Vergado Mobile App – User Manual

Welcome to Vergado — your one-stop app for everything work-related. This manual will guide you through each part of the app so you can get the most out of your experience.

Vergado

Contents

Chapter 1: Getting Started

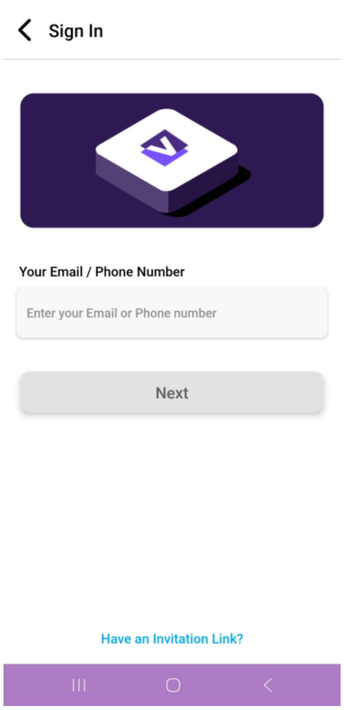
Step 1: Download the App

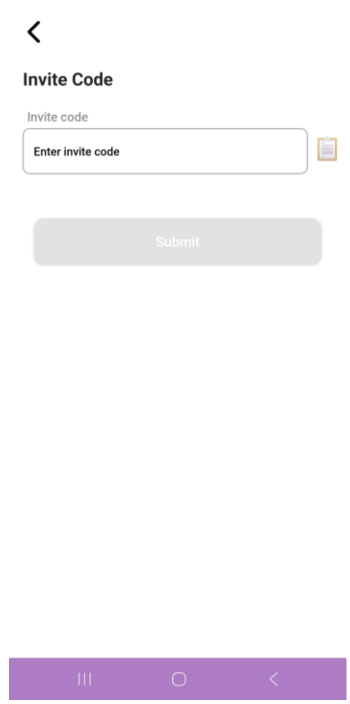
Search for **"Vergado"** on the [Google Play Store] (for Android) or the [Apple App Store] (for iPhone) and download the app. It's lightweight and installs in seconds.

Step 2: Self Registration

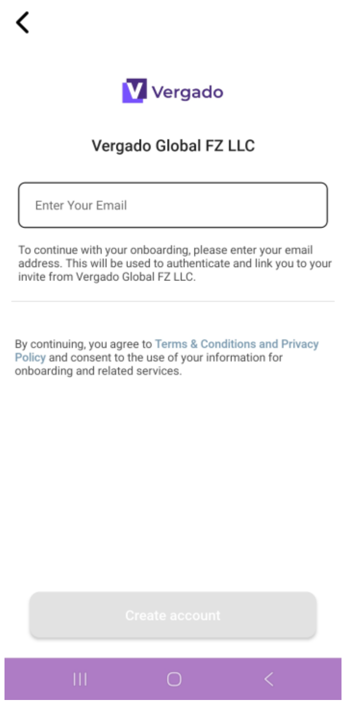
Some organizations may enable **self-registration** for new users. Here's how it works:

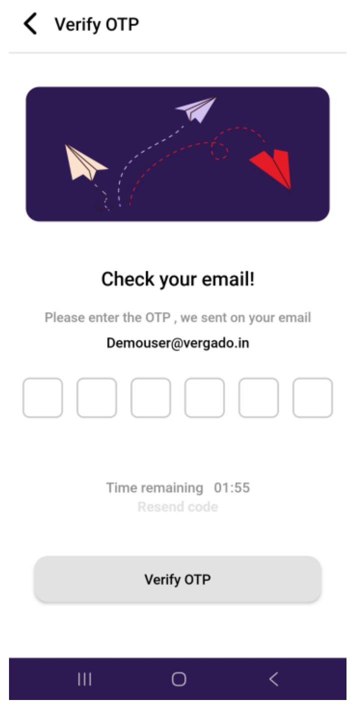
- You'll receive a registration link via email.
  - If you already have the Vergado app installed, the link opens the app directly.
  - If not, it redirects you to the Play Store/App Store to download the app first.
- Registration Options
  - When the app opens, enter your **work email** directly, OR
  - Tap **"Have an invitation link?"** and paste the link from your email and enter your email.



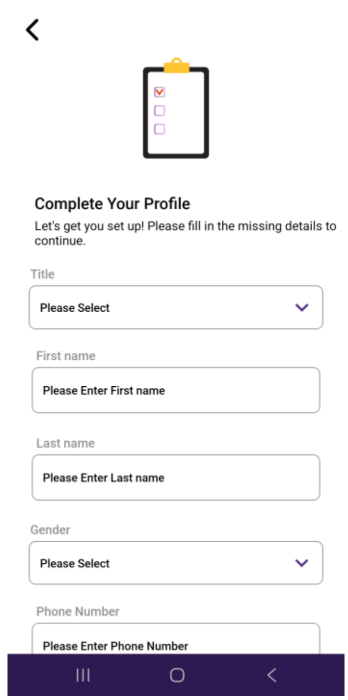


- You'll then receive an OTP on your email for validation.

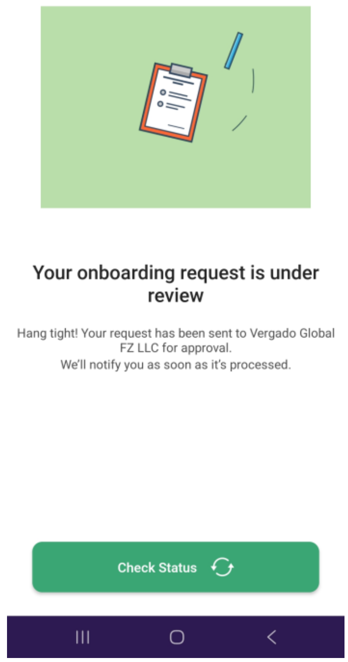




- After OTP verification, you'll land on the Complete Profile page. Here, fill in your personal details, contact information, and any mandatory fields set by your company.



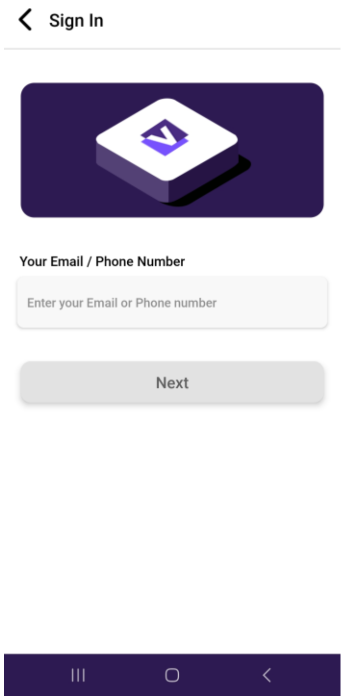
- When you hit Submit:
    - Your details may be sent for company admin approval (depending on your organization’s settings).
    - You can tap Check Status anytime to track the approval stage.

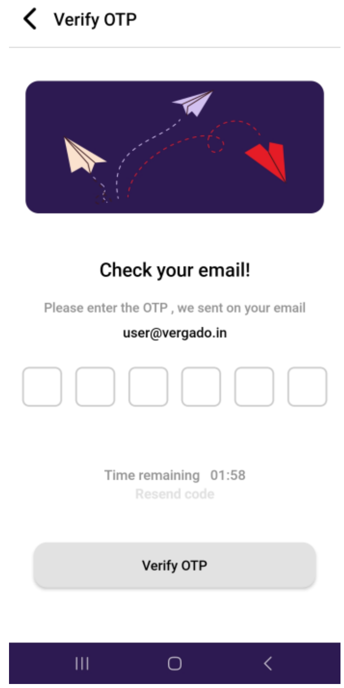


- Once your registration is approved and onboarding is done, you can proceed with the normal sign-in flow (password, PIN, or biometrics).

🔐 Step 3: Login via Email

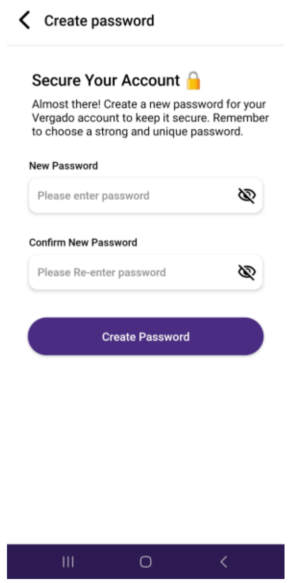
- Enter your **work email ID** (the one registered with your organization).
- You’ll receive a **One-Time Password (OTP)** on that email.
- The OTP is valid for **2 minutes** — if it expires, tap **“Resend OTP.”**
- Once verified, you’re in.





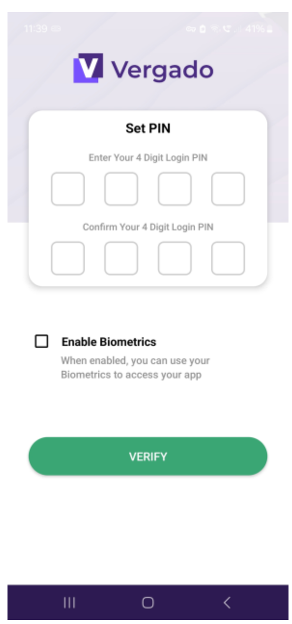
🔑 Step 4: Create a Password

Once you’re in, you’ll be asked to create a **password**. This will be used for future logins.



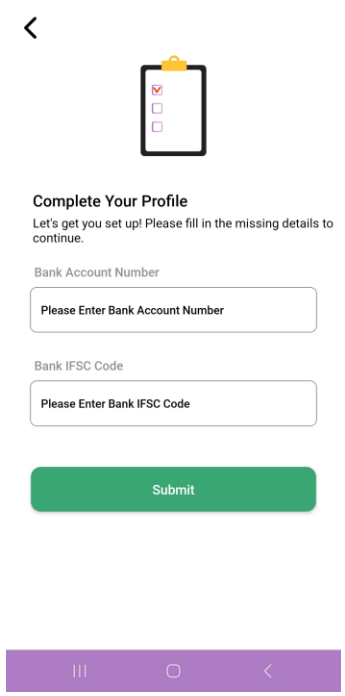
🔓 Step 5: Set App PIN & Biometrics

- Next, set a **4-digit PIN** — this adds an extra layer of security and makes logging in faster.
- You can also **enable biometrics** (like Face ID or Fingerprint) depending on your phone settings. If enabled, you'll be able to log in with just a touch or a glance.



Step 6: Fill Onboarding Form (If Applicable)

If your company has enabled onboarding, you'll be prompted to fill in a form with your basic info — like personal details, PAN, bank info, etc.
You must **complete and submit** this before proceeding to the rest of the app.



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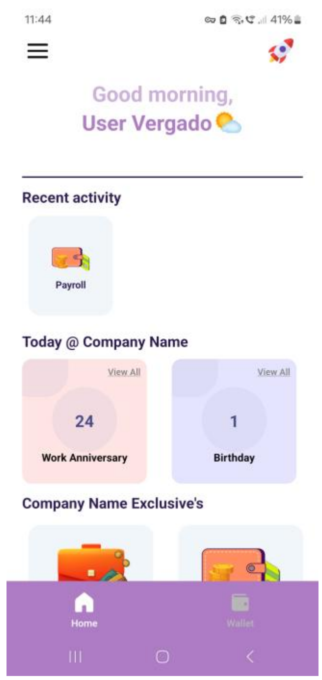
Chapter 2: Main Dashboard

Once you're through setup, you'll land on the Main Dashboard — your hub for all app activity.

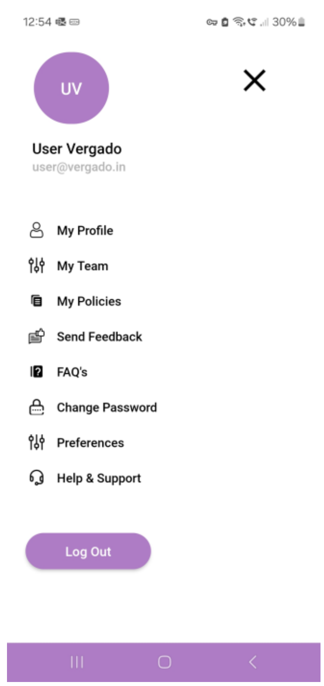
🎉 Today @ Your Company

At the top, you'll see if anyone in your organization is celebrating a **birthday or work anniversary**.
If nothing is listed, that just means no events for the day.



Sidebar Navigation

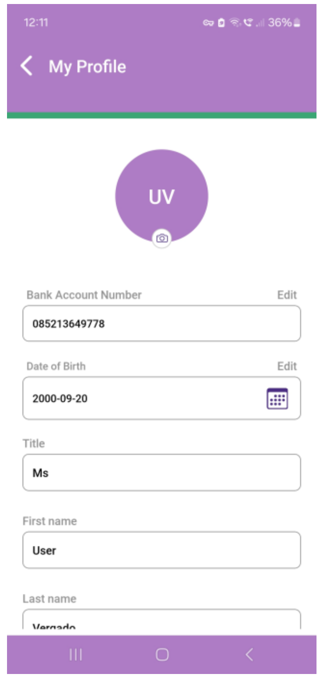
Tap the ☰ **menu icon (top-left)** to open the sidebar. Here's what each option does:



👤 My Profile

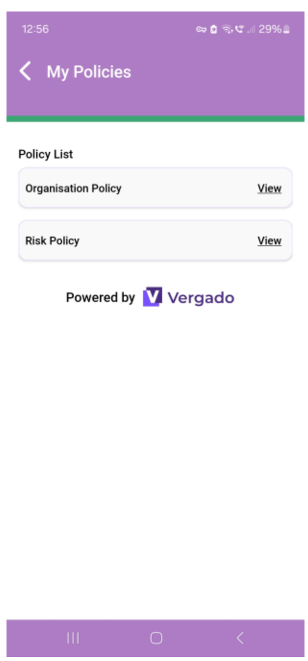
- View all your registered details — name, phone number, email, designation, etc.
- Fields that are editable have an **Edit** button — tap it, make changes, and save.
- Update your Vergado Profile picture by clicking on the profile icon at top.
- Some fields may need admin approval before they're updated.

Vergado



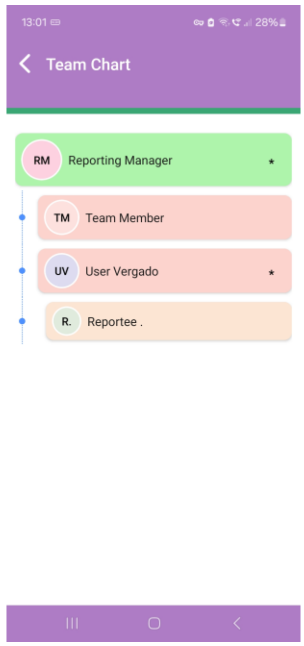
My Policies

- View all the policies applicable to you as set by your company.



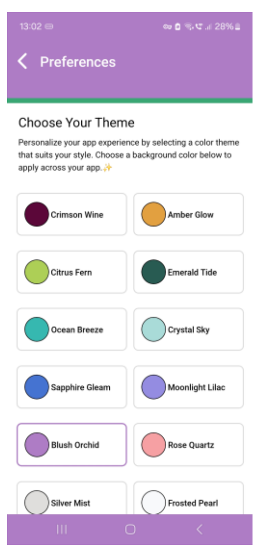
My Team

- See your **org structure** clearly — who reports to you, who your manager is, and who your peers are.
- Useful for understanding your reporting line and managing approvals.



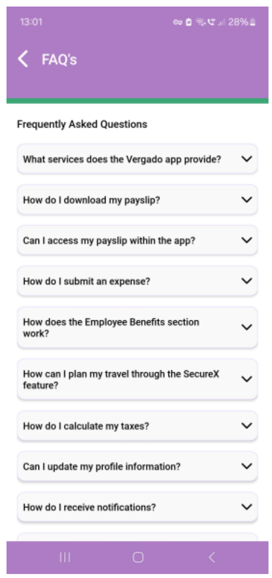
Preferences

- Customize the app's **theme and color mode**. Light or dark, your call.



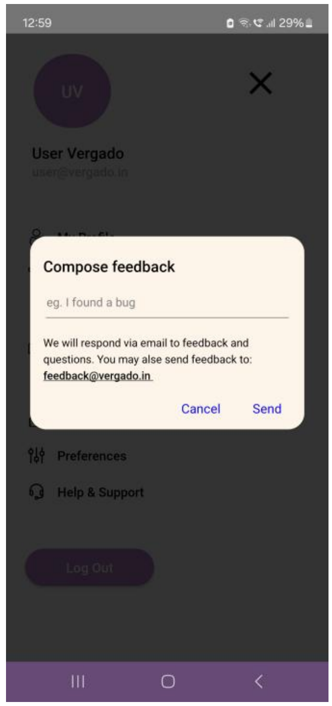
❓ FAQs

- Got questions? Find quick answers here for common features and how-tos.
- This manual covers everything, but FAQs are your fast lane.



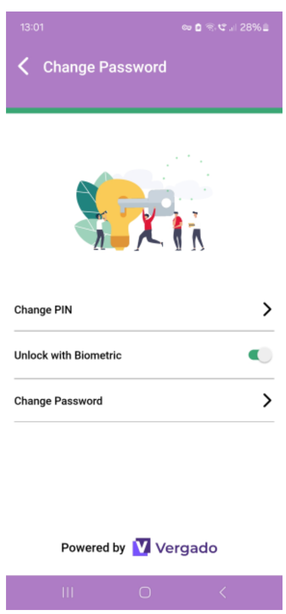
Send Feedback

- Think something’s missing? Spotted a bug?
- Use this to send your feedback directly to the Vergado team. We read and act on every suggestion.



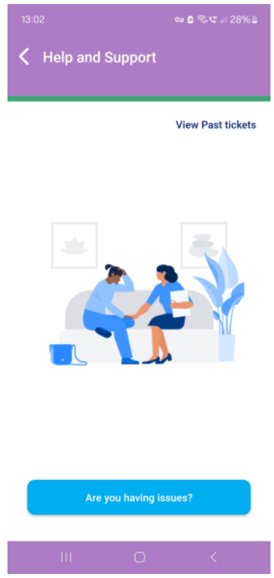
Change Password / PIN / Biometrics

- Forgot your password? Want to update your PIN?
- This section lets you reset your password, change your app PIN, or enable/disable biometric login.



Help & Support

- Facing issues? Tap here to connect with your **organization’s support team**.

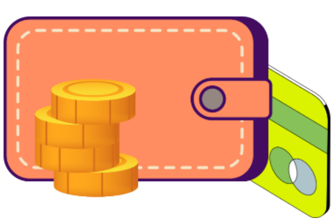


Log Out

- Done for the day? Tap to securely log out of the app.

Company Exclusives

Below the “Today @ Your Company” section, you’ll find **Your Company Exclusives** — a set of tiles giving access to various features.

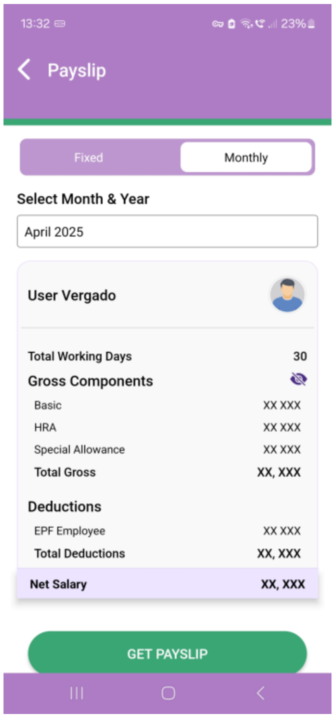


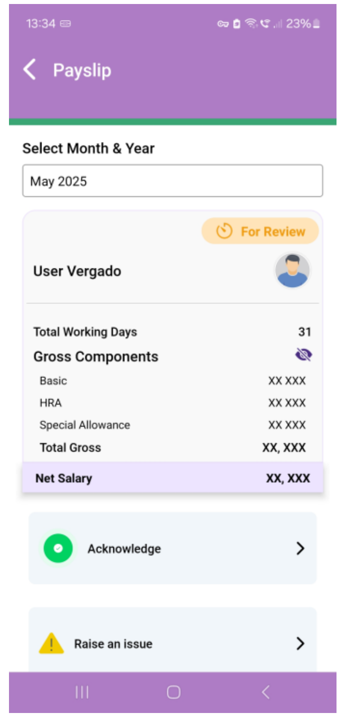
Payroll

Payslip

- **Fixed Section**: See your **fixed salary (CTC)** and structure.

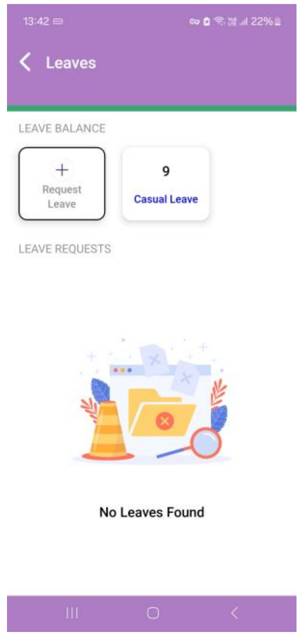
- **Monthly Section**: Choose a month/year to view that month's **payslip**.
  - Tap the **eye icon** to reveal or hide actual salary figures.
  - Tap **Get Payslip** and it will be sent to your registered email.
- **For Review Badge**: If a payslip is marked **"For Review,"** it means it's pending your acknowledgment.
  - Tap **Acknowledge** if everything's correct.
  - Tap **Raise an Issue** if there are errors — your admin will review and resolve it.





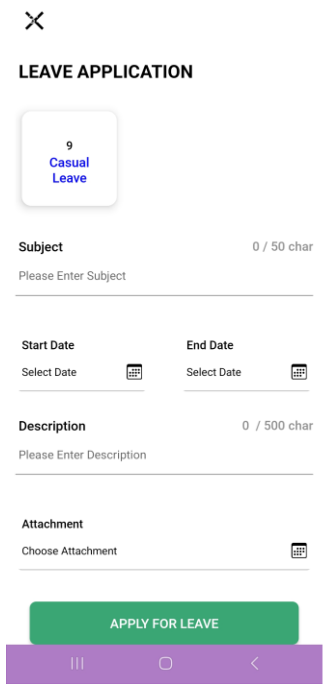
🌴 Leave Management

- View all the **leave types** (CL, SL, EL, etc.) available to you along with **current balances**.
- Tap on any leave to see how balances are credited, carried forward, or deducted.



📝 Add Request

- Tap **Add Request** to apply for leave.
- Fill in:
  - **Leave type**
  - **Subject**
  - **Reason**
  - **Start & end dates**
  - **Update Shifts for days, if opting for Half Day Leave**
  - **Attachment (optional)** — like a doctor's note or travel tickets
- Tap **Submit** to send for approval.

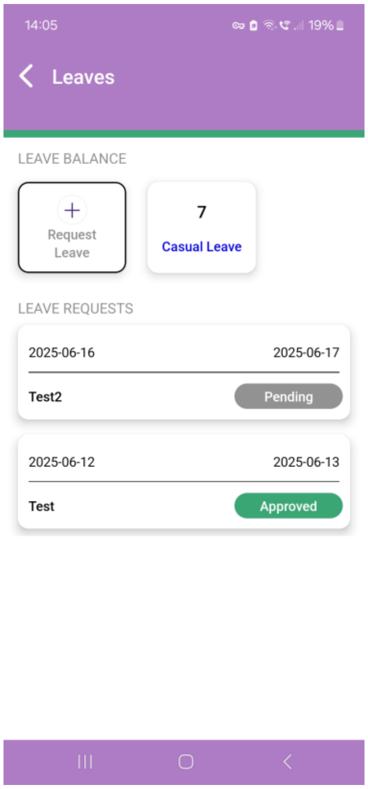


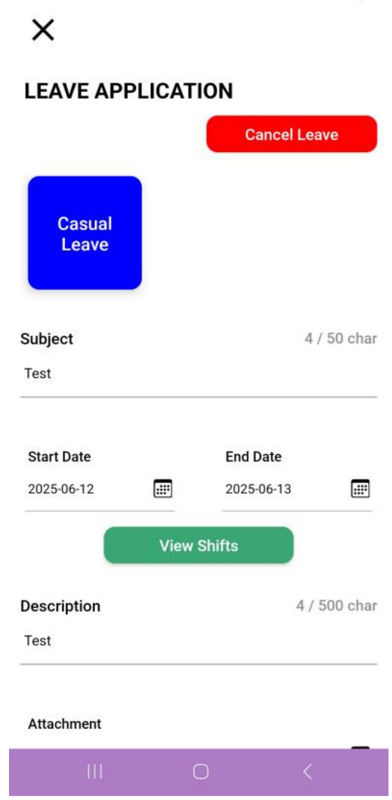
📂 Leave Requests

- View all past and current leave requests with their **statuses** (Pending, Approved, Rejected).
- Tap any request to view details.

🔄 Cancel Leave

- Leaves can be **cancelled** if your salary hasn't been generated for the month in which the leave was taken.



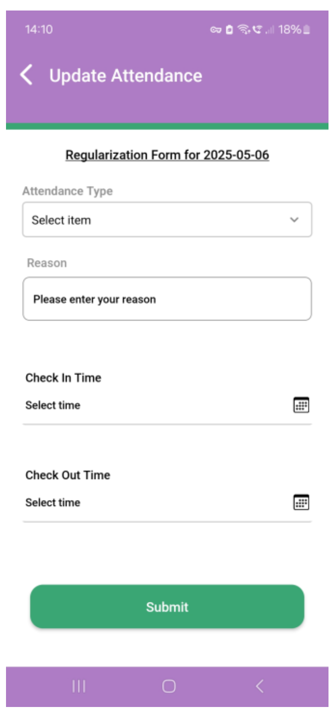


🕒 Attendance

- Default view shows the **current month's attendance** — present days, WFH, holidays, etc.
- Use the **month/year filter** to view older records.

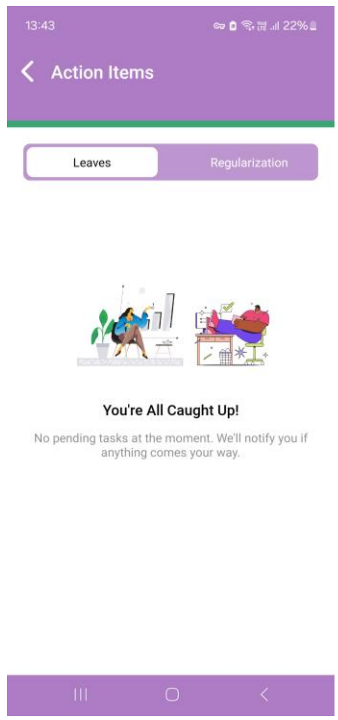
🛠 Regularization

- Tap on a date to **raise an attendance correction** request.
- You can only raise this if salary hasn't been generated for that period.



Action Items

- Got approvals pending your action?
- This section lists all **leave** or **regularization requests** assigned to you.
- Tap into any request, view details, and take **Approve / Reject / Send Back** action as needed.



Expense Management

Expense tracking and reimbursement made smart. In this section of the Vergado app, you can submit expenses, manage drafts, track past submissions, and handle project-linked expenses — all in one place.

Add Expense

This is where your expense journey begins.

1. **Transaction Mapping (if applicable)**
    - If you've made any transactions via your **Vergado card**, a **Transaction Mapping** screen appears.
    - Tap on the transaction you want to raise the expense for — this ensures your claim is tied to an actual spend.
    - *If this screen doesn't appear, no worries — it just means you don't have any unclaimed transactions.*
2. **Upload Bill Photo**
    - You'll be prompted to **upload your bill**.
    - You can either:
        - **Take a photo** using your phone camera
        - **Upload** from gallery or file manager
3. **Fill Expense Form**
    - A form opens up with certain fields **auto-filled** (based on the transaction and the bill photo if scanned).

- You'll need to fill in all required fields like:
  - **Expense Type**
  - **Merchant/Place**
  - **Date of Expense**
  - **Description**

4. **Project-Specific Expense?**
   - Toggle **"Expense for a Project"** to **Yes** if this expense is project-related.
   - Enter the **Project Code** — this links the expense to the appropriate project in your system.
5. **Amount and Currency**
   - Enter the **amount spent**.
   - Select the **currency** (based on where the transaction took place).
   - *If the currency isn't listed, contact your company admin to enable it.*
6. **Choose What You Want to Do Next:**
   - 📝 **Save as Draft**:
     - Your expense gets saved locally — not submitted.
     - Find it later in the **Drafts > Expense Drafts** section to make edits or submit.
   - 📋 **Add to Report**:
     - You'll be asked:
       - Add to a **New Report** (you'll create a fresh report)
       - Add to an **Existing Report** (choose from your saved reports)
     - These reports can be submitted in bulk for reimbursement.
   - 🚀 **Submit**:
     - Sends your expense for **direct approval** to your company approver/admin.

📁 Drafts

Saved it for later? This is your area.

There are **two tabs** here:

🧾 Expense Drafts

- View all **individual expenses** saved as drafts.
- Tap on any draft to:
  - **Edit** the fields
  - **Save** your changes again
  - Or **Submit** directly for approval
- You can also **select multiple drafts** and click **“Add to Report.”**
  - Choose to create a **new report** or attach to an **existing report**.

📑 Draft Reports

- View all **expense reports** that are created but **not yet submitted**.
- Tap on a report to:
  - View included expenses
  - Edit any expense inside
  - Save updates
- When ready, tap **Submit** at the bottom — this locks the report and sends it for approval.
- ⚠️ *Note: Once submitted, you can’t add new expenses to that report.*

📜 View Past Expenses

Want to see your claim history? This section helps you track and review everything.

📌 My Expenses

- All your **submitted individual expenses** are listed here.
- Tap on any expense to view details.
- If you notice an error or have a concern, tap **"Raise an Issue"** and describe the problem — your company admin will be notified.

📋 My Reports

- All your **submitted reports** are shown here.
- Tap on a report to expand and view the **included expenses**.
- Just like above, you can **raise an issue** on any individual expense inside a report.

🧩 Projects

If your organization uses project-based accounting, this section is for you.

- View a list of all **active projects** assigned to you.
- Tap a project to:
  - See project code, name, description, owner, and other details
  - **Send a message** to the Project Owner if you have questions or clarifications

⚡ Action Items

All pending actions related to expenses or reports will show here. This section has **two tabs**:

📬 My Expenses

- These are expenses that were **sent back to you** by an approver.
- Reasons may include missing data, wrong category, unclear bill photo, etc.
- Tap the expense, make changes, and **resubmit**.

✅ For Review

- If you are an approver (like a manager or finance reviewer), all incoming **expense/report approval requests** are listed here.
- Tap any item, review details, and take one of these actions:
  - **Approve**
  - **Reject**
  - **Send Back** with comments

✅ Summary Tips

- Use **Save as Draft** if you need time to gather bills or details.
- **Add to Report** is useful when submitting multiple related expenses at once.
- Track everything in **My Expenses** and **My Reports**.
- For recurring project-related travel or spends, always toggle **Project Mode**.

✨ Pro Tips

- **Enable notifications** to get real-time alerts.
- Keep your **app updated** to get the latest features and bug fixes.