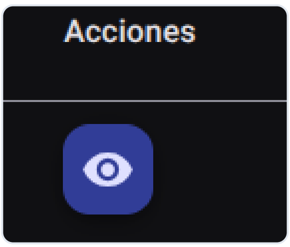


3. Click **"Add"** to submit the request.

3. View Invoice Support

To audit or review a receipt:

1. Click the **"View attached"** button in the refund actions column.



2. The system will open a new browser tab with the original PDF or image file uploaded to the cloud.

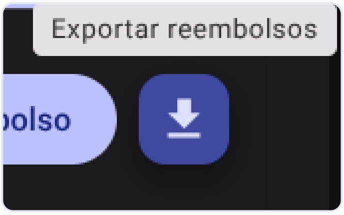
4. Refund Approval Flow (PM and Accounting)

Reimbursement requests follow an identical control hierarchy to payroll:

- **PM approval:** The Project Manager reviews the relationship between spending and project progress. Approves the request to transfer it to the accounting area, or rejects it if the expense was not included in the project budget.
- **Accounting Approval:** The accounting team verifies the support of the invoice against local tax regulations. Approve the final refund for your bank transfer.

5. Export Consolidated Expenses

Click on the top right download button to download the consolidated history of reimbursements and legalization of expenses in a file in **.CSV** format.



Required Technical Permits

The management and audit of refunds is regulated by the following permissions:

- `reimbursements_read` : Grants access to the panel and reading of personal reports.
- `reimbursements_create` : Enables the recording of expense legalization and the loading of billing supports.
- `reimbursements_update` : Allows the correction of rejected records.
- `reimbursements_export` : Allows you to download data in `.CSV` format.
- `reimbursements_approve_pm` : Authorizes the PM to approve or reject requests uploaded to their project.
- `reimbursements_approve_accounting` : Authorizes the finance team to perform the final support audit and order payment.

Time Recording and Tracking

Description, Purpose and Objective

> **NOTE:** The **Time Tracking** view (or Time Tracking) is the ERP module intended to record and control the work hours invested by collaborators in the different tasks and active projects of the organization.
>
> A **Time Tracker** (or Time Log) is an entry that associates a user's work day with a **Project**, a **Category** of activity (e.g. Development, Support, QA), a **Time Type** (e.g. Ordinary, Extra, Holiday) and a specific **Task** (which can be synchronized from external repositories such as GitHub).
>
> The objective of this view is to automate the organization's time control, serving as a direct input for the calculation of project costs, billing to the end client and the generation of news for payroll settlement.

Context of Use

This module is used daily by:

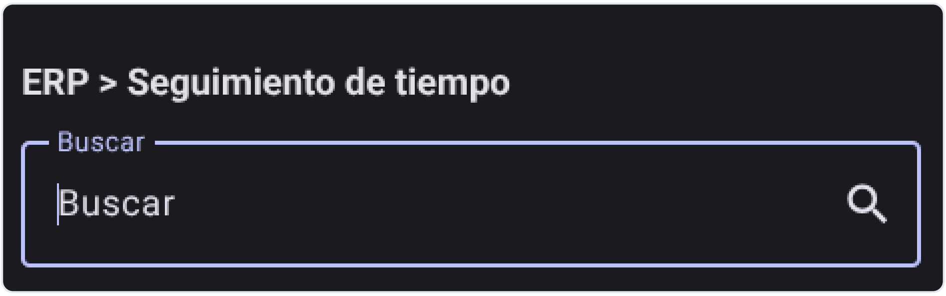
- **Collaborators:** To record their daily hours worked and the activities executed in each assigned project.
- **Project Managers (PMs):** To audit the hours reported by your team and validate real progress against the hours budget assigned to the project.
- **Administration and Accounting:** To export monthly consolidated reports that feed payroll and billing.

Possible Actions

1. Consult and Search Reported Hours

Displays a table with the user's time record (or the entire team if they have a supervisor/PM role). Details: Project, Work Category, Type of time, Name of the task (and Issue number if applicable), Date, Hours worked and Explanatory comments.

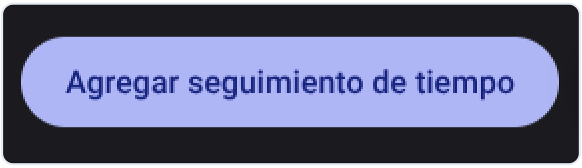
The top search bar allows you to filter the table by specific project, task, date, or comments.



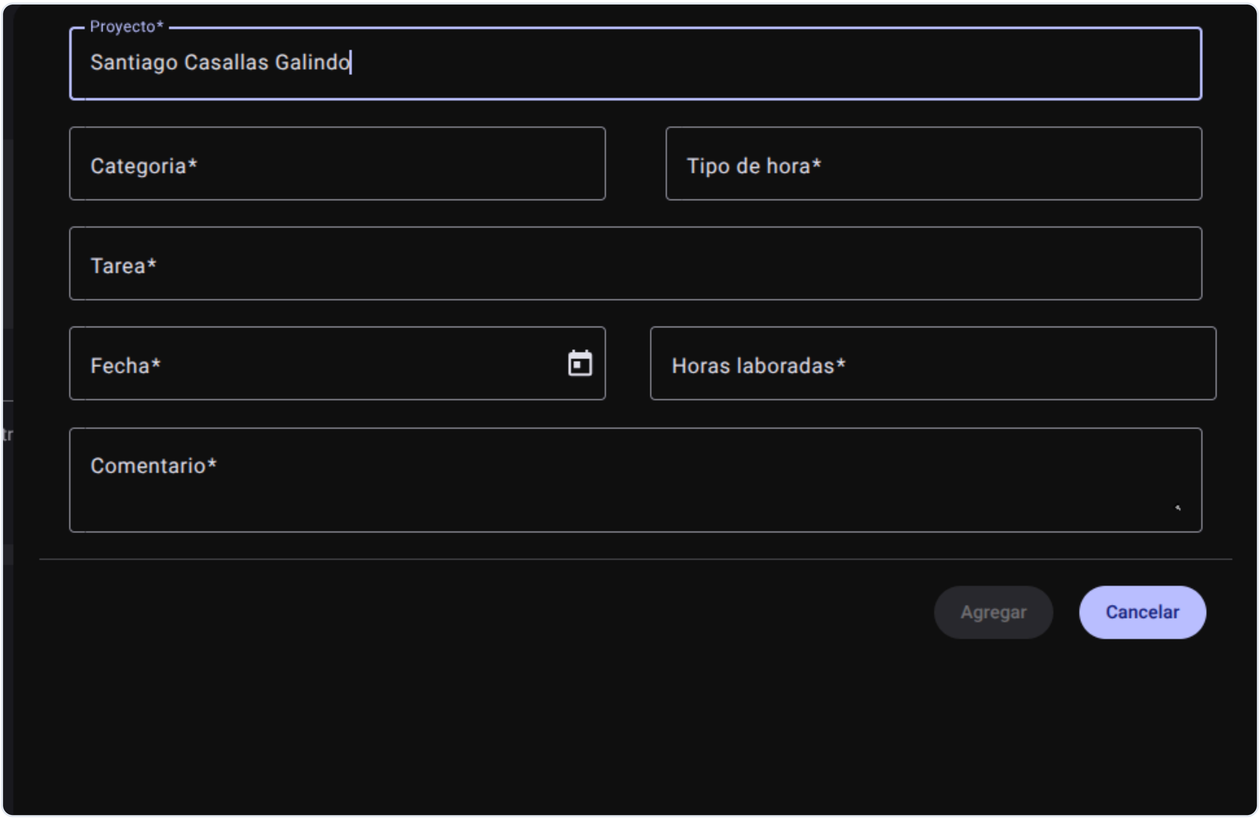
2. Register a New Time Report

To enter the hours worked in a day:

1. Click **"Add Time Tracking"** in the header.



2. Complete the information requested in the side form:
   - **Project:** Select the assigned project you worked on from the drop-down list.
   - **Category:** Classify the type of activity (e.g. *Development*, *Meeting*, *Design*).
   - **Time type:** Select the corresponding time type (e.g. *Ordinary*, *Extra Night*, *Holiday*).
   - **Task:** Select the specific task from the autocomplete list. If the project is synchronized with development repositories, the tasks will show the corresponding issue number (e.g. `#123`).
   - **Date:** Indicate the day of the report using the calendar.
   - **Hours worked:** Enter the number of hours spent on the task (e.g. `4` or `8`).
   - **Comment:** Briefly describe the activities carried out to justify the report.

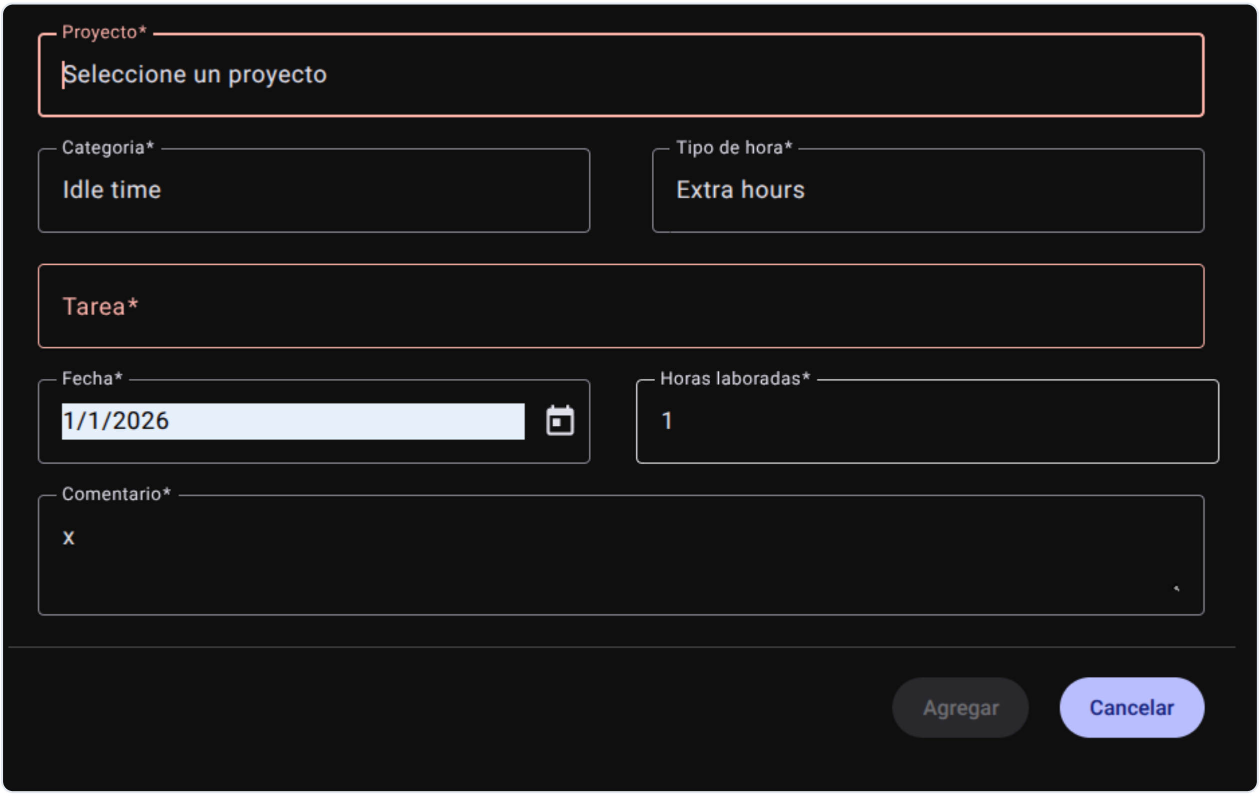


3. Press **"Add"** to save the report.

3. Synchronize Repository Tasks (GitHub)

If the collaborator requires reporting hours on technical development issues newly created in the repository:

1. Click the **"Sync Tasks"** button at the top right of the table.
2. The system will load updated issues and tasks from the repositories linked to the project in the background (via GitHub/DevOps integration).
3. Once the synchronization is complete, the **Task** field drop-down menu will show the new tickets available to report hours.



4. Edit a Time Report

If you made a mistake in the time count, date or comments:

1. Click **"Edit"** (pencil icon ✏️) in the record row.
2. Adjust the values in the side panel and click **"Refresh"** to save.

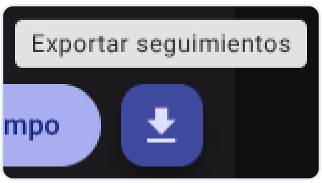
> **IMPORTANT:** Editing of reported hours may be blocked for old time periods that have already been processed and closed in the monthly payroll.

5. Delete a Time Report

Click the trash icon (🗑️) on the record and confirm the action in the pop-up box to override an incorrect time report before it is administratively closed.

6. Export Hour Reports

To generate billing sheets or project management reports, click the download button at the top right of the table. A file in **.CSV** format will be downloaded with the breakdown of reported hours.



Required Technical Permits

Access to this module is controlled by the following permissions in the role profile:

- `time_tracking_read` : Allows you to enter the view, view the time table and perform searches.
- `time_tracking_create` : Enables the action of reporting new work hours and synchronizing external tasks.
- `time_tracking_update` : Allows you to correct time reports that are not administratively closed.
- `time_tracking_delete` : Allows you to cancel or delete hour reports.
- `time_tracking_export` : Authorizes the download of the hour breakdown in `.CSV` format.

Linking Users and Projects

Description, Purpose and Objective

> **NOTE:** The **User and Project Linkage** view is the ERP section designed to manage the allocation of the organization's human capital to the different active projects, establishing the operational and financial parameters of each relationship.
>
> An **Assignment** is the formal registration that links a **User** (collaborator or specialist) with a **Project** (development, consulting or service contracted by a client) during a specific period. Through this module, the hourly cost rates and the agreed daily availability for each resource are defined.
>
> The objective of this view is to centralize and control operational assignments, facilitating automatic payroll calculation, time tracking reconciliation, and project cost auditing.

Context of Use

This module is used by the administration team and Project Managers (PM) to:

- **Plan resources:** Assign developers, consultants or leaders to specific projects with clear effective dates.
- **Control costs:** Define the hourly rate that the collaborator represents for the project in order to project financial margins.
- **Establish capacities:** Declare the contracted or planned daily hourly intensity to avoid work overloads.
- **Audit relationships:** Consult the history and current status of labor relationships associated with the organization's projects.

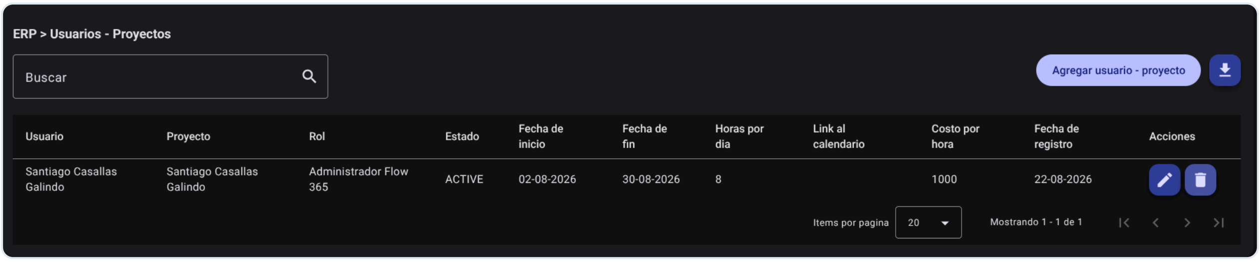
Possible Actions

1. Query and Export of Links

It allows you to view the consolidated list of all user-project assignments in an interactive table that shows the name of the collaborator, the assigned project, the effective dates, the role, the cost rate, the agreed schedule and the status of the assignment.

- **Filter and Sort:** Enter a user or project name in the search bar (*Search*) to filter results in real time. You can also click the column headers (**User**, **Project**, **Status**, **Hours per day**, **Cost per hour**) to reorder the table alphabetically or numerically.

- **Export Data:** Click on the blue button with the download icon located next to the create button to download the general consolidated linkages in **.CSV** spreadsheet format.

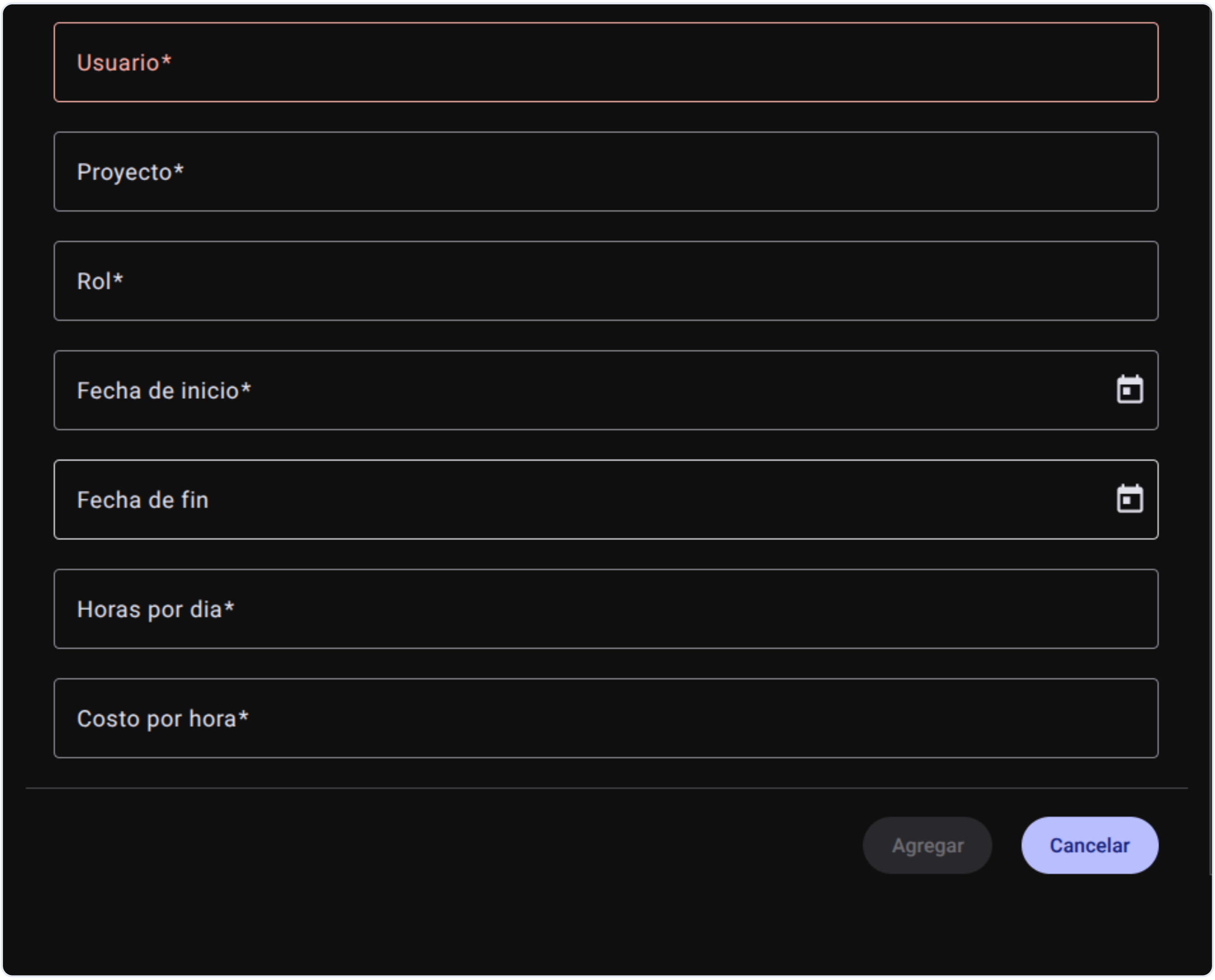


2. Assign a User to a Project

To link a new collaborator to a project registered in the system:

1. Click the **Add User - Project** button located in the upper right corner of the view.

2. A right side panel will appear. Fill out the following fields of the form:
   - **User*:** Select the collaborator's name from the autocomplete drop-down menu.
   - **Project*:** Select the project to which the resource will be assigned.
   - **Role*:** Select the operational or administrative role you will play within that project (e.g. Developer, PM, Designer).
   - **Start Date*:** Define the start date of the assignment using the calendar selector.
   - **End Date:** Define the estimated end date of the assignment period (leave empty if indefinite).
   - **Hours per day*:** Enter the agreed daily time intensity for the project.
   - **Cost per hour*:** Define the monetary cost of each hour of work performed by this user in the project.

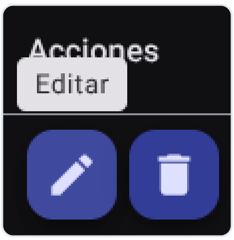


3. Click **Add** to register the pairing. If you wish to decline the operation, click **Cancel**.

3. Edit an Existing Assignment

If you need to modify the financial terms, time availability or effective dates of the collaborator:

1. Identify the assignment in the overview table and click the pencil icon (✏️) within the actions column.

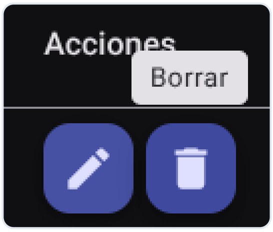


2. The side panel preloaded with the assignment information will open. Modify the necessary data (for example, update the hourly cost for a salary adjustment or change the project end date).
3. Click **Update** to save your changes immediately.

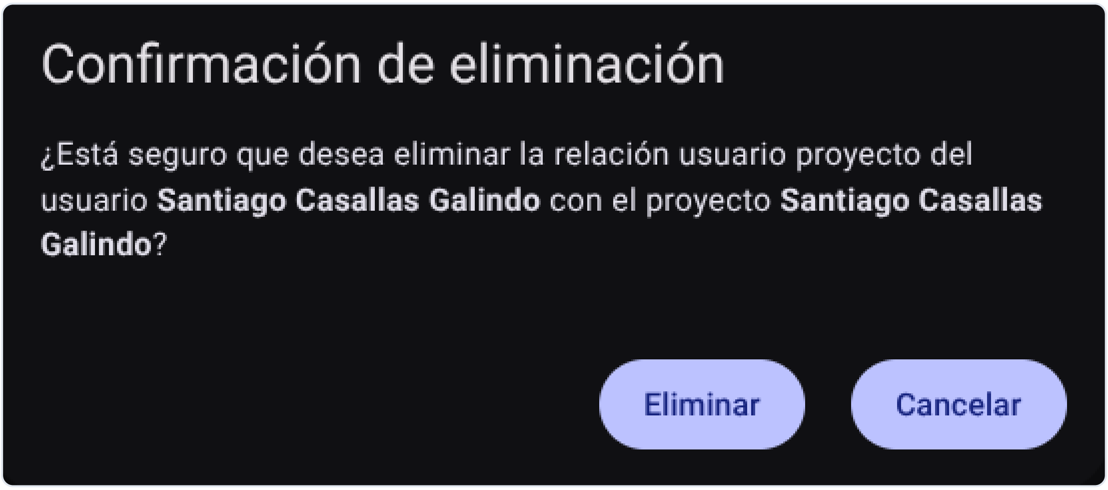
4. Delete an Assignment (Unbind)

To formally unassign a user to a project:

1. Click the trash icon (🗑️) in the corresponding row.



2. The system will display an alert modal with a confirmation request: *Are you sure you want to delete the user project relationship of the user [User Name] with the project [Project Name]?*



> **CAUTION:** Deleting a user-project link could result in the loss of historical records in the automatic payroll calculation and consolidated financial reports of that project if there are hours charged to the relationship.

Required Technical Permits

Viewing and managing user and project bindings are governed by the following privileges:

- `user_projects_read` / `user_projects_list` : Allows access to the view, viewing registered assignments and performing relationship searches.
- `user_projects_create` : Enable the button and side panel to register a new assignment.
- `user_projects_update` : Allows editing of rates, effective dates and hours in existing links.
- `user_projects_delete` : Enables the physical deletion action of the database record.

- `user_projects_export`: Allows you to download the consolidated assignment report in `.CSV` format.