USER GUIDE · VERSION 1

Staff memo

Company memos and procedures (SOPs) in one place, with a record of who has read and confirmed each one. It is also the Home screen that opens your other apps.

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5. Confirm you have read a memo
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What it is for

For: Everyone

Staff memo is your company's staff portal. It does three jobs:

- **Memo Board**: announcements, notices and guidelines for staff. Head office can ask staff to confirm they have read a memo, and sees who has.
- **SOPs**: your company's standard operating procedures (SOPs, the written steps for a job, such as opening an outlet). Each one has a code, a version number and a date it takes effect.
- **Your apps**: one Home screen for the other apps your company uses. You sign in once here and open each app from its tile without signing in again.

Who uses it

- **Staff** read memos, confirm the ones that ask for it, look up procedures and open their apps.
- **Administrators** write memos, publish procedures, answer requests to read a procedure, and set up the apps on Home. What each administrator can do depends on their role. The roles that come with it are **Hr**, **Sop Approver** and **Super Admin**.

What it needs from other modules

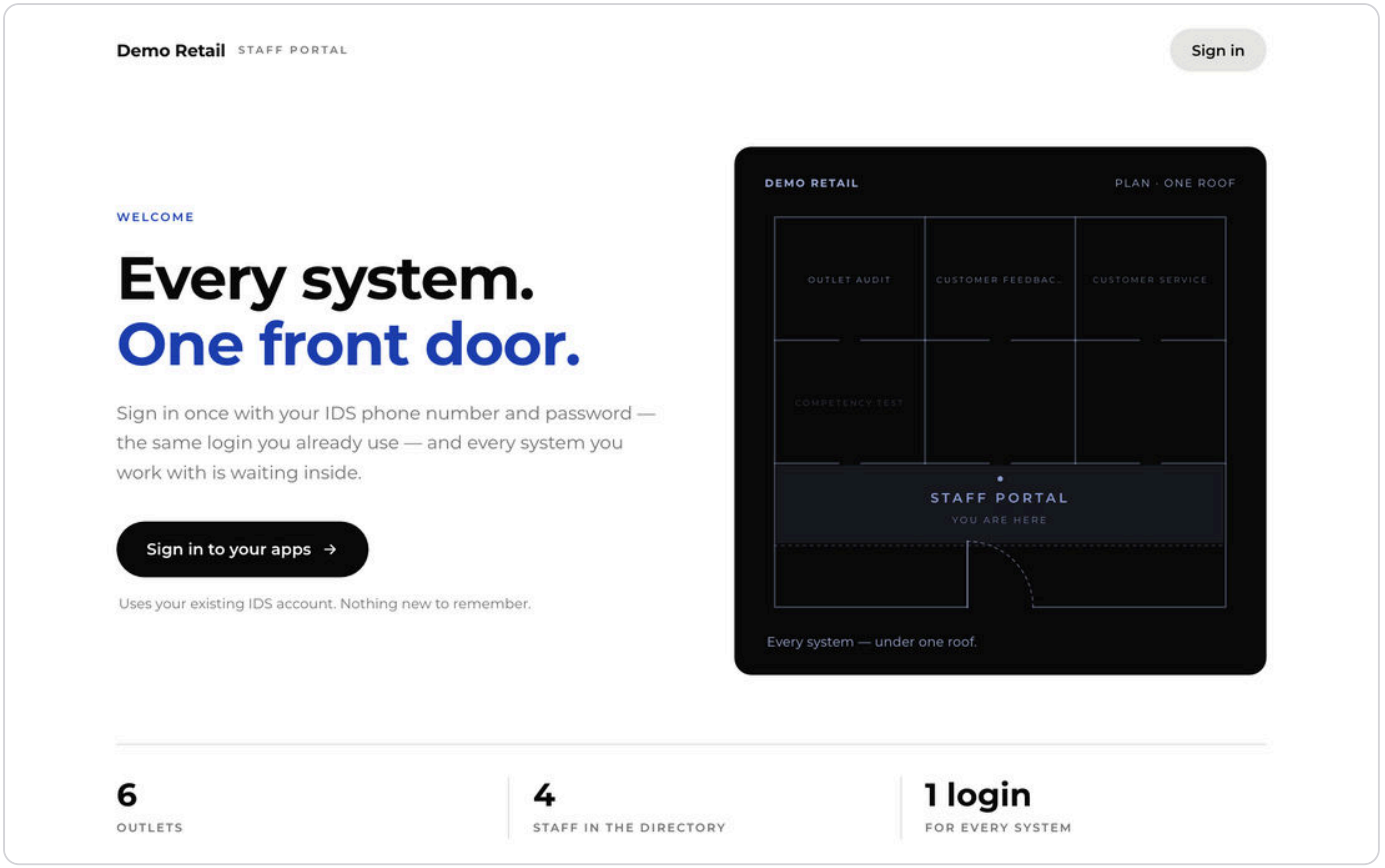
- Sign-in uses your company's shared sign-in service (phone number and password).
- Staff names, outlets, departments and staff grades come from Master data. Memos and procedures meant for one group (outlet staff, a department, a staff grade) only reach a person who is in Master data with the same phone number they sign in with.
- Each app on Home must be connected by an administrator before staff can open it from here.

STAFF MEMO

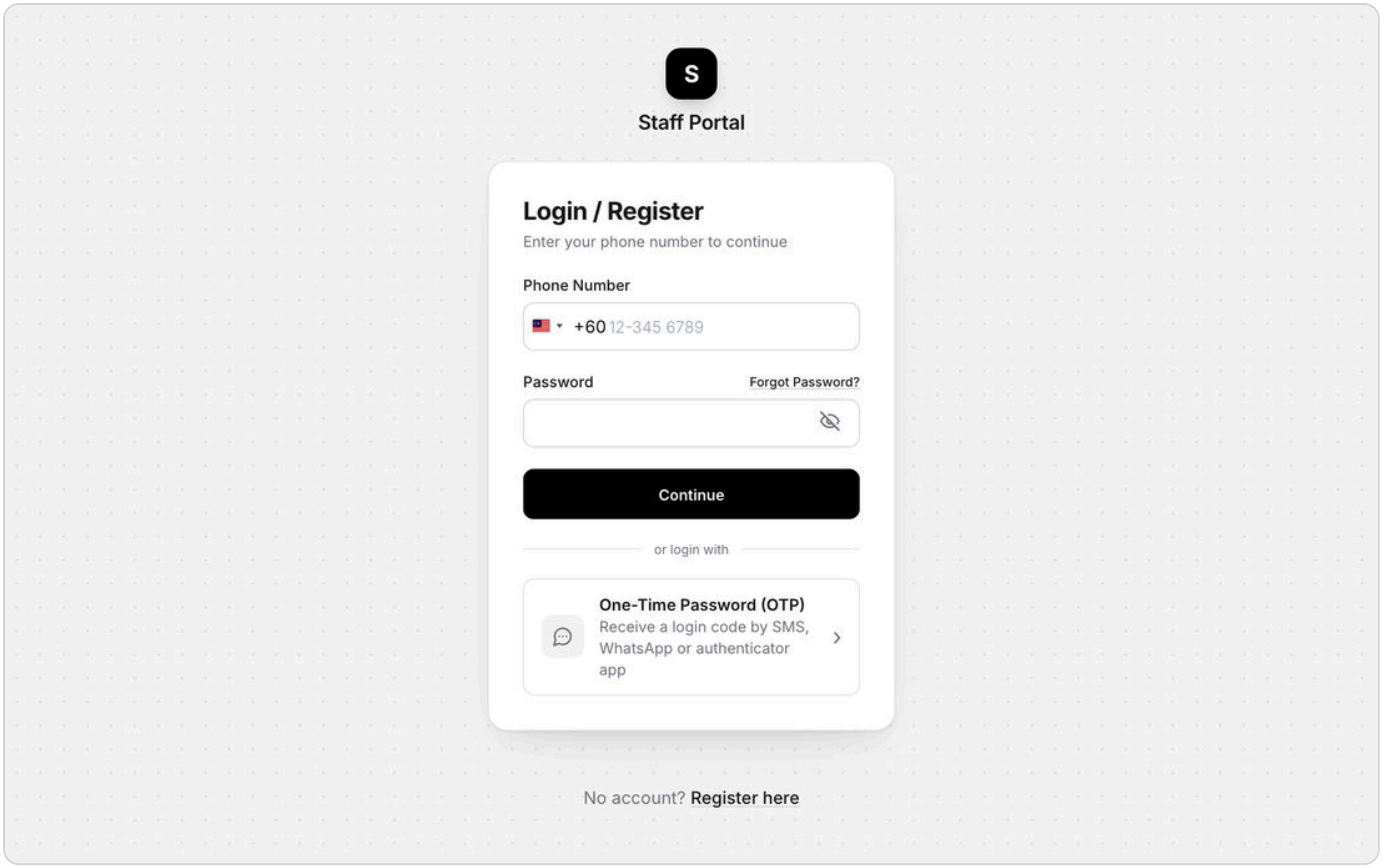
Sign in

For: Everyone

1. Open your company's portal address. The front page shows your company name and how many outlets and staff are in the directory.
2. Press **Sign in to your apps** (or **Sign in** at the top right).



3. Enter your **Phone Number**. The country code (+60 for Malaysia) is already filled in. Change it with the flag if you need to.
4. Enter your **Password** and press **Continue**.



No password, or forgot it?

- Under **or login with**, choose **One-Time Password (OTP)** to get a sign-in code by SMS, WhatsApp or an authenticator app.
- Press **Forgot Password?** above the password box to set a new one.

It is the same phone number and password for every app on Home.

No account? Ask HR or IT to set one up. Use the phone number HR has on record for you, so the portal can match you to your outlet and department.

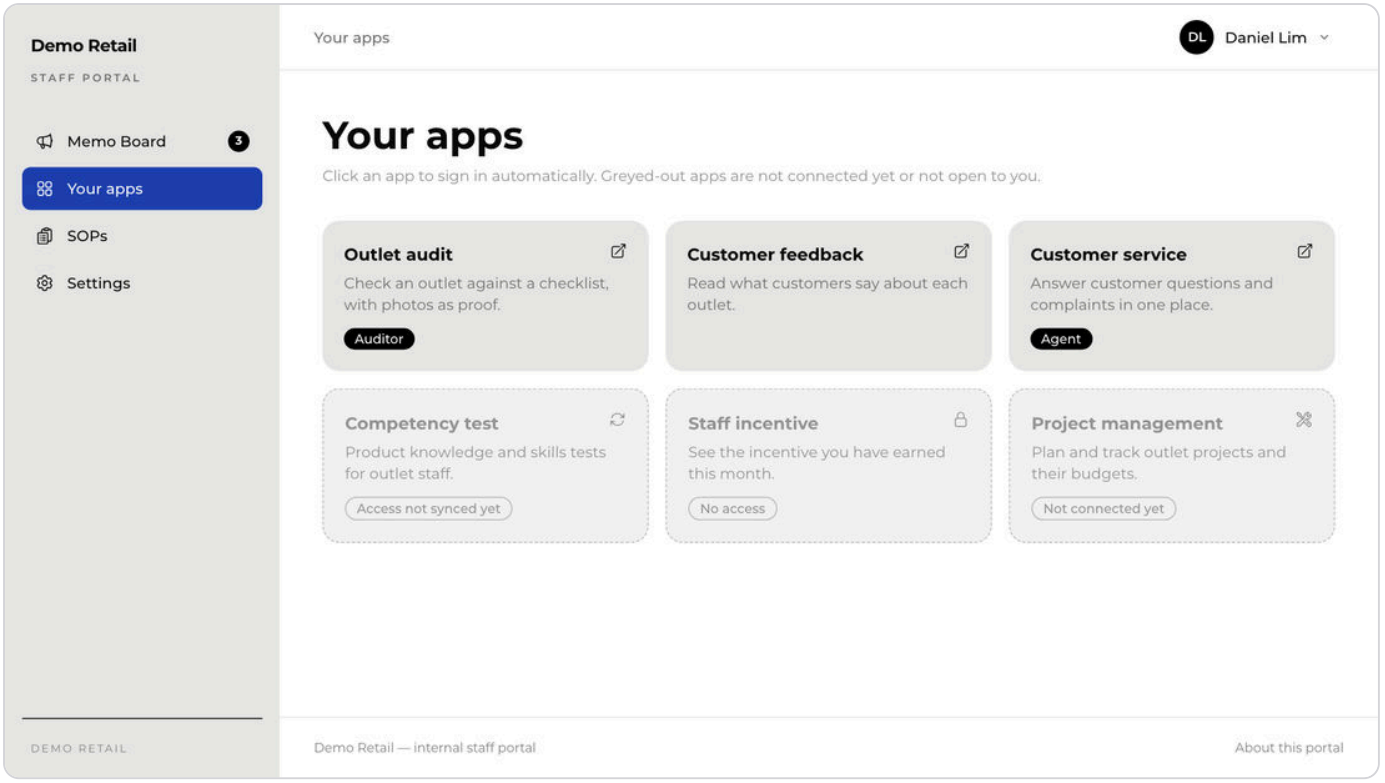
To sign out, press your name at the top right and choose **Sign out**.

STAFF MEMO

Open your apps

For: Staff

1. Press **Your apps** in the menu on the left.
2. Press a tile. The app opens in a new browser tab, already signed in.



The small dark label on a tile, for example **Auditor** or **Agent**, is your role inside that app.

Why is a tile grey? Greyed-out tiles cannot be opened. The label at the bottom says why:

Label	What it means
Access not synced yet	The app has not yet told the portal whether you may use it. The portal checks each time you sign in and again every night at 2 am. If it has not changed by the next day, ask your administrator.
No access	Your company has the app, but you have not been given access to it. Ask your manager.
Not connected yet	The app is listed but cannot be opened from here yet. Your administrator is setting it up.

If a tile says **roles may be outdated**, your role in that app has not been checked for more than a day. You can still open it.

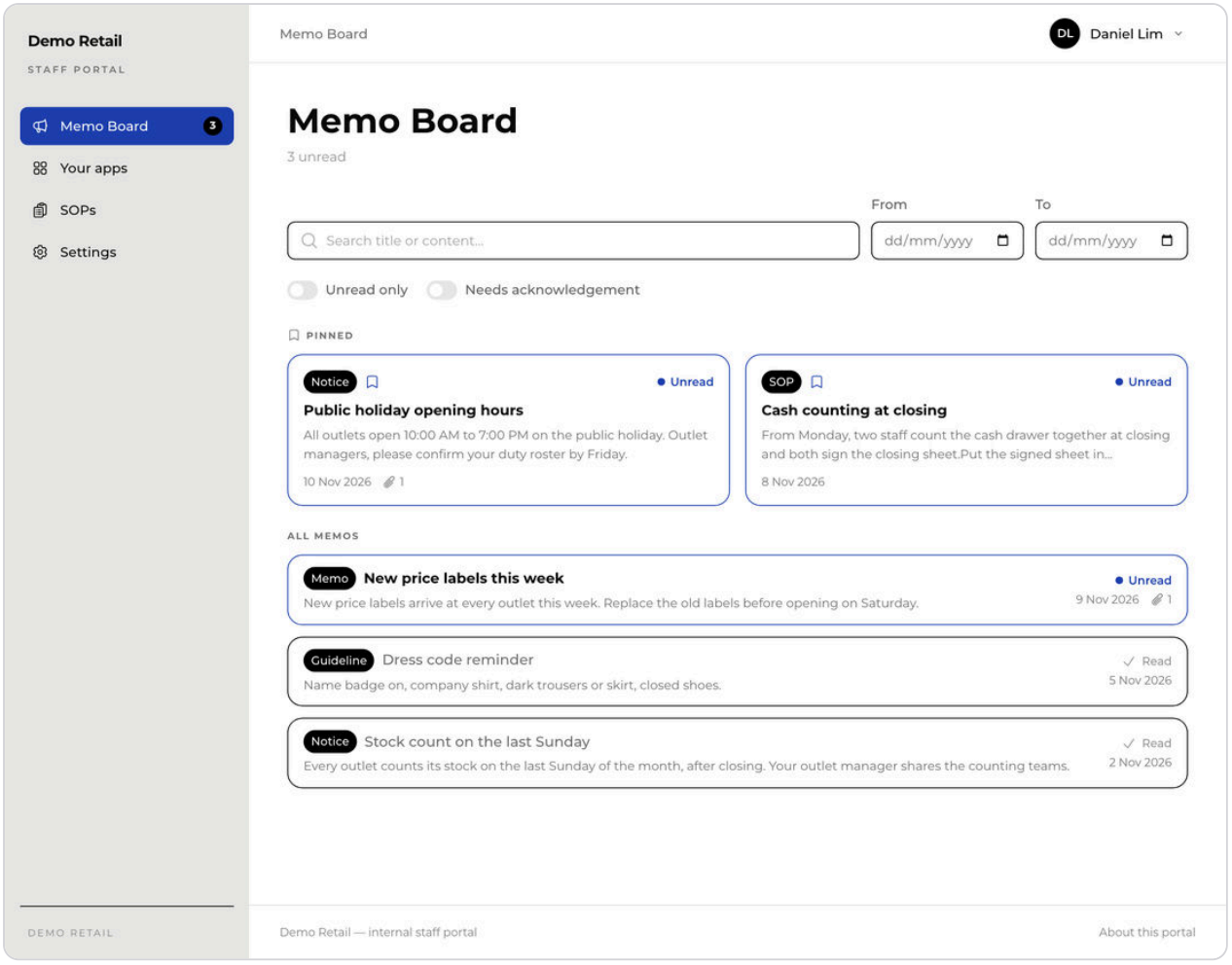
The menu on the left also has **Memo Board**, **SOPs** and **Settings**. In **Settings** you can change your name, your email address and whether the screen is **Light**, **Dark** or follows your device (**System**).

STAFF MEMO

Read memos

For: Staff

1. Press **Memo Board** in the menu on the left. The number next to it is how many memos you have not opened yet.
2. Memos under **Pinned** stay at the top. Below them, **All memos** are listed newest first.
3. Press a memo to read it.



On each memo:

- The black label is its kind: **Memo**, **SOP**, **Guideline** or **Notice**.
- **Unread** in blue means you have not opened it yet. **Read** means you have.
- A paper clip and a number shows how many files are attached.

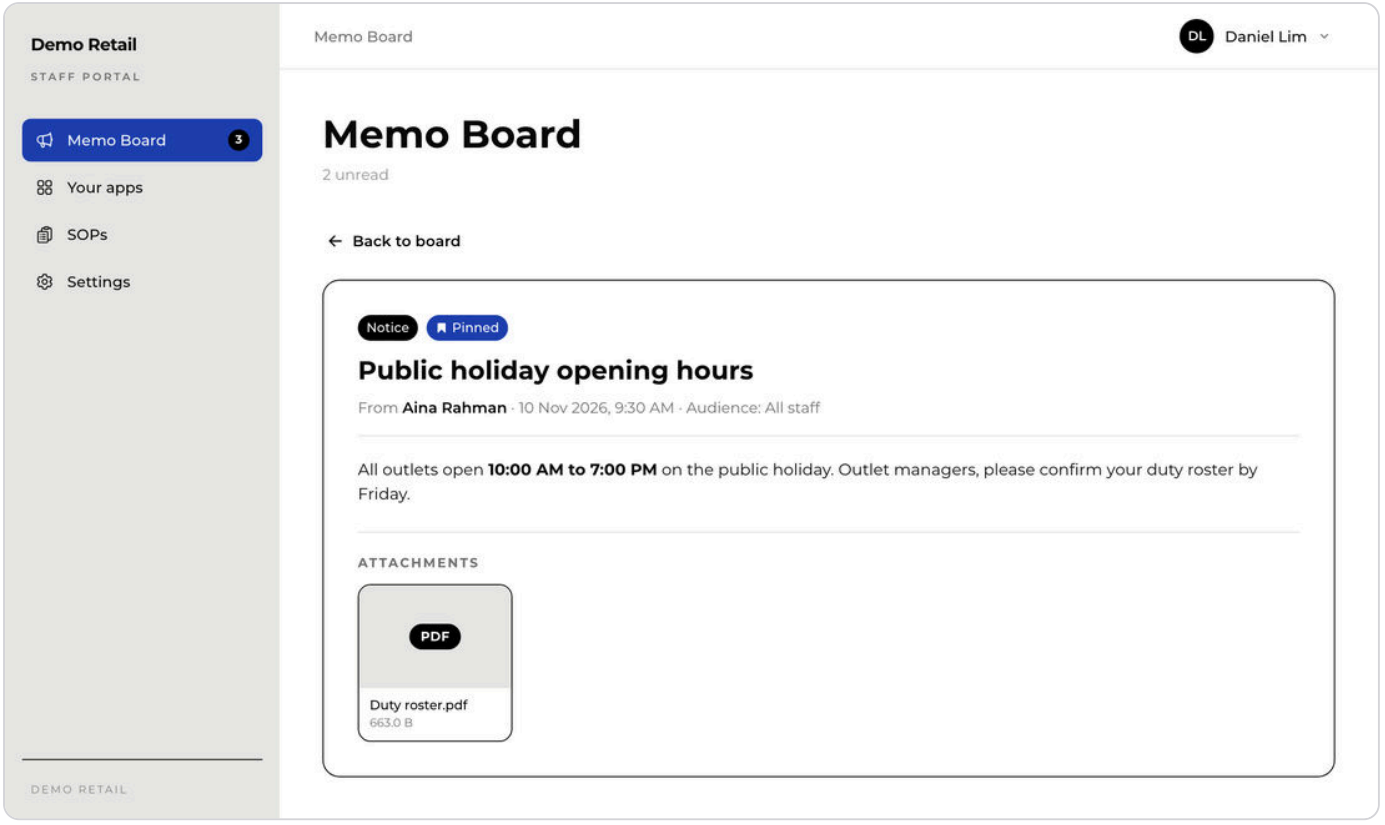
Find a memo

- Type in **Search title or content...**.
- Pick dates in **From** and **To**.

- Switch on **Unread only** to hide what you have read.
- Switch on **Needs acknowledgement** to see memos still waiting for your confirmation.
- Press **Clear** to remove the filters.

Open a memo

The memo shows who sent it, when, and who it is for (**Audience**). Files are listed under **Attachments**. Press a file to look at it or download it. Press **Back to board** to return.



You only see memos meant for you. Where you work (an outlet or head office), your department and your staff grade decide which ones.

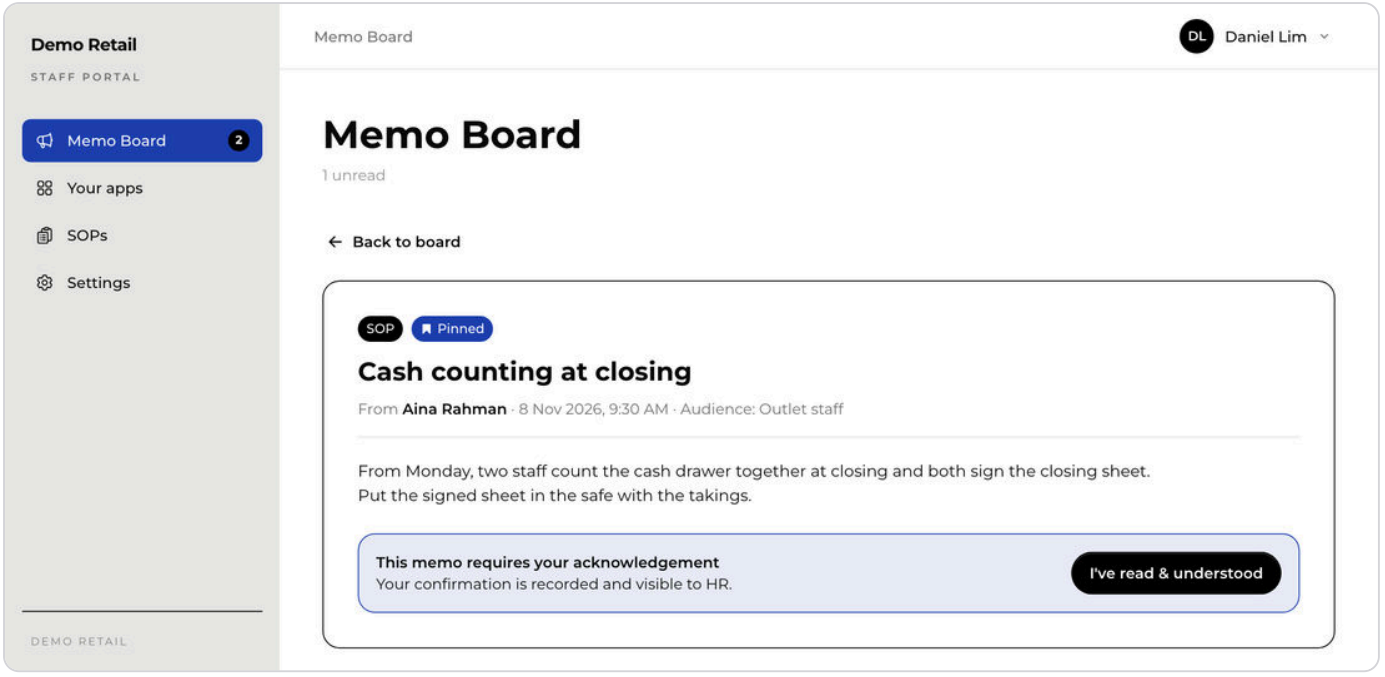
STAFF MEMO

Confirm you have read a memo

For: Staff

Some memos ask you to confirm that you have read them. HR sees who has confirmed and who has not.

1. Open the memo on the **Memo Board**.
2. Read it to the end.
3. Press **I've read & understood** in the box at the bottom.



The box changes to **Acknowledged** with the date and time. You cannot undo it.

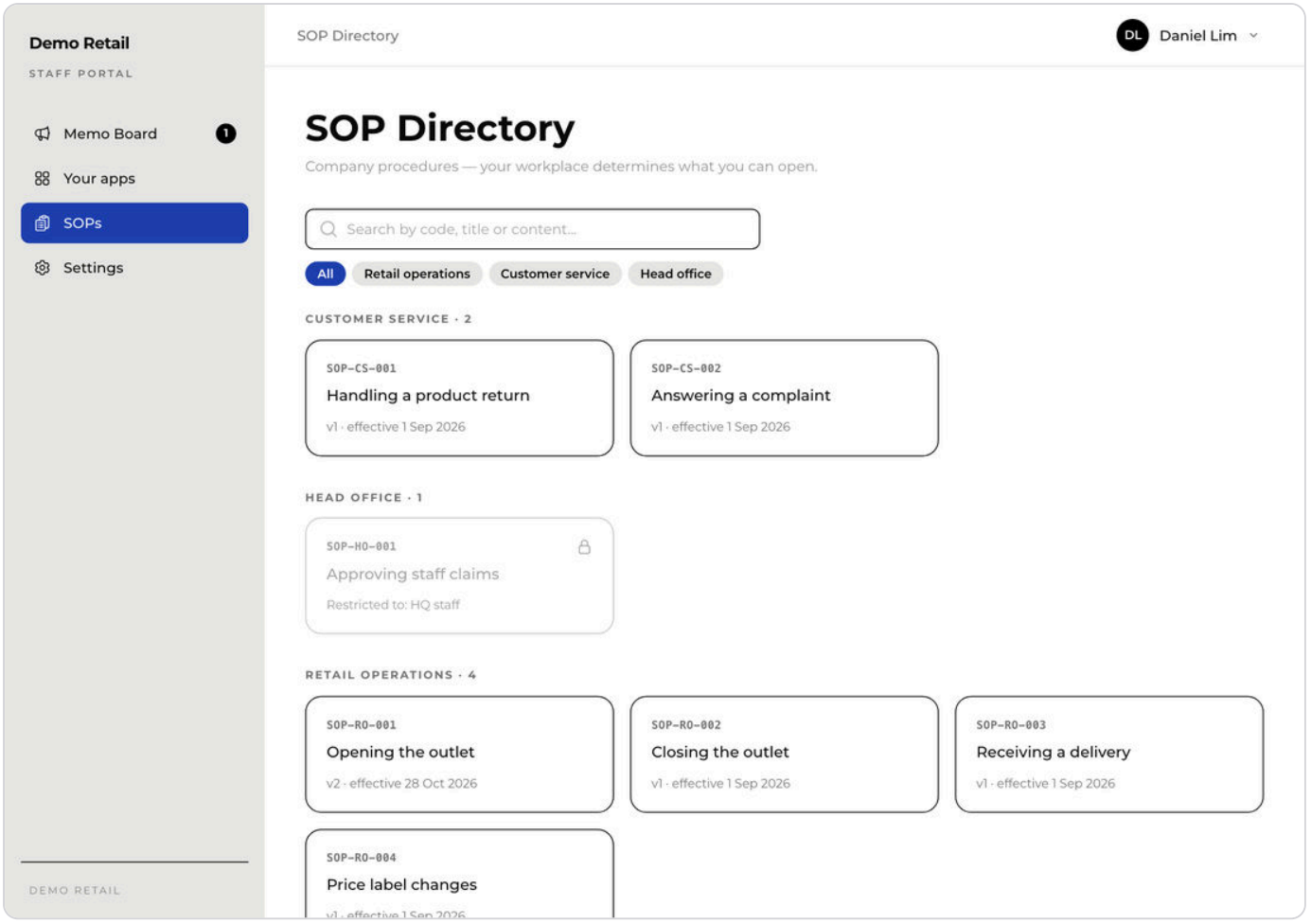
To find every memo still waiting for you, switch on **Needs acknowledgement** on the board.

STAFF MEMO

Find a procedure

For: Staff

1. Press **SOPs** in the menu on the left. The **SOP Directory** opens.
2. Type a code, title or word from the text into **Search by code, title or content…**, or press a category button such as **Retail operations**. Press **All** to see every category again.
3. Press a procedure to open it.



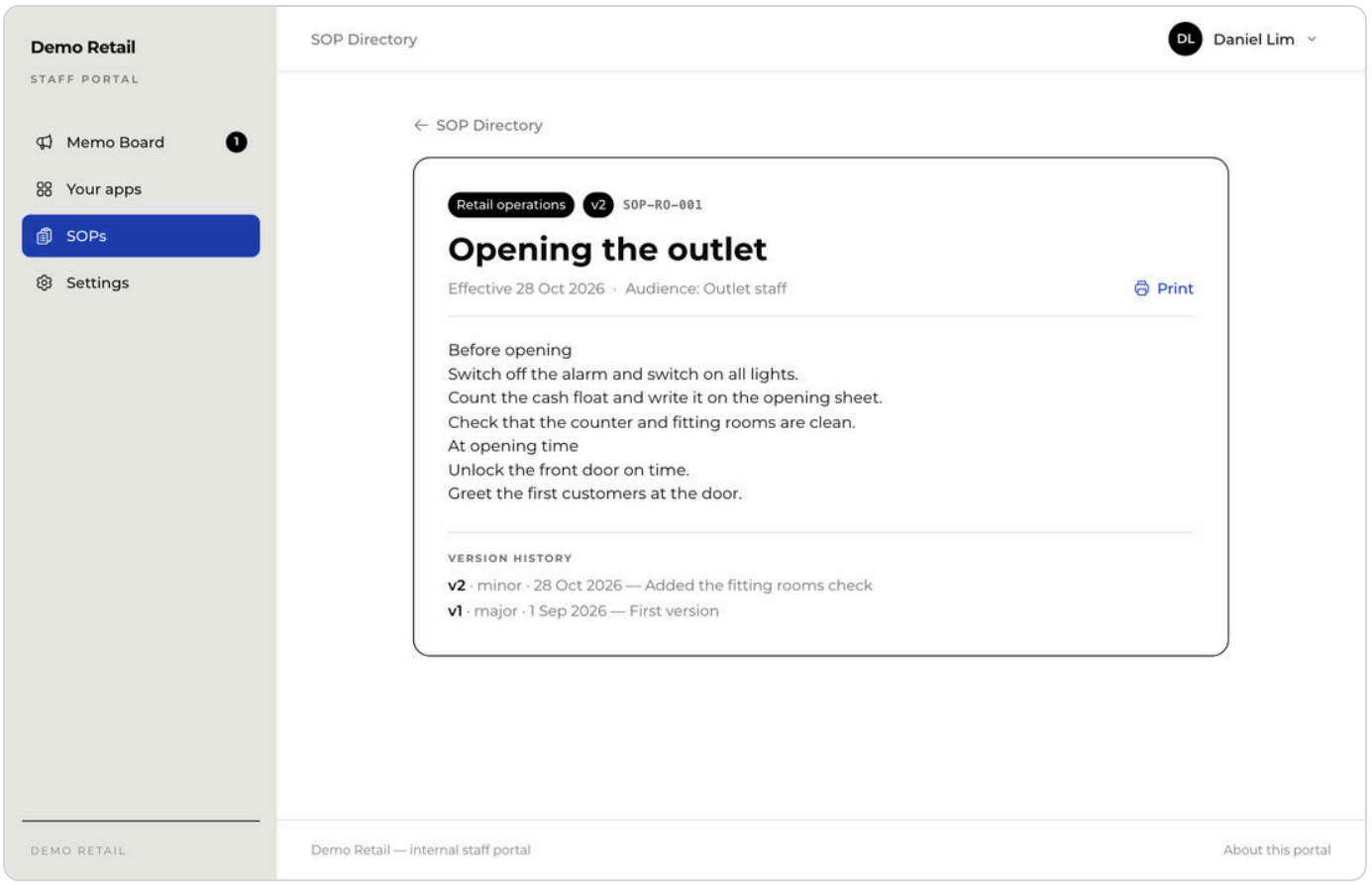
Each card shows the code (for example **SOP-RO-001**), the title, the version (**v2**) and the date it took effect.

A lock and **Restricted to: …** means the procedure is meant for another group, for example head office staff. See *Ask to read a locked procedure*.

Inside a procedure

- The top shows the category, the version, the code, the date it takes effect and who it is for.

- Press **Print** for a paper copy. If the procedure is a scanned document, the button is **Open PDF** instead.
- **Version history** at the bottom lists each version and what changed.



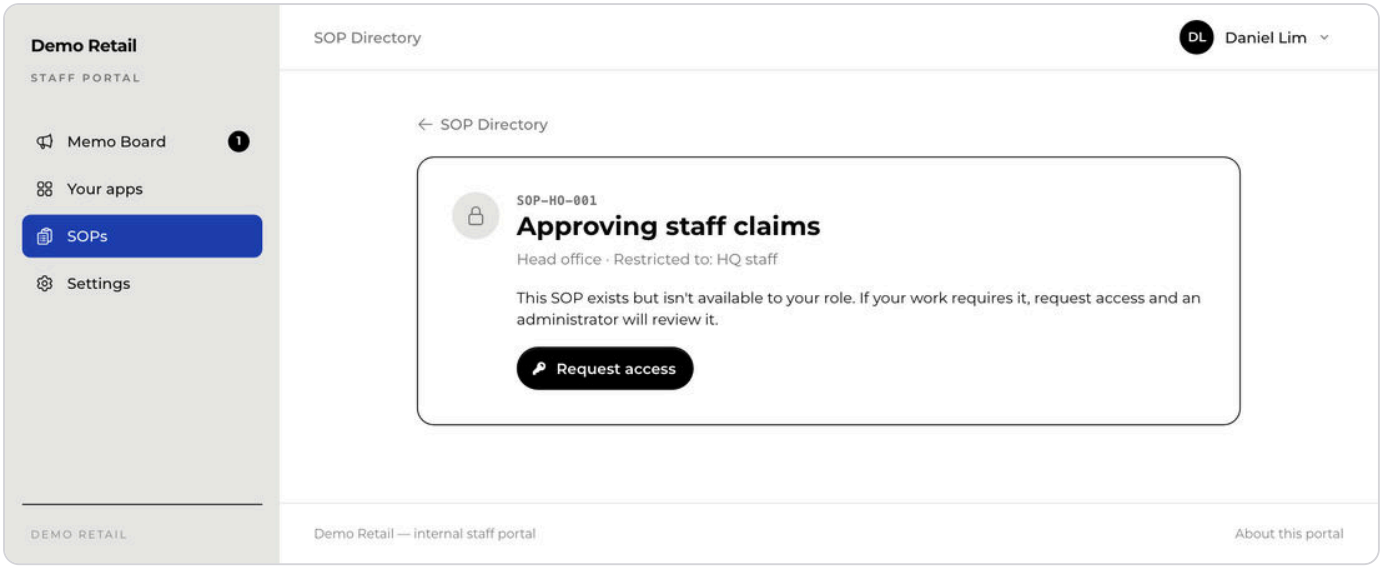
STAFF MEMO

Ask to read a locked procedure

For: Staff

Everyone can see the title of every procedure. Only the group it is meant for can open it. If your work needs a locked one:

1. Open it from the **SOP Directory**. You see its code, its title and who it is meant for.
2. Press **Request access**.



The button changes to **Request pending**. An administrator approves or refuses it, and you get an email with the answer if your account has an email address. Once approved, the procedure opens for you like any other.

STAFF MEMO

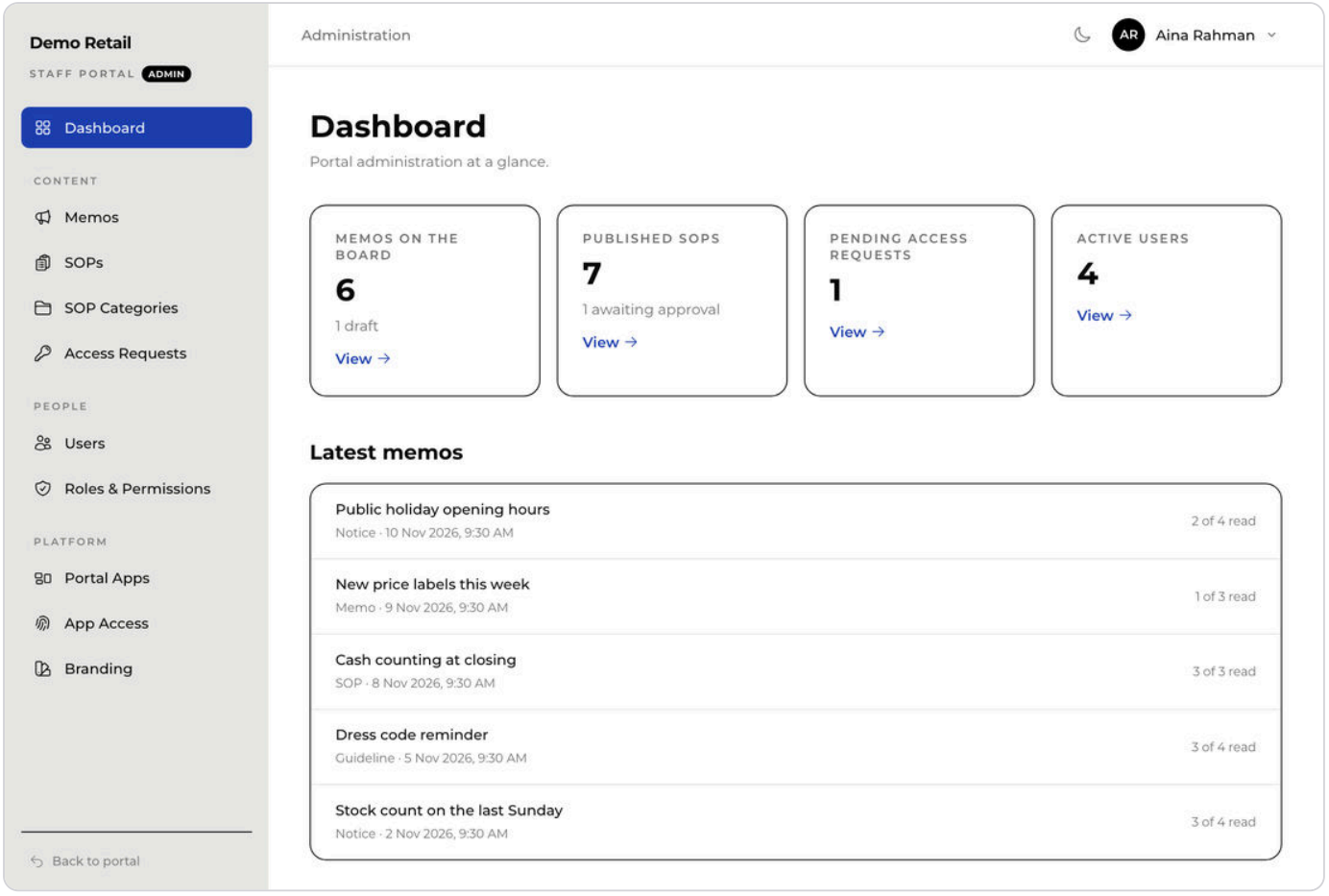
The admin area

For: Administrators

Only people with an admin role can open it. Everyone else gets "This action is unauthorized".

To open it, press **Administration** in the menu on the left, or press your name at the top right and choose **Administration**. It is also linked at the bottom of the front page.

The **Dashboard** shows memos on the board, published procedures, access requests waiting for an answer and active users. **Latest memos** shows how many people have read each one.



Menu	What you do there
Memos	Write, send, pin and follow up memos.
SOPs	Add procedures and publish new versions.
SOP Categories	The groups in the SOP Directory. Each has a short code that starts every procedure code in it, for example **RO** for SOP-RO-001.

Menu	What you do there
Access Requests	Staff asking to read a locked procedure.
Users	Each person's details and admin roles.
Roles & Permissions	What each admin role may do.
Portal Apps	The tiles on staff Home screens.
App Access	Who can open which app.
Branding	Your company name, logos, colour and front page text.

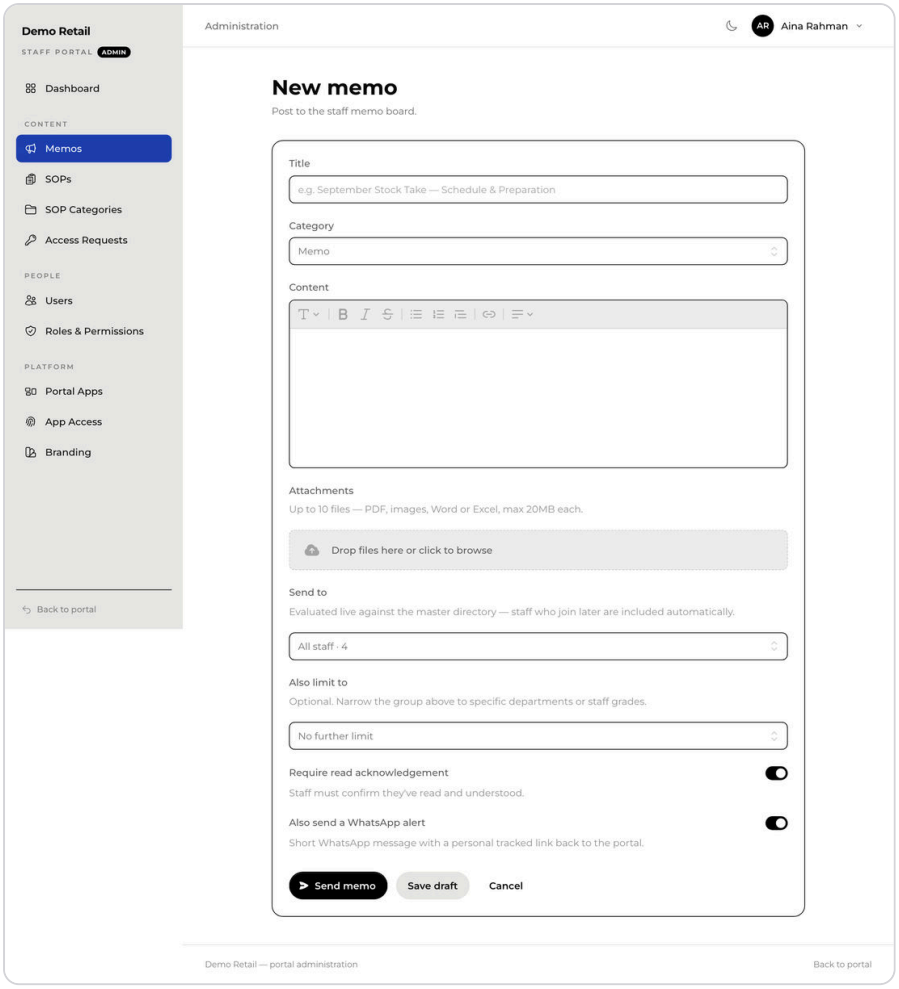
You only see the menu items your role allows. **Back to portal** at the bottom left returns you to your own screens.

STAFF MEMO

Post a memo

For: Administrators

1. In the admin area, press **Memos**, then **New memo**.
2. Fill in **Title** and pick a **Category**: **Memo**, **SOP**, **Guideline** or **Notice**.
3. Write the memo in **Content**. The toolbar above it adds bold, lists and links.
4. Add files under **Attachments** if needed: up to 10 files (PDF, pictures, Word or Excel), up to 20 MB each.
5. Under **Send to**, pick who sees it: **All staff**, **Outlet staff**, **HQ staff**, **Branch managers**, **Specific departments** or **Specific staff grades**. The number after each choice is how many people that is today.
6. To narrow it further, use **Also limit to**, for example outlet staff in one department only.
7. Switch on **Require read acknowledgement** if staff must confirm they have read it.
8. Switch on **Also send a WhatsApp alert** to send each person a short WhatsApp message with a link to the memo. This only works once your company's WhatsApp sender has been set up for the portal.
9. Press **Send memo** to put it on the board now, or **Save draft** to keep it hidden until later.



The audience is checked against the staff directory every time someone opens the board, so a person who joins later still sees the memo.

To send a draft later, open **Memos**, press ··· on its row and choose **Send memo**.

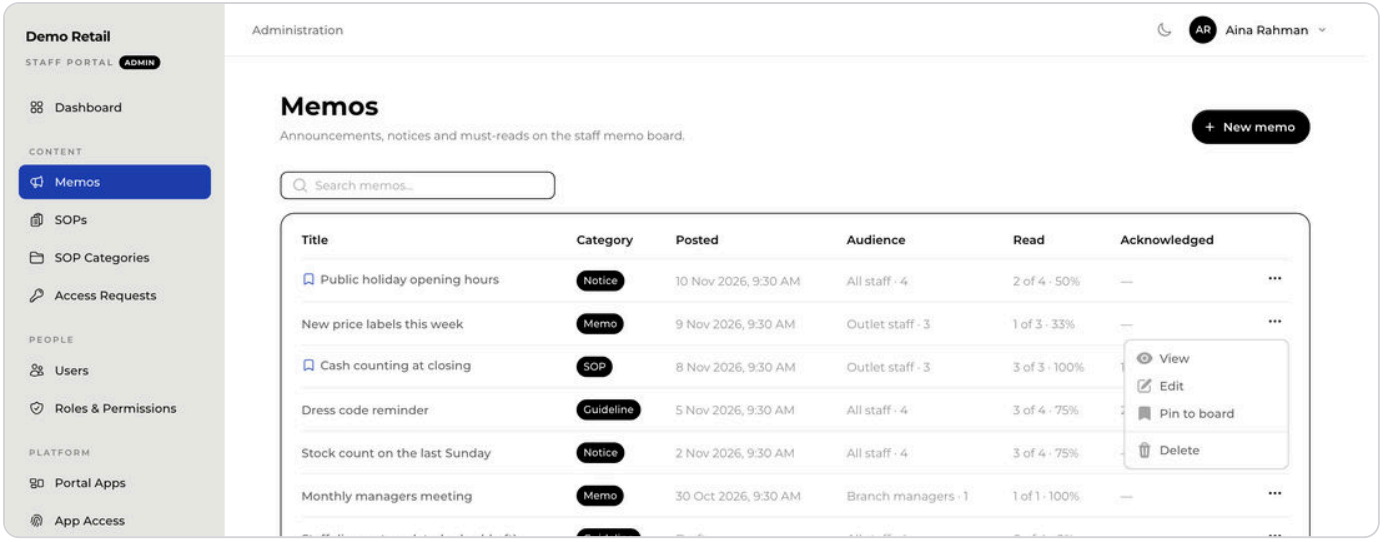
STAFF MEMO

Pin and follow up a memo

For: Administrators

Pin a memo to the top of the board

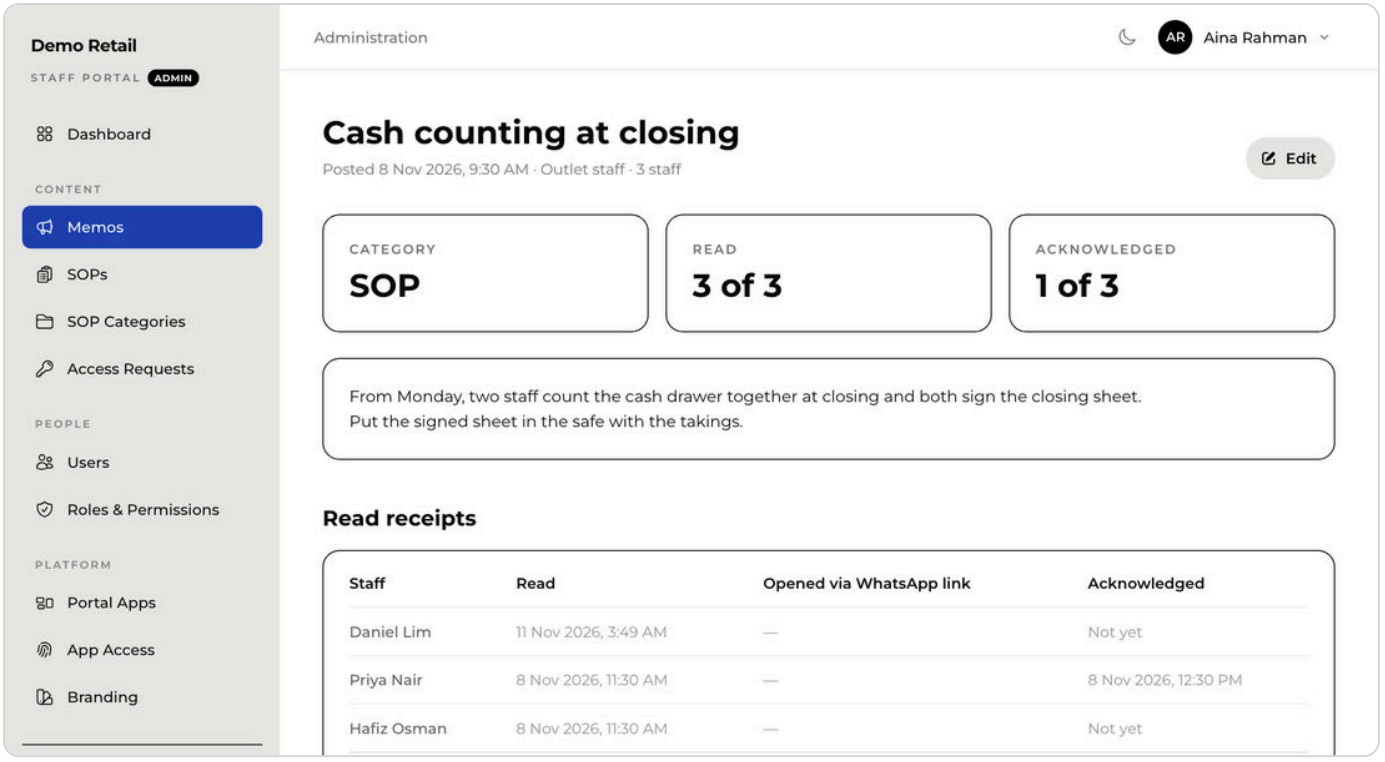
1. Press **Memos** in the admin area.
2. Press ⋯ at the end of the memo's row and choose **Pin to board**.



Up to two memos can be pinned at a time. To pin a third, first choose **Unpin from board** on one of the others. Only memos already sent can be pinned. A bookmark next to the title shows which memos are pinned.

See who has read it

The **Read** and **Acknowledged** columns show how many of the audience have opened and confirmed each memo. For names, press ⋯ and choose **View**.



Read receipts lists each person, when they read it, whether they came from the WhatsApp link, and when they confirmed it (**Not yet** if they have not).

Change or remove a memo

Press ⋯, then **Edit** to change it or **Delete** to remove it. Deleting also removes its read receipts.

STAFF MEMO

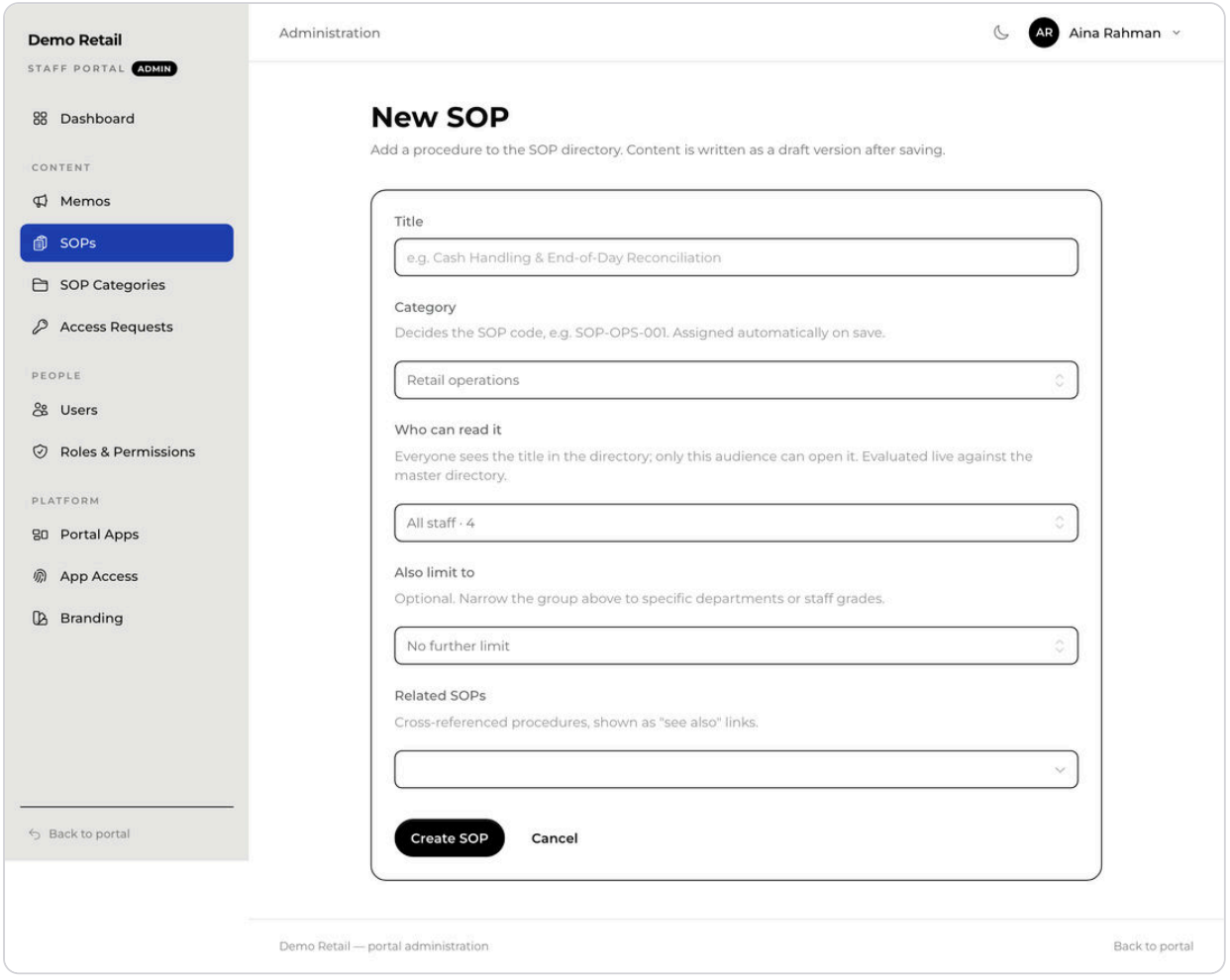
Add a procedure

For: Administrators

A procedure is added in two steps: first its details, then its content as a draft version.

Step 1: the details

1. In the admin area, press **SOPs**, then **New SOP**.
2. Fill in **Title**.
3. Pick a **Category**. It decides the code, which is given automatically when you save.
4. Under **Who can read it**, pick the group that can open it. Everyone else sees the title with a lock.
5. Use **Also limit to** to narrow it to some departments or staff grades.
6. Under **Related SOPs**, pick other procedures to show as links.
7. Press **Create SOP**. The procedure's own page opens.



Step 2: the content

1. On the procedure's page, open the **Versions** tab and press **New draft version**, then **Start draft**.
2. Press ⋯ on the draft's row and choose **Edit**.
3. Type the steps into **Content**, or attach a scan of the paper copy under **Scanned document** (PDF, JPG or PNG, up to 20 MB).
4. Fill in **What changed?** and, if needed, the **Effective date**. Switch on **Major revision** for a big change.
5. Press **Save version**.
6. Press ⋯ again and choose **Submit for review**.

The draft now waits for someone who can approve procedures. See *Approve and publish a procedure*.

If **Extract text with AI** appears in the menu for a scanned draft, it types the scan's text into the content for you. Check every line before you submit it. The option only shows when your company has switched it on.

Categories

Add or rename categories under **SOP Categories**. **Code prefix** is the short code at the start of each procedure code. **Sort order** decides the order in the directory.

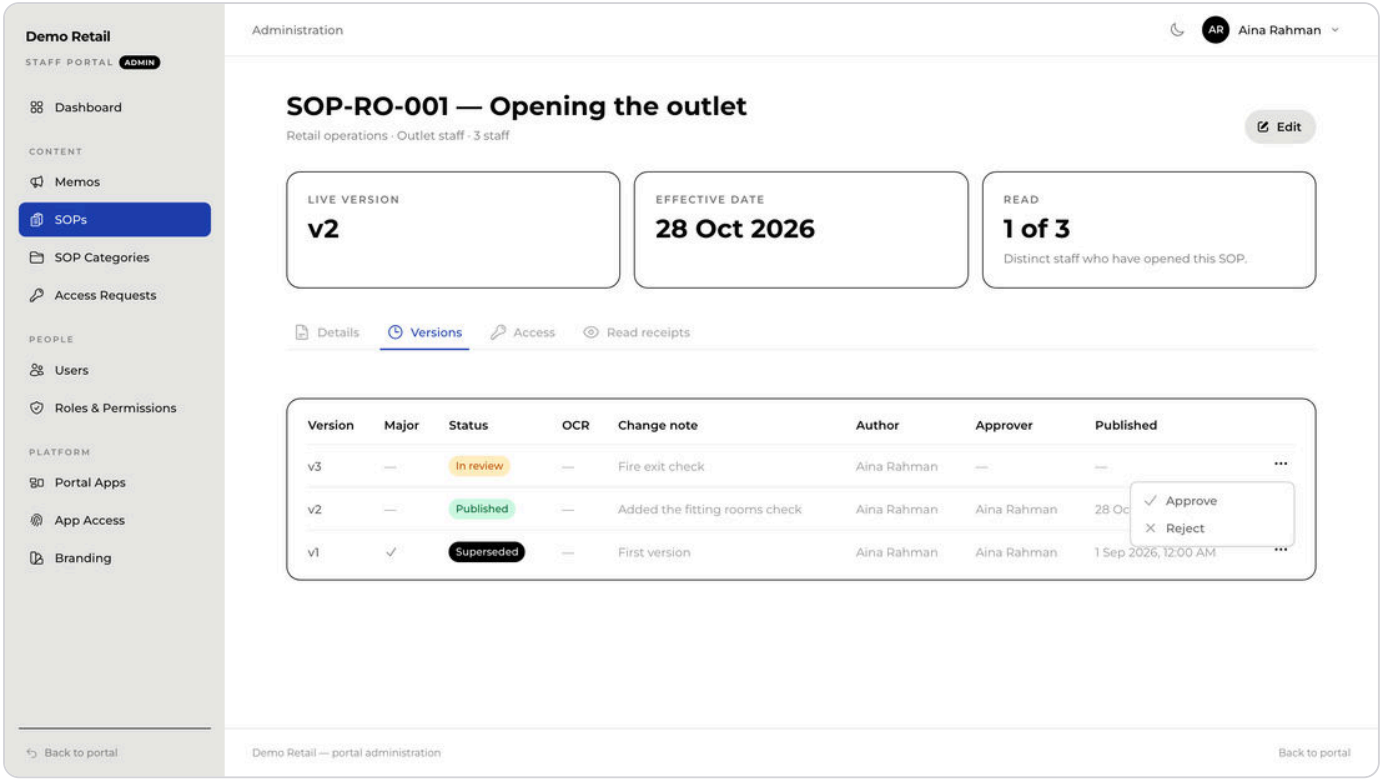
STAFF MEMO

Approve and publish a procedure

For: Administrators

A new version goes live in three steps: someone submits it, an approver approves it, and then it is published. You need the **Sop Approver** role (or **Super Admin**) to approve and publish.

1. In the admin area, press **SOPs**. A procedure with a version waiting shows it under **In progress**.
2. Open the procedure and the **Versions** tab.
3. Press ⋯ on the row marked **In review**.
4. Read it, then choose **Approve**, or **Reject** to send it back with a note saying why.
5. After approving, press ⋯ again and choose **Publish**. The version goes live in the directory straight away, and the old version is marked **Superseded**.



Change a live procedure

On the **Versions** tab, press **New draft version**. The draft starts with the live text, so you only change what is different. Fill in **What changed?**, press **Start draft**, then edit and submit it as in *Add a procedure*. Staff keep seeing the live version until the new one is published.

Who has read it

The **Read receipts** tab lists who has opened the procedure and which version they read.

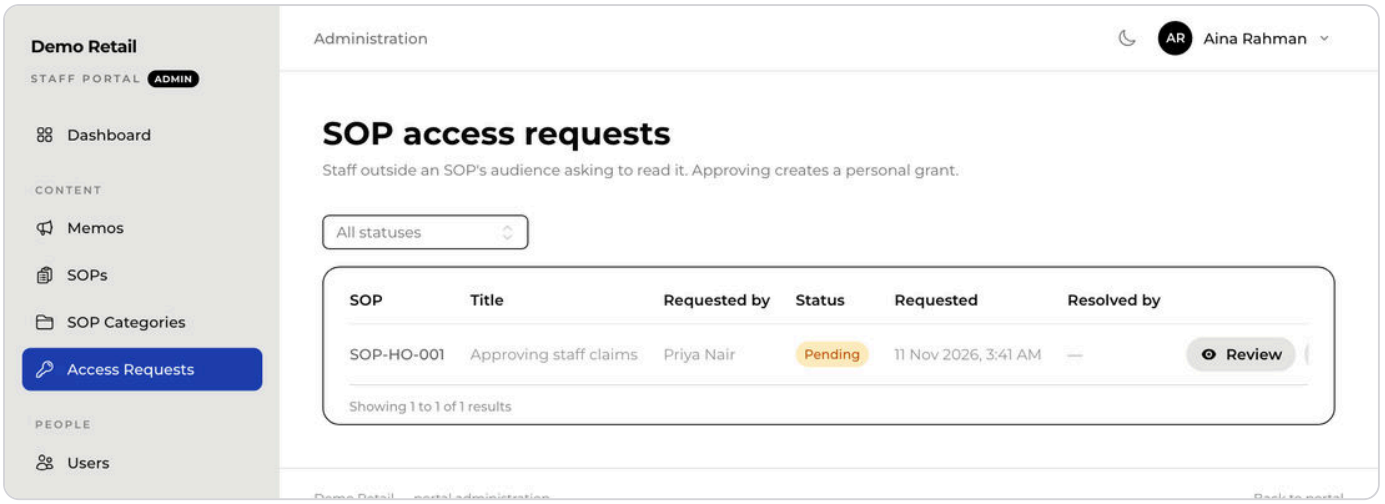
STAFF MEMO

Answer requests to read a procedure

For: Administrators

When a staff member presses **Request access** on a locked procedure, it appears here.

1. In the admin area, press **Access Requests**.
2. Press **Review** to look at the procedure first, if needed.
3. Press **Approve** to let that person read it, or **Deny** to refuse.



The person gets an email with the answer if their account has an email address. Approving gives that one person access to that one procedure. Nobody else changes.

Use **All statuses** to see past requests.

Give access without a request

Open the procedure, go to the **Access** tab and press **Grant access**. Pick the person and press **Grant access** again. To take it back, press **Revoke** next to their name under **Extra access grants**.

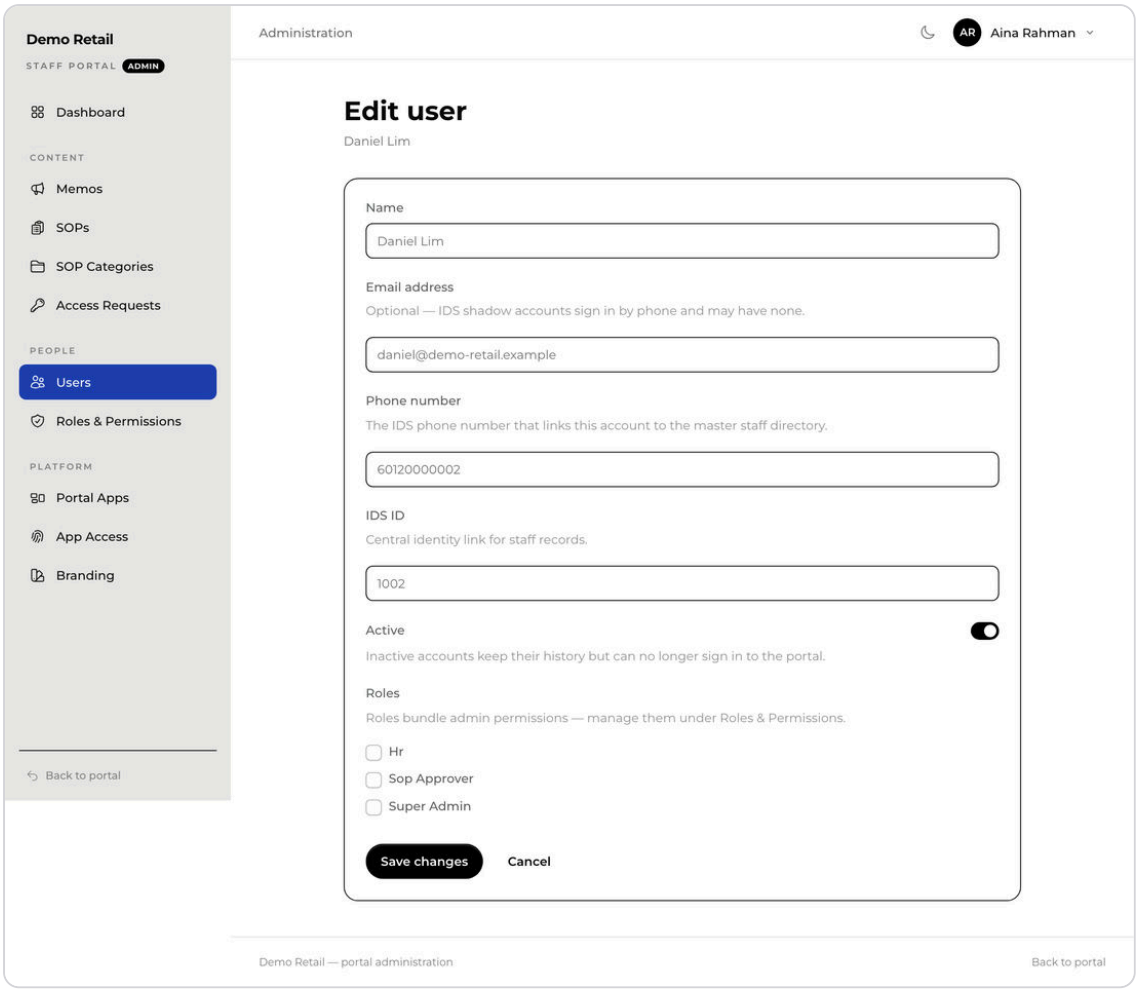
STAFF MEMO

Give someone admin rights

For: Administrators

Staff appear under **Users** after they sign in for the first time.

1. In the admin area, press **Users**.
2. Press the person's name.
3. Under **Roles**, tick the roles they need.
4. Press **Save changes**.



The roles that come with it:

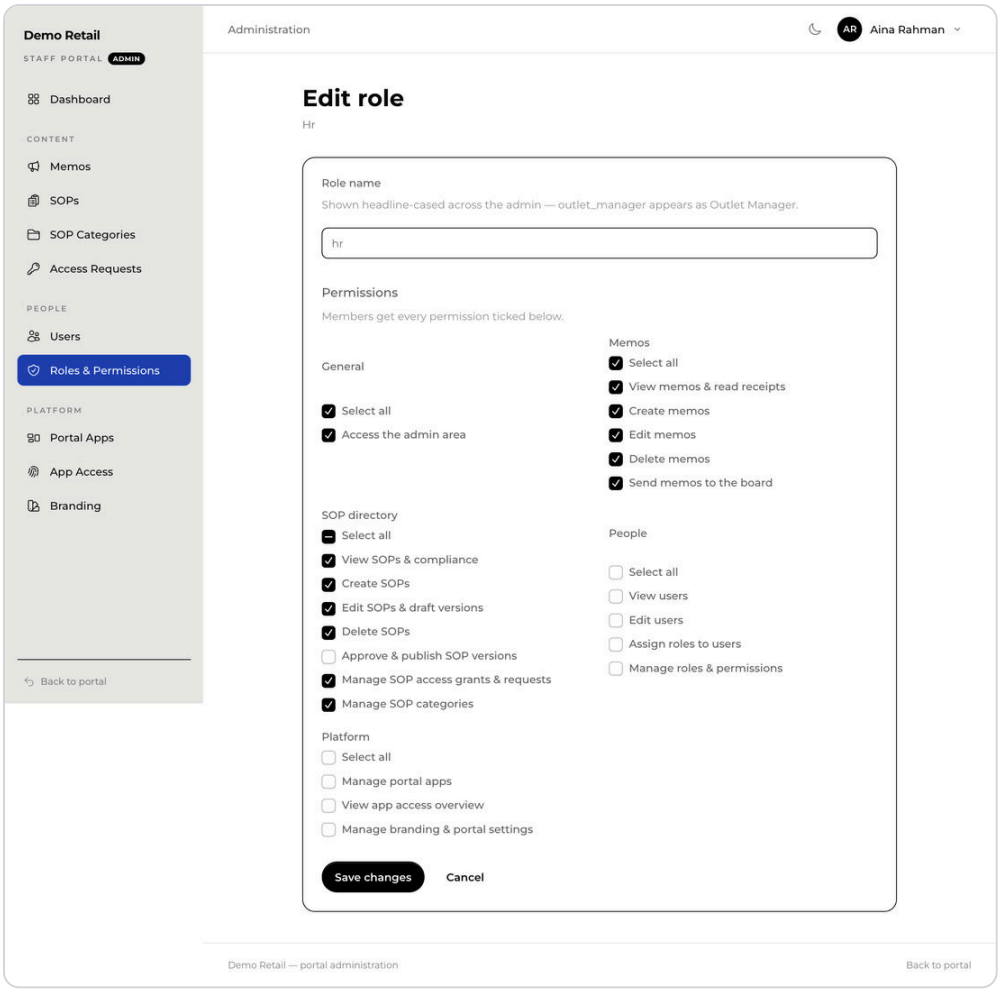
Role	What the person can do
Hr	Write and send memos, add and edit procedures, answer access requests and manage categories. Cannot approve or publish procedures.
Sop Approver	See procedures, approve and publish versions.

Role	What the person can do
Super Admin	Everything.

Switch off **Active** to stop someone signing in to the portal. Their history is kept.

Change what a role can do

1. Press **Roles & Permissions**, then a role, or **New role** for a new one.
2. Tick what the role may do. Each tick is one thing, for example **Send memos to the board** or **Approve & publish SOP versions**.
3. Press **Save changes**. Everyone with that role gets the change.



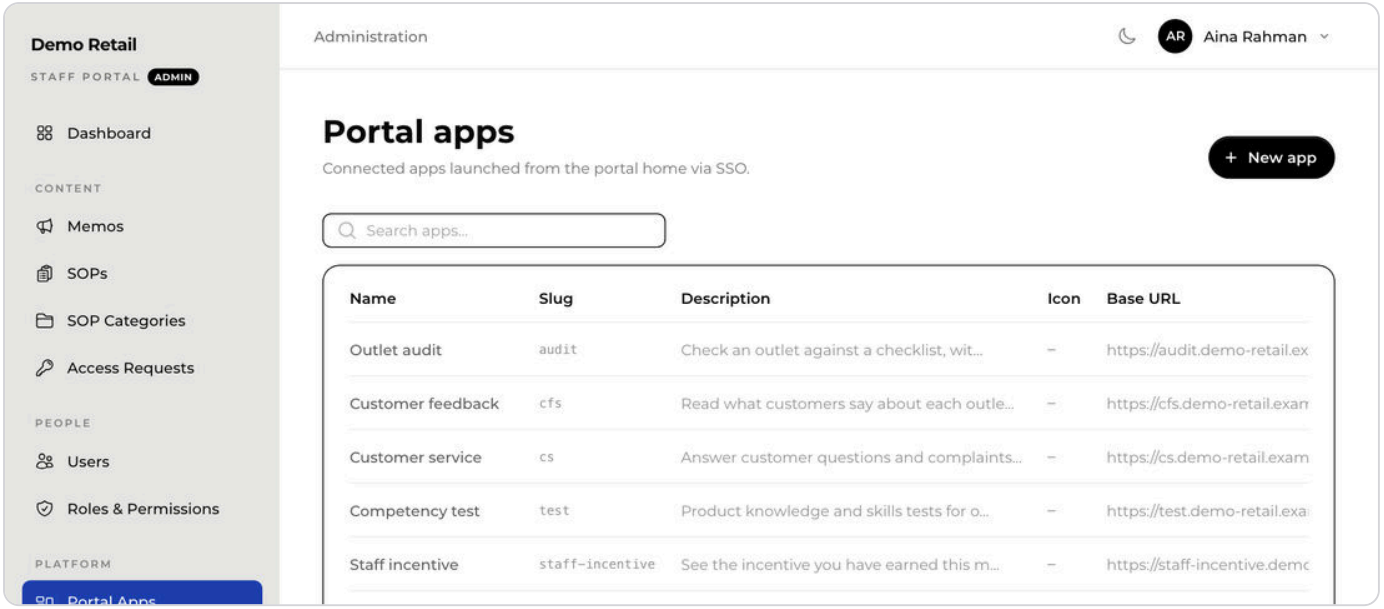
STAFF MEMO

Connect an app to Home

For: Administrators

Each tile on staff Home screens is set up here.

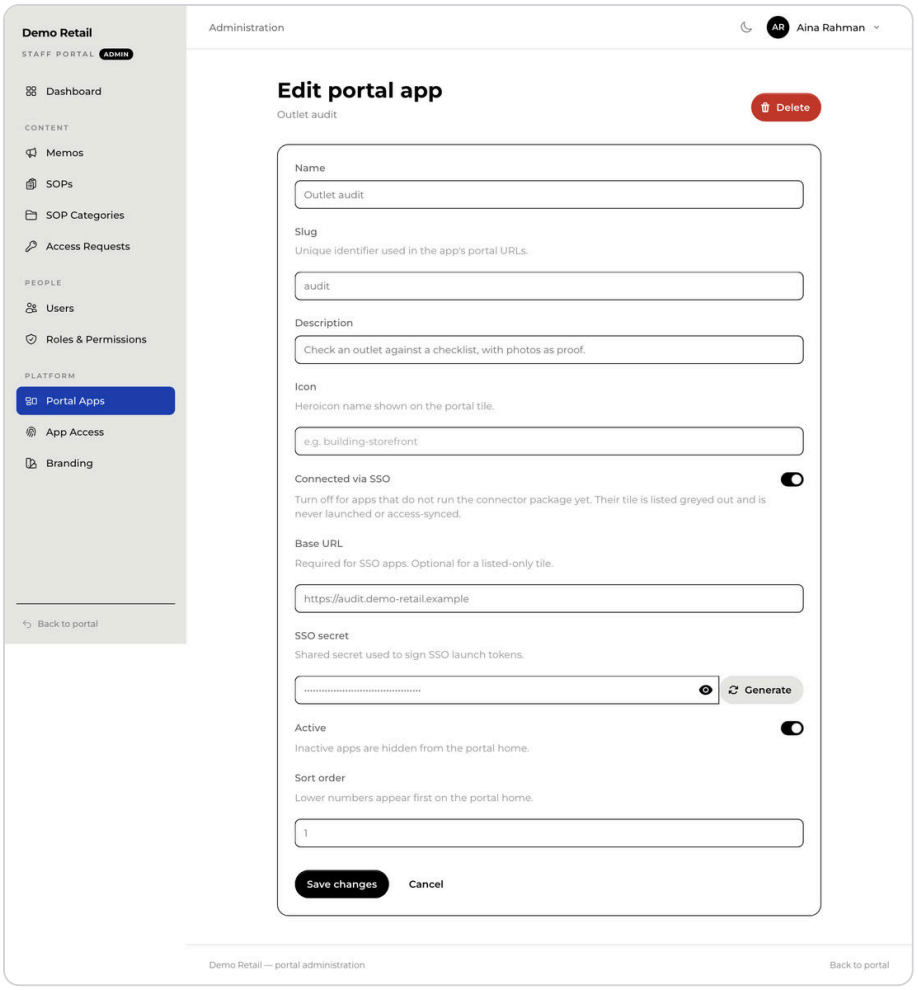
1. In the admin area, press **Portal Apps**.
2. Press **New app**, or press an app to change it.



3. Fill in the settings and press **Save changes**.

Setting	What it changes
Name, **Description**	What staff see on the tile.
Slug	The app's short name. It must match the short name set inside the app. Do not change it once staff use the app.
Connected via SSO	Switch it on when the app is ready to open straight from Home without a second sign-in. While it is off, the tile shows **Not connected yet** and cannot be opened.
Base URL	The app's web address. Needed when **Connected via SSO** is on.
SSO secret	A shared key that proves the portal sent the person. Press **Generate**, then enter the same key in the app's own setup. If the two differ, staff cannot open the app.
Active	Switch it off to hide the tile from everyone.

Setting	What it changes
Sort order	Lower numbers come first on Home.

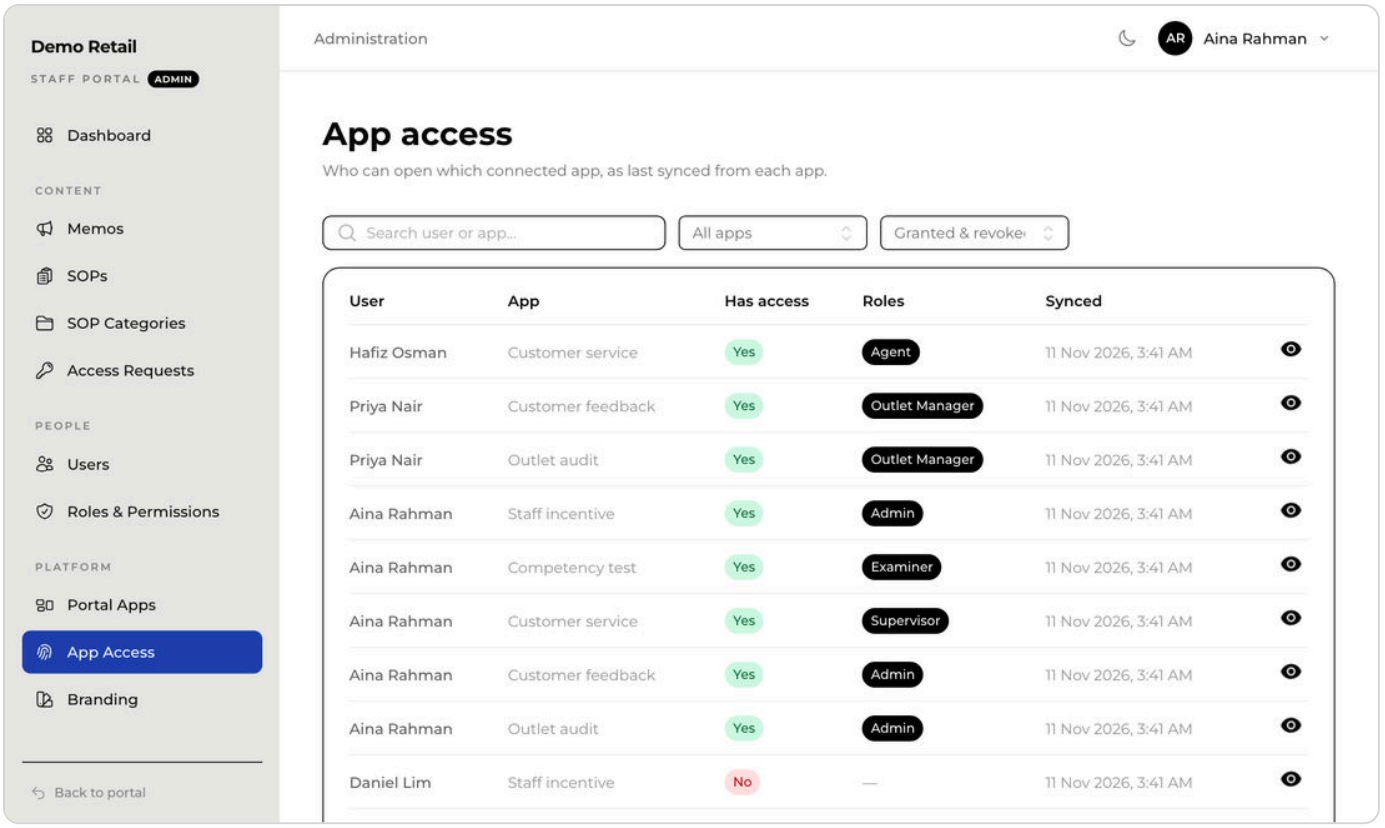


STAFF MEMO

See who can open each app

For: Administrators

App Access lists, for each person, which apps they can open and their role inside each.



You cannot change access here. Each app decides who may use it: change it inside the app, and it shows here the next time that person signs in, or after the nightly check at 2 am.

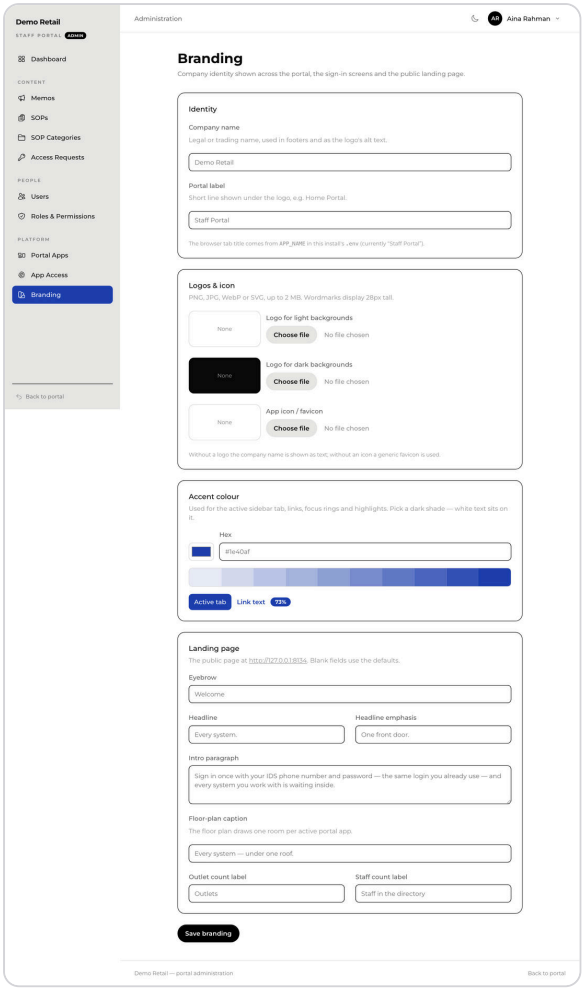
- Type a name or an app in **Search user or app...**.
- Narrow the list with **All apps** and **Granted & revoked**.
- Press the eye at the end of a row to see its details.

STAFF MEMO

Change your branding

For: Administrators

1. In the admin area, press **Branding**.
2. Change what you need, then press **Save branding** at the bottom.



Section	What it changes
Identity	**Company name** shows in footers and in place of a logo. **Portal label** is the small line under it.
Logos & icon	A logo for light backgrounds, one for dark backgrounds, and the small icon in the browser tab. PNG, JPG, WebP or SVG, up to 2 MB. Without a logo, the company name is shown as text.
Accent colour	The colour of the highlighted menu item, links and buttons. Pick a dark shade so white text stays readable. The preview below shows the result.

Section	What it changes
Landing page	The text on the public front page: the small line above the headline (**Eyebrow**), the headline, the paragraph under it, the picture caption and the two count labels. Leave a box empty to use the standard text.

The name in the browser tab is set when the portal is installed, not here. Ask IT to change it.