

# Manual Use

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AJ Monteiro – Client Portal



ITGest - Software e Sistemas Informáticos, Lda.

12/07/2024

Controlled Document  
IT-042-14-05  
User Manual

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## Table of Contents

1	INTRODUCTION .....	4
2	MANUAL STRUCTURE.....	5
A1.	Manual.....	5
3	AUTHENTICATION PAGE.....	6
A1.	Authentication.....	6
B1.	Forgot Password .....	7
3.B.1	Password Recovery Email .....	8
4	MAIN PAGE.....	9
A1.	Main Page .....	9
4.A.1	Language .....	10
4.A.2	Profile .....	10
5	Budgeting Module.....	12
A1.	Budgeting .....	12
B1.	Approve or Reject budget .....	13
C1.	View budget.....	13
6	Worksheets Module .....	15
A1.	Worksheets.....	15
B1.	View Worksheet.....	15
C1.	Budgeting .....	17
D1.	Approve or Reject Budget.....	17
E1.	View Budget .....	18
7	Invoices Module.....	19
A1.	Invoices .....	19
B1.	Invoices – View credit notes.....	20

# 1 INTRODUCTION

This manual provides a detailed description of the functionalities available on the Client Portal platform.

This platform's main objective is to consult by client the worksheets, budgets and invoices generated, as well as budget approvals.

Thus, you will have access to all detailed information through the following modules:

- **Profile**
  - In this module you will have access to the client's user information.
- **Budgets**
  - In this module, you can view, approve or reject, and comment on the client's budgets.
- **Worksheets**
  - In this module, you can view the client's worksheets.
- **Invoices**
  - In this module you will be able to view the invoices generated from the client.

## 2 MANUAL STRUCTURE

This structure is used to provide users with a clearer experience of browsing and understanding how to use the system or website.

### A1. Manual

#### 1. Within the Modules:

- **Navbar** – Each module may have a navigation bar (Navbar) that contains links or specific options for that module.
- **Sidebar** – Within each module, there may be a specific sidebar containing options or features relevant to that module.
- **Footer** - There may be a footer at the end of each module that may contain additional information or useful links.
- **Layout** - The general layout of the module is mentioned, which may include the arrangement of different components.

#### 2. Components:

- **Components** - Within each module, there are different types of components that offer specific functionalities.
- **Toolbar** - Some type of toolbar or options that allow users to perform specific actions.
- **Filters** - Ability to apply filters to refine results or displayed content
- **Favourites** - Ability to mark items or content as favourites for easy later access.
- **Table**: Inclusion of tables to display tabular data in an organised manner.

#### 3. Numbering and Letters:

- **Numbering** - Website pages or modules are numbered sequentially [1, 2, 3...].
- **Letters** - Letters (such as A1, B1, B2) are used to indicate different parts within a module, such as Layout (A1), Sidebar (B1), Navbar (B2), etc.
- **Numbers and Letters** - The combination of numbers and letters (such as 5.E1, 7.B.1, 8.T.2) is used to represent hyperlinks or specific pages within a given layout or section.

This organisational structure allows users to understand the hierarchy of the system or website, as well as facilitating navigation and location of desired information.

## 3 AUTHENTICATION PAGE

### A1. Authentication



To open the application you must access the website, which in turn will find the page to log in.

<b>Username ( Required )</b>	User name
<b>Password ( Required )</b>	User password
LOGIN	<a href="#">Main page</a>

## B1. Forgot Password



**MONTEIRO**  
PARQUE E REPARAÇÕES DE CONTENTORES, LDA.

### Welcome

Please enter your details

Username

Password

[Forgot your password?](#)

Login

To access this section, you will need to click on "**Forgot your password?**".



### Forgot your password?

Do not worry we will send you instructions to reset your password

Email

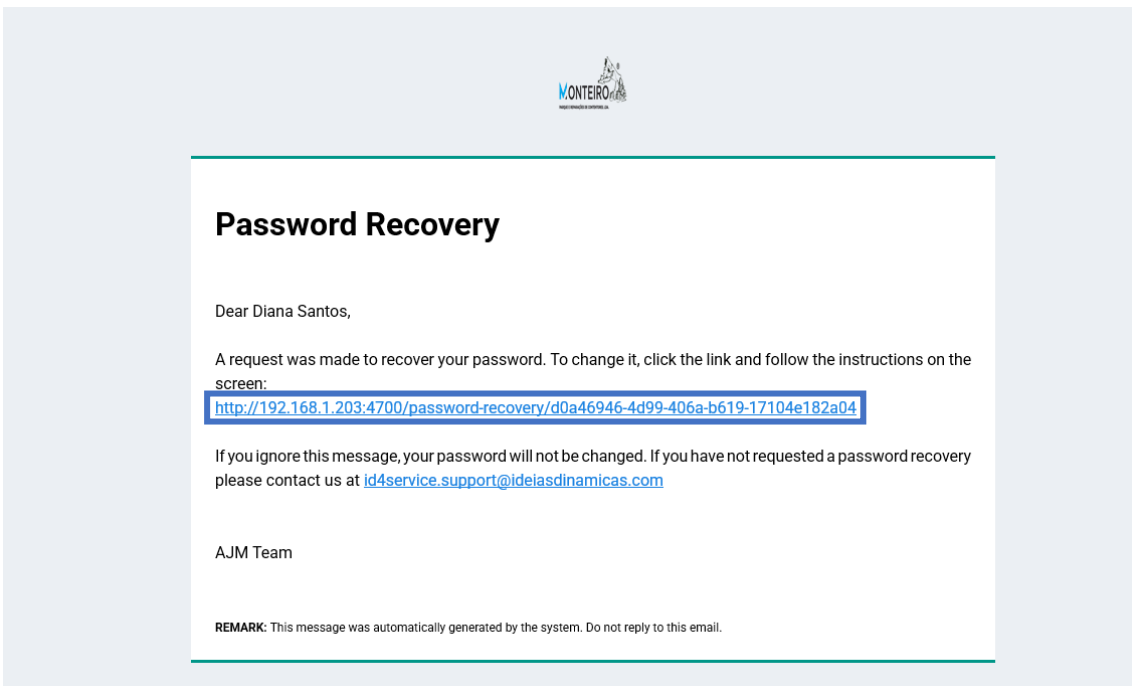
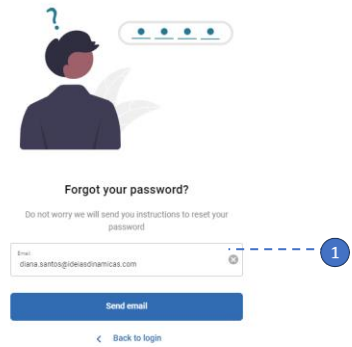
Send email

[Back to login](#)

<b>Email</b>	
<a href="#">Send email</a>	<a href="#">Access to password recovery email</a>
<a href="#">Back to login</a>	<a href="#">Access to authentication</a>

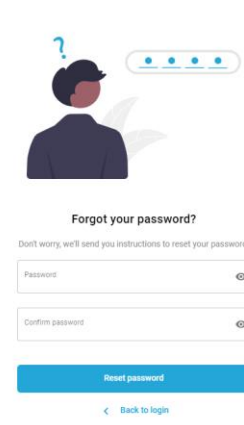
Check your email to continue the process	Informative message
--	---------------------

### 3.B.1 Password Recovery Email



After receiving the "Password Recovery" email, you will need to click on the link and will be directed to the password change page.





Page to recover the client's password.

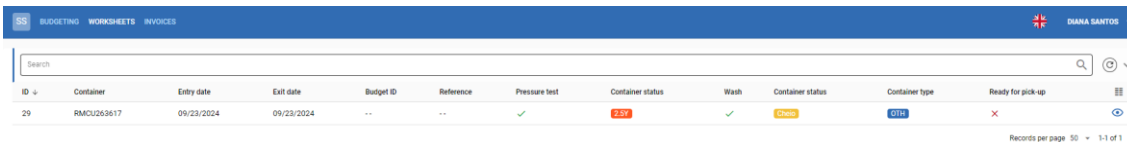
<b>Password ( Required )</b>	User password
<b>Confirm Password ( Required )</b>	User password

<a href="#">Reset password</a>	<a href="#">Access to authentication page</a>
<a href="#">Back to login</a>	<a href="#">Access to authentication</a>

	Warning message – password reset successfully
--	---

## 4 MAIN PAGE

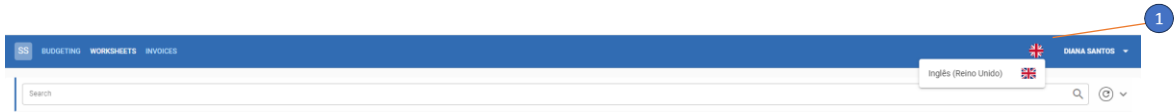
### A1. Main Page



To access this page, you must log in through your user account, this way you will have access to the platform.

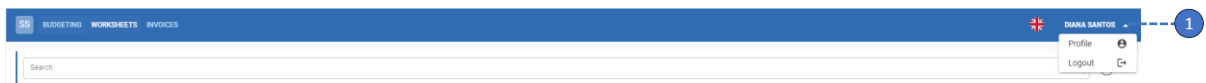
	Platform search bar
--	---------------------

## 4.A.1 Language

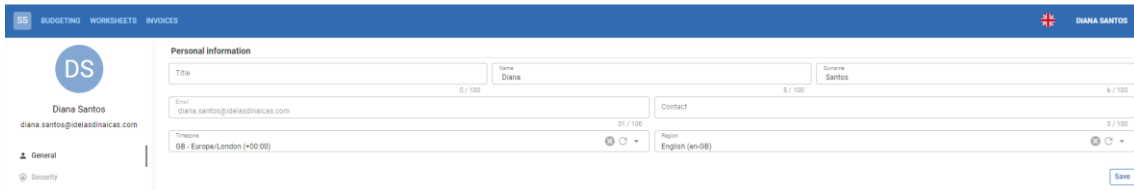


To access this modal, you should click on the flag icon in the Navbar and then on the icon of the desired language. In this modal, you will have access to Portuguese and English (United Kingdom) languages.

## 4.A.2 Profile

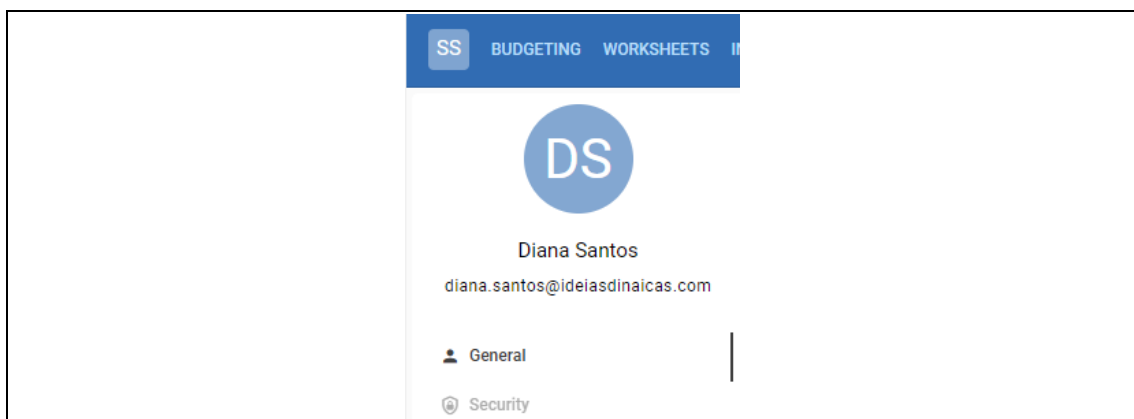


To access this modal, you should click on the  button in the Navbar and then on the profile icon.




This page represents the detailed client profile data.

- **Photo**



Choose a picture ✕



No image

↶ ↷ ↔ ↕ 🔍 🔍 📄 🗑️

Cancel Add

<span>↶</span> <span>↷</span>	Rotate image right or left
<span>↔</span> <span>↕</span>	Flip image horizontally or vertically
<span>🔍</span> <span>🔍</span>	Zoom in or out image
<span>📄</span> <span>🗑️</span>	Upload/Delete image

<span>Cancel</span>	Exit modal	<span>Add</span>	Update data
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- **General**




**Personal information**

Title	Name Diana	Surname Santos
0 / 100	5 / 100	6 / 100
Email diana.santos@ideadimicas.com	Contact	
31 / 100	0 / 100	
Timezone GB - Europe/London (+00:00)	Region English (en-GB)	
<span>Save</span>		

<b>Title</b>	<b>Name</b>
<b>Surname</b>	<b>Email</b>
<b>Contact</b>	<b>Timezone</b>
<b>Region</b>	

<span>Save</span>	Save/Update profile changes
-------------------	-----------------------------


- **Security**

<p><b>Password</b></p> <p>Current Password <input type="password"/>  0 / 100</p> <p>New password <input type="password"/>  0 / 100</p> <p>Confirm Password <input type="password"/>  0 / 100</p> <p><b>Save</b></p>	
<b>Current Password</b>	
<b>New Password</b>	
<b>Confirm Password</b>	

<b>Save</b>	Save/Update profile changes
-------------	-----------------------------



## 5 Budgeting Module



### A1. Budgeting



ID	Container	Expected entry date	Status	Container status
39	Container 2	10/02/2024	Aberto	OK

To access the "**Budgeting**" module, you should click on the "**Budgeting**" button in the Navbar.

	Refresh data
	Button to expand filter options
<b>Search</b>	Search bar
<b>Clients</b>	
<b>Family</b>	
<b>Status</b>	
<b>Expected entry date (Begin)</b>	
<b>Expected entry date (End)</b>	
<b>Expected departure date (Begin)</b>	
<b>Expected departure date (End)</b>	

<b>Creation date (Begin)</b>	
<b>Creation date (End)</b>	
	View budget
	Approve or Reject budget

## B1. Approve or Reject budget

To approve or reject a budget, you should click on the corresponding icons.




## C1. View budget

You can view the budget detail page, specifically the attachments and comments.

Budget details #39

**Client Details**

TIN 505266202	Name Super Bock Bebidas, S.A	Tax number Super Bock Bebidas, S.A
Contact 229052100	Country 	Address Via Norte Apartado 1044
Currency EUR	Free depo No. 0	

**document.container-details**

Container Contendor 2	Expected entry date 10/02/2024	Expected exit date ..
Size 20	Container status Empty	Container type ..
Pressure test X	Wash X	

Code	Unit.	Quant. (days)	Unit. Price	Desc. 1	Desc. 2	Total
[InspCont] - Inspeção Contendor:	UN	1	40,00 €	0.00%	0.00%	40,00 €
Total W/ Discount						€0.00
Total Discount						€0.00
Total						€40.00

[Attachments and Comments](#) [Close](#)

<a href="#">Close</a>	Close budget
<a href="#">Attachments and Comments</a>	View attachments and add/view comments

You can make comments on the budget by clicking the [Attachments and Comments](#) button and then click on the **Comments** tab. Then, you should type in the text box and click the [Close](#) button.

Budget details #39 X

Attachments Comments

---

**DS** DIANA SANTOS

Parágrafo Save

B I 🔗 ☰ ☰ ☰ 🗑️ 🗨️ 📅 ↶ ↷ ☰ A Δ AI A<sup>2</sup> 🖌️ — T Ω ↶ ↷ U

---

**DS** DIANA SANTOS (diana.santos@ideiasdinaicas.com) Delete

📅 10/03/2024 16:23:18

Rejected

Document Details Close

<span>Document Details</span>	Return to budget details
<span>Save</span>	Save comment
<span>Delete</span>	Delete comment

Budget details #39 X

Attachments Comments

---

**DS** DIANA SANTOS

Parágrafo Save

B I 🔗 ☰ ☰ ☰ 🗑️ 🗨️ 📅 ↶ ↷ ☰ A Δ AI A<sup>2</sup> 🖌️ — T Ω ↶ ↷ U

**Are you sure you want to continue?**

This action will be irreversible

No Yes

---

**DS** DIANA SANTOS (diana.santos@ideiasdinaicas.com) Delete

📅 10/03/2024 16:04:32

Aprovo

---

**DS** DIANA SANTOS (diana.santos@ideiasdinaicas.com) Delete

📅 10/03/2024 16:02:06

Approved

Document Details Close

<span style="font-size: 1.2em;">✔</span> <b>Comment deleted successfully</b> <span style="float: right;">X</span>	Warning message – comment successfully deleted
---	--

## 6 Worksheets Module

### A1. Worksheets

ID	Container	Entry date	Exit date	Budget ID	Reference	Pressure test	Container status	Wash	Container status	Container type	Ready for pick-up
42	Contendor 2	10/09/2024	--	--	--	X	--	X	Good	DT1	X
29	RMCI263617	09/23/2024	09/23/2024	--	--	✓	OK	✓	Good	DT1	X

To access the "**Worksheets**" module, you should click on the "**Worksheets**" button in the Navbar.

	Refresh data
	Button to expand filter options
<b>Search</b>	Search bar
<b>Status</b>	
<b>Entry date (Begin)</b>	
<b>Entry date (End)</b>	
<b>Departure date (Begin)</b>	
<b>Departure date (End)</b>	
<b>Creation date (Begin)</b>	
<b>Creation date (End)</b>	
	View worksheet

### B1. View Worksheet

You can view the worksheet detail page, specifically the attachments.

Worksheet details #42

**Client Details**

TIN 505266202	Name Super Bock Bebidas, S.A	Tax number Super Bock Bebidas, S.A
Contact 229052100	Country 	Address Via Norte Apartado 1044
Currency EUR	Free depo No. 0	

**Container Details**

Container Contentor 2	Entry date 10/03/2024	Exit date ..
Size 20	Container status Cheio	Container type OTH
Pressure test X	Wash X	

Code	Unit.	Quant. (days)	Unit. Price	Desc. 1	Desc. 2	Total
[TransContc] - Transbordo Contentor Cheio: 176 <span style="color: green;">Invoiced</span>	UN	1	24,00 €	0.00%	0.00%	24,00 €
[Dd] - Depot:	UN	0	10,00 €	0.00%	0.00%	0,00 €
					Total W/ Discount	€24.00
					Total Discount	€0.00
					<b>Total</b>	<b>€24.00</b>

[Attachments](#) [Close](#)

<a href="#">Close</a>	Close worksheet
<a href="#">Attachments</a>	View worksheet attachments

You can view the attachments by clicking the [Attachments](#) button.

Worksheet details #42

[Attachments](#)

Invoice document.pdf ↓

[Document Details](#) [Close](#)

<a href="#">Document Details</a>	Return to budget details
<a href="#">Close</a>	Close worksheet



## C1. Budgeting

ID	Container	Expected entry date	Status	Container status
39	Contentor 2	10/02/2024	Aberto	Visto
44	c0MTEW0EWQ	10/31/2024	Aberto	Chao
45	w0ew0ew0ew0e	10/08/2024	Pendente	Chao
46	CONTENTOR1717	10/24/2024	Pendente	Chao

To access the "Budgeting" module, you should click on the "Budgeting" button in the Navbar.

Search	
Entry date (Begin)	Entry date (End)
Departure date (Begin)	Departure date (End)
Creation date (Begin)	Creation date (End)
Status	
	Refresh data
	Button to expand filter options
<b>Search</b>	Search bar
<b>Clients</b>	
<b>Family</b>	
<b>Status</b>	
<b>Expected entry date (Begin)</b>	
<b>Expected entry date (End)</b>	
<b>Expected departure date (Begin)</b>	
<b>Expected departure date (End)</b>	
<b>Creation date (Begin)</b>	
<b>Creation date (End)</b>	
	View budget
	Approve or Reject budget

## D1. Approve or Reject Budget

To approve or reject a budget, you should click on the corresponding icons.

## E1. View Budget

You can view the budget detail page, specifically the attachments and comments.

Budget details #39

**Client Details**

TIN 505266202	Name Super Bock Bebidas, S.A	Tax number Super Bock Bebidas, S.A
Contact 229052100	Country 	Address Via Norte Apartado 1044
Currency EUR	Free depo No. 0	

**Container Details**

Container Contentor 2	Expected entry date 10/02/2024	Expected exit date ..
Size 20	Container status Vazio	Container type --
Pressure test X	Wash X	

Code	Unit.	Quant. (days)	Unit. Price	Desc. 1	Desc. 2	Total
[InspCont] - Inspeção Contentor:	UN	1	40,00 €	0.00%	0.00%	40,00 €
Total W/ Discount						€40.00
Total Discount						€0.00
<b>Total</b>						<b>€40.00</b>

[Attachments and Comments](#) [Close](#)

<a href="#">Close</a>	Close budget
<a href="#">Attachments and Comments</a>	View attachments and add/view comments

You can make comments on the budget by clicking the [Attachments and Comments](#) button and then click on the **Comments** tab. Then, you should type in the text box and click the [Save](#) button.

Budget details #39

Attachments
Comments

DS DIANA SANTOS



Parágrafo

Approved

[Save](#)

[Document Details](#) [Close](#)


<a href="#">Attachments and Comments</a>	View attachments and add/view comments
<a href="#">Document Details</a>	Return to budget details

	Save comment
	Delete comment


**Budget details #39**

Attachments Comments


**DIANA SANTOS**

Parágrafo 

**DIANA SANTOS** (diana.santos@idelasdinaicas.com)  
10/03/2024 16:04:32



Aprovo 



**DIANA SANTOS** (diana.santos@idelasdinaicas.com)  
10/03/2024 16:02:06

Aprovo 

**Are you sure you want to continue?**

















This action will be irreversible





 <b>Comment deleted successfully</b> 	Warning message – comment successfully deleted
---	--

## 7 Invoices Module

### A1. Invoices


Document	Date	Serie	Total	
FT FA.24S/174	08/14/2024	24S	€6,352.34	
FT FA.24/37	08/09/2024	24	€928.48	
FT FA.24R/57	07/31/2024	24R	€123.00	
FT FA.24R/56	07/30/2024	24R	€2,374.81	
FT FA.24S/172	07/30/2024	24S	€990.15	
FT FA.24S/173	07/30/2024	24S	€29.52	
FT FA.24R/55	07/26/2024	24R	€233.01	
FT FA.24R/54	07/26/2024	24R	€424.35	
FT FA.24R/53	07/26/2024	24R	€430.50	
FT FA.24R/52	07/26/2024	24R	€233.01	
FT FA.24R/51	07/26/2024	24R	€86.10	
FT FA.24R/50	07/26/2024	24R	€146.91	
FT FA.24S/171	07/26/2024	24S	€29.52	
FT FA.24S/170	07/26/2024	24S	€24.60	
FT FA.24S/169	07/26/2024	24S	€29.52	
FT FA.24S/168	07/26/2024	24S	€24.60	
FT FA.24S/167	07/26/2024	24S	€59.04	
FT FA.24S/166	07/26/2024	24S	€29.52	

To access the "**Invoices generated**" module, you should click on the "**Invoices**" button in the Navbar.

<input type="text" value="Search"/> <input type="text" value="Date (Begin)"/> <input type="text" value="Date (End)"/> <input type="text" value="Serie"/>	
	Refresh data
	Button to expand filter options
<b>Document</b>	
<b>TIN</b>	
<b>Date (Begin)</b>	
<b>Date (End)</b>	
<b>Serie</b>	
	View document
	View credit notes

## B1. Invoices – View credit notes

Credit notes #FT FA.24R/40 ×

Document	Client	TIN	Date	Serie	Total	
NC NC.24R/5	Super Bock Bebidas, S.A	505266202	07/22/2024	24R	-€123.00	

Records per page 50 ▾ 1-1 of 1

**PORTUGAL**

Rua Álvaro Castelões 821

5<sup>th</sup> Floor - Room 5.2

4450-043 Matosinhos

Praça de Alvalade,

No.6 – 1<sup>st</sup> floor left

1700-036 Lisboa

Av. D. João II 374

3<sup>rd</sup> Floor - Room 38

Pólo de Negócios de Braga

4715-275 Braga

itgest.pt

**ANGOLA**

Belas Business Park

Edifício Bengo, 6<sup>th</sup> Floor - Room 601

Talatona