Customer Relation Management

Client Management

The Client module enables businesses to manage their clients effectively, covering everything from contact details and addresses to invoices, tasks, and reminders.

1. View Client List

- Display a list of all clients with key details such as name, email and contact number
- Filter and search clients based on client name.
- Sort clients by creation date, last updated date .

2. Create a Client

- Add new clients by entering essential information such as:
  - Full Name
  - Email Address
  - Phone Number
  - Address

3. Client Details

- View complete information about a client, including:
  - Profile details
  - Contact information
  - Associated projects, tasks, invoices, payments, and proposals

4. Client Profile Details

- Detailed view of the client's profile including:
  - Company and personal details
  - Associated contacts
  - Linked projects and tasks

5. Add & Update Client Billing Address

- Add or edit the client's billing address for invoice and payment purposes.

6. Add & Update Client Shipping Address

- Manage the client's shipping address for product deliveries.

7. Client Contacts Management

- **Create Client Contact**
    - Add multiple contacts under a client with role-based permissions such as:
        - Read-only access
        - Edit access
        - Invoice and payment management
        - Task and project management
- **Client Contact List**
    - View and manage all contacts associated with a client.

8. Client Notes

- **Add Note**
    - Create and store important client-related notes.
- **View Notes List**
    - View all notes added to a client profile.
    - Drag and drop notes to adjust priority.

9. Client Projects

- **Add Project**
    - Create a new project for a client.
- **View Project List**
    - Display all projects linked to a client.

10. Client Tasks

- **Add Task**
    - Assign and manage client-specific tasks.
- **View Task List**
    - View all assigned tasks for a client.

11. Invoices

- **Create Invoice**
    - Generate invoices based on product selection, warehouse availability, and tax rates.

- **Generate & Share Invoice PDF**
  - Create a PDF version of the invoice.
  - Share the invoice with the client via email or messaging apps.

12. Payments List

- View all payments received from the client.

13. Proposals

- **Create Product Proposal**
  - Generate proposals for a client with multiple product selections.
- **Proposal List**
  - View the proposal list.

14. Estimates

- **Create Product Estimate**
  - Generate estimates with multiple product selections.
- **Estimate List**
  - View estimate list.

15. Expenses

- **Create Expense**
  - Log expenses associated with the client.
- **Expense List**
  - View and categorize expenses.

16. File Management

- **Upload Files**
  - Attach multiple documents related to the client.
- **View File List**
  - View, download, and manage uploaded files.

17. Reminders

- **Add Reminder**
  - Set follow-up reminders for client meetings, payments, or other tasks.
- **View Reminder List**
  - Manage and receive notifications for upcoming reminders.

Employee Management

This module helps manage employees, departments, and designations within the CRM system.

1. Employee List

- View all employees with details like name, department, and designation.

2. Department & Designation List

- View available departments and designations in the organization.

3. Create Employee, Department & Designation

- Add new employees along with their assigned department and designation.

4. Employee Details

- View detailed employee information, including assigned projects and tasks.

5. Update Employee Details

- Modify an employee’s details, such as:
  - Name
  - Email
  - Designation
  - Profile Picture

6. Delete Employee

- Remove an employee from the system.

Project Management

This module helps users manage projects, track progress, and organize discussions.

1. View Project List

- Display a list of all active and completed projects.

2. Create a New Project

- Add a new project with:
  - Title
  - Description
  - Client Name
  - Assigned Team Members
  - Start & End Date

3. Project Details

- View comprehensive project details, including:
  - Overview
  - Assigned members
  - Project status

4. Update Project Status

- Change the project's progress status (is complete or not).

5. Project Tasks

- **Create Task**
  - Assign tasks under the project.
- **Task List in Project Details**
  - View all tasks related to a project.

6. Project Milestones

- **Add Milestone**
  - Define key milestones.
- **View Milestone List**
  - Track milestone completion.

7. Project Emails

- **Send & Receive Emails**
    - Manage project-related emails.

8. Project Files

- **Upload & View Files**
    - Attach documents, reports, and resources.

9. Project Discussions

- **Create Discussion**
    - Initiate discussions related to the project.
- **Discussion List**
    - View all discussions and replies.

10. Project Notes

- **Create Notes**
    - Store important notes related to the project.
- **Prioritize Notes**
    - Move note cards based on priority.

11. Project Members & Activities

- **View Member List**
    - See all team members assigned to the project.
- **Activity Logs**
    - Track project-related activities.

Task Management

The Task module helps users manage, track, and organize tasks efficiently.

1. Task List

- View all tasks, including status (Pending, In Progress, Completed).

2. Create Task

- Add a new task with:
    - Task Title
    - Description
    - Due Date
    - Assigned Employee

3. Task Details

- View complete task information, including assigned members and status.

4. Update Task Status

- Modify task status and progress updates.

5. Task Comments

- **Add Comment**
    - Leave comments for collaboration.
- **View Comment List**
    - Display task-related discussions.

6. Task Reminders

- **Add Reminder**
    - Set task-specific reminders.
- **View Reminder List**
    - Manage all reminders.

7. Task Checklists

- **Create Checklist**
    - Add subtasks or steps within a task.
- **View Checklist**
    - Track completed checklist items.

8. Task Timer

- **Start Task Timer**
    - Track time spent on a task.
- **View Timer List**
    - See time logs for all tasks.

9. Task Files

- **Upload & View Files**
    - Attach supporting files for tasks.

Notice Management

- Create a notice with multiple image uploads to enhance documentation.
- Include necessary information such as department selection, subject, and date to categorize notices effectively.
- Search notices efficiently by selecting a specific month, allowing users to filter past notices with ease.
- Display the notice list in an organized manner, showcasing the latest notices first.

Phonebook Management

- Maintain a comprehensive employee list sorted by designation for quick reference.
- Provide individual employee details, including name, contact number, email, and department.
- Enable direct email and phone call options from the employee details page for seamless communication.

Meeting Management

- Create and schedule meetings by selecting the date, time, location, and participants.
- Allow users to upload multiple image files related to the meeting, such as agendas or supporting documents.
- Implement a search function to retrieve past and upcoming meetings by selecting a specific month.
- Ensure reminders and notifications are sent to attendees for scheduled meetings.

Attendance Management

- Provide check-in and check-out options, allowing users to mark attendance from home or office.
- Offer an option to select a shift (morning, evening, night) to track different work schedules.
- Maintain a detailed attendance report for users, displaying daily, weekly, and monthly logs.
- Generate automated alerts for missing check-ins or late arrivals.

Leave Management

- Allow users to request leave by specifying start and end dates along with a reason.
- Implement an approval workflow where managers can approve or reject leave requests.
- Display available leave balance for each user to help them track their remaining days off.
- Generate leave reports to analyze patterns and trends in leave requests.

Visit Management

- Enable users to create a visit by selecting the date and time, ensuring proper scheduling.

- Allow users to update visit locations and reschedule plans if needed.
- Provide an option to update visit details, including objectives and expected outcomes.
- Offer a notes section in visit details to document key takeaways and discussions.
- Implement status updates such as "Reached", "Start Visiting", and "End Visit" for real-time tracking.
- Automatically add completed visits to the visit history list for reference.
- Introduce a search functionality to filter the visit list and history based on selected months.
- Generate reports to analyze visit success rates and employee productivity

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Sales Management

Sales Dashboard

- Provides quick access to key sales modules such as **Products, Adjustments, Stocks, Purchase, Sales, Quotation, Biller, and Customer**.
- User-friendly interface for navigating different sales-related functionalities

Product Management

- View a list of all products with essential details such as **name, SKU, brand, unit, stock, price, quantity and status**.
- Display total number of products.

Add Product

- Form to add new products with fields including:
    - Product Name, Product Type, Product Code (Auto-generated)
    - Barcode, Brand, Categories
    - Product Unit, Sale Unit, Purchase Unit
    - Product Cost, Product Price, Tax and Tax Method
    - Daily Sale Objective, Alert Quantity
    - Options to mark the product as **Featured** or generate a **Barcode**

    - Muliple product image upload

Adjustment Management

- View a list of all adjustments with essential details such as **product name, reference, warehouse and date** .
- Display total number of adjustment .
- There are also option for add Adjustment

Stock Management

- Track available stock levels for each product.
- Display total number of Stocks.
- Add Stoks by select stock type, categories and brands

Purchase Management

- View a list of all purchase with essential details such as **name,date, reference, supplie, stock,purchase status, payment status and all other amount like paid, due, grandtotal and returned amount**.
- Display total number of purchase .
- Also add an option to create purchase

Sale Management

- View a list of all sales with essential details such as **Customer name, biller, sale status, payment status and delivery status** .
- Display total number of sales.

Add Sale

- Form to add new sales with fields including:
    - Start date, reference no, customer selection ,
    - Warehouse selection, biller selection,
    - Product selection which is depend on warehouse selection
    - Order tax, document type, shipping cost, product image upload
    - Sale status, payment status and so on

Quotation Management

- View a list of all quotations with essential details such as **date, reference, warehouse and biller, customer, supplier and grand total** .
- Display total number of quotations.
- There are also option for add quotations

Biller and Customer Management

- View a list of all biller and customer with essential details such as **name, email, address and company name**.
- Display total number of customer and biller.
- There are also option for a add customer and biller with essential information.

Lead Management

This module helps users manage leads, track interactions, and convert potential clients into customers.

1. View Lead List

- Display a list of all active and inactive leads.

2. Add a New Lead

Create a new lead with:

- Title, name email, phone
- Address (City, State, Zip Code, Country)
- Website

- Lead Type & Status
- Description and next follow up

3. Lead Details

View comprehensive lead details, including:

- Contact Information
- Assigned Sales Representative
- Lead Source & Status

6. Lead Activities

- Log Calls, Emails, and Meetings
- Record Notes on Lead Interactions

7. Lead Emails

- Send & Receive Emails
- Track Email History

8. Lead Attachments

- Upload & View Documents (Proposals, Contracts, etc.)

10. Lead Notes

- Create Notes for Important Lead Information
- Prioritize Notes Based on Urgency

Booking Management

Booking Dashboard

- Provides quick access to key booking modules such as **Service, Discount, Campaign and Coupon**.
- User-friendly interface for navigating different booking-related functionalities

Service Management

- View a list of all services with essential details such as **service name, category, zone , billing price and sale status** .
- Display total number of services.

Add Service

- Form to add new service with fields including:
    - Service Name, category, sub category
    - Tax percentage, zone selection, status
    - Add multiple tags, thumbnail image, cover image
    - And also add description for create a service

Discount, Campaign & Coupon Management

- View a list of all discount, campaign and coupon list with essential details such as **title, type, zone and payment status**
- Display total number of discount, campaign & coupon list .

Add Discont, Campaign & Coupon

- Form to add new discount, campaign & coupon with fields including:
    - Discount type, title with multi select category and zone
    - There are a option to choose the Discount type (Percentage, Fixed)
    - Discount amount, start date , end date
    - Minimun and maximum purchase amount

Support Management

- Create and schedule support by selecting priority, subject, and support description.
- Allow users to upload multiple image files related to the support such as agendas or supporting documents.
- Implement a search function to retrieve past and upcoming support by selecting a specific month.

Appointment Management

- Create and schedule appointment by selecting with user want to make an appointment , location, date with start time and end time.
- Allow users to upload image files related to the appointment such as agendas or appointment documents.

Contracts Management

- Create Contract and contract type
- Show Contract list and contract type list

Mailbox Management

The **Mailbox Management** module enables users to efficiently manage email communications within the CRM. It provides a seamless way to compose, organize, and track emails related to various CRM entities such as projects, tasks, leads, invoices, estimates, proposals, contracts, tickets, notes, and sales payments.

1. Compose Email

Users can compose and send emails directly from the CRM with the following features:

- **Select Related Entity**: Associate emails with specific projects, tasks, leads, invoices, estimates, proposals, contracts, tickets, notes, or sales payments.
- **Multiple Recipients**: Choose multiple recipients from contacts within the CRM.
- **CC Options**: Include additional recipients using CC (carbon copy)
- **Subject Field**: Add a subject line for clarity and relevance.
- **Attachments**: Upload multiple image files and documents.
- **Message Body**: Draft the email content with rich-text formatting options.

2. Inbox Management

The inbox serves as the central hub for all incoming emails. Users can:

- **Mark Emails as Starred**: Highlight important emails for quick access.
- **Mark Emails as Important**: Categorize emails that need immediate attention.
- **Move Emails to Trash**: Delete unwanted emails and remove clutter.

3. Sent Emails

- View and track all sent emails.
- Check delivery status and timestamps.
- Re-send or forward emails if necessary.

4. Starred Emails

- A dedicated section to access emails marked as starred.
- Quick filtering options to locate priority messages easily.

5. Important Emails

- A separate list to track emails marked as important.
- Ensure high-priority communications are not overlooked.

6. Trash Management

- View and manage deleted emails.
- Permanently delete unwanted emails after a certain period.

Timesheet Management

The **Timesheet Management** module enables users to efficiently track and manage work hours, schedules, approvals, and reports within the CRM. It offers a structured approach to monitoring employee time allocation on different projects and tasks.

1. Timesheet Dashboard

- Provides quick access to key timesheet modules, including:
  - **Timesheet**
  - **Monthly Overview**
  - **Schedule Overview**
  - **Approve Hours**
  - **Hourly Statistics**
  - **Resource Plan**
  - **Timesheet Report**
- Features a user-friendly interface for easy navigation and efficient time management.

2. Timesheet Overview

- Users can add and manage timesheet entries with the following details:
  - **Start Date**: Define the date of the timesheet entry.
  - **Employee Selection**: Assign the timesheet entry to a specific employee.
  - **Project Selection**: Link the timesheet to a relevant project.
  - **Task Selection**: Assign a task under the selected project.
  - **Start & End Time**: Specify work duration for accuracy.
  - **Notes**: Add relevant comments or descriptions regarding the work completed.
- Displays a detailed timesheet overview list sorted by:
  - Selected Date
  - Employee

3. Monthly Overview

- Provides a structured view of logged hours on a monthly basis.
- Users can filter and sort data based on:
  - Selected Month
  - Employee

4. Schedule Overview, Hourly Statistics & Approve Hours Overview

- Displays detailed work hour logs based on:
  - Date Range Selection
  - Project Selection
  - Employee Selection
- Enables managers to review and approve logged work hours efficiently.

5. Timesheet Report

- Generates comprehensive reports with customizable filters based on:
  - Date Range
  - Project Selection
  - Employee Selection
  - Task Selection
  - Client Selection
- Provides valuable insights into employee work patterns and project time allocation.

Event Calender

Calendar Event Display

- Users can view events and notes directly on the calendar.

- Events and notes are marked on specific dates for easy identification.

Event & Note Creation

- Users can pick a date to create multiple events or notes.
- A form opens to enter event/note details (title, description, time, etc.).

Event & Note Deletion

- Users can remove an event or note from a specific date.
- Deletion confirmation is required to prevent accidental removal.

Event & Note Listing

- By selecting a date, users can see a list of all events/notes for that day.
- Each event/note entry includes title, time, and description.

Event & Note Details View

- Users can select an event/note from the list to see full details.
- Option to delete the selected event/note.