Salez.ai -User Manual -V1.1

Document Control

Revision History

Date	Author	Version	Change Reference
15-June-23	Muhammad Abdullah	1.0	Initial Draft
02-Aug -23	Ismail	1.1	Revised
20-Sep -23	Muhammad Abdullah	1.2	Revised
05-Oct-23	Muhammad Abdullah	1.3	Revised

Introduction

The purpose of Salez.ai is to offer businesses a seamless and efficient one-stop solution, enabling customers to effortlessly access and leverage these software components from a single unified platform.

The scope of Salez.ai spans the entire sales and customer management spectrum, seeking to streamline processes and enhance operational efficiency for businesses. Salez.ai aims to empower organizations with actionable insights, providing them with a competitive edge in the market. With an emphasis on a centralized and user-friendly experience, Salez.ai facilitates improved sales operations, customer relationship management, and data-driven decision-making.

The scope of Salez.ai's offering extends to encompass the seamless integration of CRM, E-commerce, and POS functionalities, providing businesses with a holistic and efficient sales management solution. By offering a centralized platform for managing customer interactions, conducting online sales transactions, and facilitating in-store transactions, Salez.ai aims to simplify operations, reduce complexity, and ensure a smooth flow of data across different business functions.

Product Overview

Salez.ai is a comprehensive and integrated solution designed to provide businesses with a seamless and efficient one-stop platform for sales and customer management. The purpose of Salez.ai is to enable businesses to effortlessly access and leverage the combined power of Customer Relationship Management (CRM), E-commerce, and Point of Sale (POS) functionalities from a single unified platform.

Salez.ai is developed in three distinct phases, with each phase focusing on a specific Product. The first phase centres around the implementation of CRM functionalities. This includes managing customer interactions, tracking leads and opportunities, and enhancing customer engagement and retention strategies. By consolidating customer data and providing advanced CRM capabilities, Salez.ai enables businesses to effectively nurture customer relationships and drive sales growth.

The second phase of Salez.ai involves the development of E-commerce functionalities. This encompasses the creation of an online sales platform, including a product catalogue, shopping carts, secure payment processing, and order fulfilment capabilities. By integrating E-commerce functionalities into Salez.ai, businesses can seamlessly conduct online sales transactions, reach a broader customer base, and enhance their digital presence.

The final phase of Salez.ai focuses on the development of Point of Sale (POS) functionalities. This component enables businesses to process in-store transactions, manage inventory, generate sales reports, and facilitate a smooth checkout experience for customers. By incorporating POS functionalities, Salez.ai offers businesses a comprehensive sales management solution that covers both online and offline sales channels.

Deliverables

The following features are based on the initial scope defined and may need further collaboration to closely match the actual set of requirements

- UI Mockups/Design
- CRM (Customer Relationship Management)
- E-Commerce Platform
- POS (Point Of Sales) System

Functional Hierarchy

The CRM will have the following roles with different dashboards for each role

- System Administrator (Company Admin)
- Users (Created by Company Admin)

System Administrator (Company Admin)

The System Administrator, also referred to as the Company Admin, is a key role responsible for overseeing and managing the CRM system at an organizational level. This role possesses elevated privileges and holds the highest level of access within the system. The System Administrator's responsibilities include:

- Users Management
- Apps Management
- System Configuration
- Data Management
- Security and Permissions
- Customization

Users (Created By Company Admin)

Users are individuals within the organization who utilize the CRM system to perform their daily tasks and responsibilities. Users are created and managed by the System Administrator. Each user is assigned a specific profile within the CRM system, which determines their access and limitations. Some key aspects of user roles include:

- Access and Permissions
- Limitations and Functionalities

Functional Hierarchy Diagram

After opening the application, the system administrator will be able to view the below-mentioned pages/screens:

Administrator Module

- Registration/Signup
  - Register themselves using the Signup Form
- Login
  - Login Via Username & Password
  - Email Verification
  - Remember Me Feature

- Forgot password
  - Username Validation
  - Email Reset Link Verification
- Set up Profile
  - Update/view profile details
  - Change Password
  - View login History
- User Management
  - Roles Management
  - Profiles Management
  - User List Management
  - Groups Management
- Apps
  - Individual App
    - Modules Listing
    - Lead CRUD Operations
  - Edit Mode
    - Module Management
    - View Type Management
    - View Management
    - Field Management
    - Sections Management
    - Users,Profile & Group Access Management
    - Advance User Application
- Settings
  - App Settings
    - App Creation (5 Steps)
    - Assigning Modules
    - Assigning Profiles
    - Assigning Permissions & Access
    - Crud Operations
  - App View
    - Modules
    - Crud Operations
    - Filters
    - Kanban
    - Search Settings
  - Lead Mapping
  - Web To Lead

Functional Details

System Administrator (Company Admin)

Registration/Signup

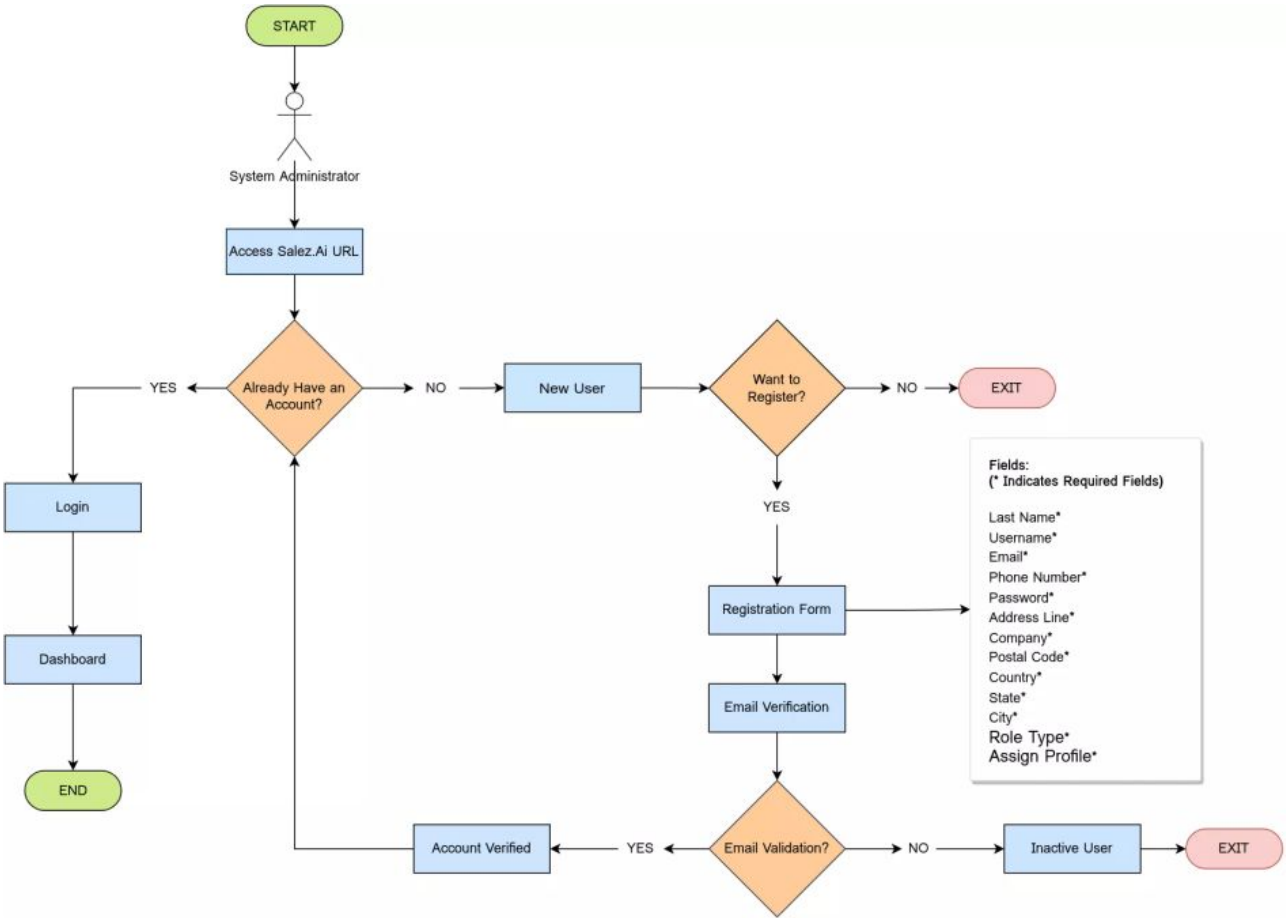
To enhance user experience and provide system administrator with the convenience of self-registration, the platform offers a user-friendly interface that allows individuals to create their accounts easily.

When the System Administrator access the Salez.Ai URL it will automatically redirected to the login page. On the login page he can see the option for Signup. By clicking on that, he can access the Signup form to create a new account, the following fields will be available during the signup process:

(indicates required fields in signup process)*

- First Name*
  - The system administrator needs to enter their first name.
  - Validation
    - The name should contain only alphabetic characters (letters) from the alphabet.
    - Special characters, numbers, and symbols are not allowed in the "First Name" field.
    - The field should not be left blank or contain any spaces in beginning and end of the first name.
- Last Name*
  - The system administrator needs to enter their last name.
  - Validation
    - The name should contain only alphabetic characters (letters) from the alphabet.
    - Special characters, numbers, and symbols are not allowed in the "Last Name" field.
    - The field should not be left blank or contain any spaces in beginning and end of the last name.
- Username*
  - This field requires the system admin to enter their username.
  - Validation
    - The username must be unique and in the format of an email address, for example, Smith@salezai.com.
    - Username field must have case-insensitive checks for email addresses, meaning (Smith@salezai.com) and (smith@salezai.com) are treated as the same username
- Email*
  - It is mandatory to provide a valid and real email address during the account registration process.
  - The verification link is sent to the email address provided by the system admin during the registration process.
  - To complete the account verification process, the system administrator needs to click on the verification link received in their email. Account verification ensures the security of the registration process and helps prevent the use of invalid or reauthorized email addresses.
  - Validation
    - After the input of all fields when the system admin clicks the submit button. From that time, the account remains inactive until system admin will verify their account through the provided email address.
- Phone Number*
  - It is mandatory for the system administrator to provide a phone number during the account registration process. The administrator must first choose a country code from a drop-down menu present in this field and then enter the phone number based on the selected country code.
  - Validation
    - There is a validation in place for phone numbers to ensure they do not exceed 15 digits. This validation serves to maintain data integrity and adhere to the standard format for phone numbers.
- Password*

    - This platform maintains strict security measures, and thus, system administrator are required to create a password that meets specific complexity requirements.
    - Validation
        - The password validation includes a minimum of 8 characters, at least 1 uppercase letter, 1 lowercase letter, 1 number, and 1 special character.
        - Disallow spaces at the beginning or end of passwords to ensure users don't inadvertently create a password with leading or trailing spaces.
- Address*
    - The System Administrator needs to enter their postal address, which is useful for contact and correspondence.
- Company*
    - The System Administrator needs to specify the name of the company or organization they are associated with.
- Postal Code*
    - The System Administrator needs to provide the postal code or ZIP code associated with their address.
- Country*
    - To enhance accuracy and ensure compatibility, the platform offers a user-friendly approach.
    - When the System Administrator enters the input field for the country. Instead of manually typing the country name, the system provides a convenient drop down menu that dynamically fetches a comprehensive list of countries using an API. So, The System admin can easily select their country of residence or operation from this list.
- State*
    - Upon selecting the country, the platform dynamically fetches a list of states or regions specific to the chosen country. The system Administrator can select the appropriate state from this list.
- City*
    - Similar to the state field, the city field presents a drop-down menu that dynamically populates the available cities based on the selected state. System administrator can select their city from this list.
- Roles*
    - From this field, its required for the system admin to choose their roles from a drop-down menu that contains the predefined list of basic roles. Selecting a role helps us better understand their professional position within their organization.
        - CEO
        - CTO
        - Administrator
        - IT Manager
        - Business Development Manager
        - Sales Manager
- User Notification
    - After successful registration, administrator will be presented with a popup message confirming the successful creation of their account. This popup serves as a notification that their account registration process has been completed successfully.
    - This popup includes essential details and instructions, such as a button labelled "Let's Get Started." By clicking on this button, the system administrator will be seamlessly redirected to the login page of the CRM system.
- Inactive User
    - In addition to the confirmation message, the platform sends a verification email to the provided email address. The verification email is an essential step in the registration process as it ensures the authenticity of the account and confirms the validity of the email address.
    - The accounts remains inactive until system admin will verify their account through the provided email address.
- User Flow Diagram



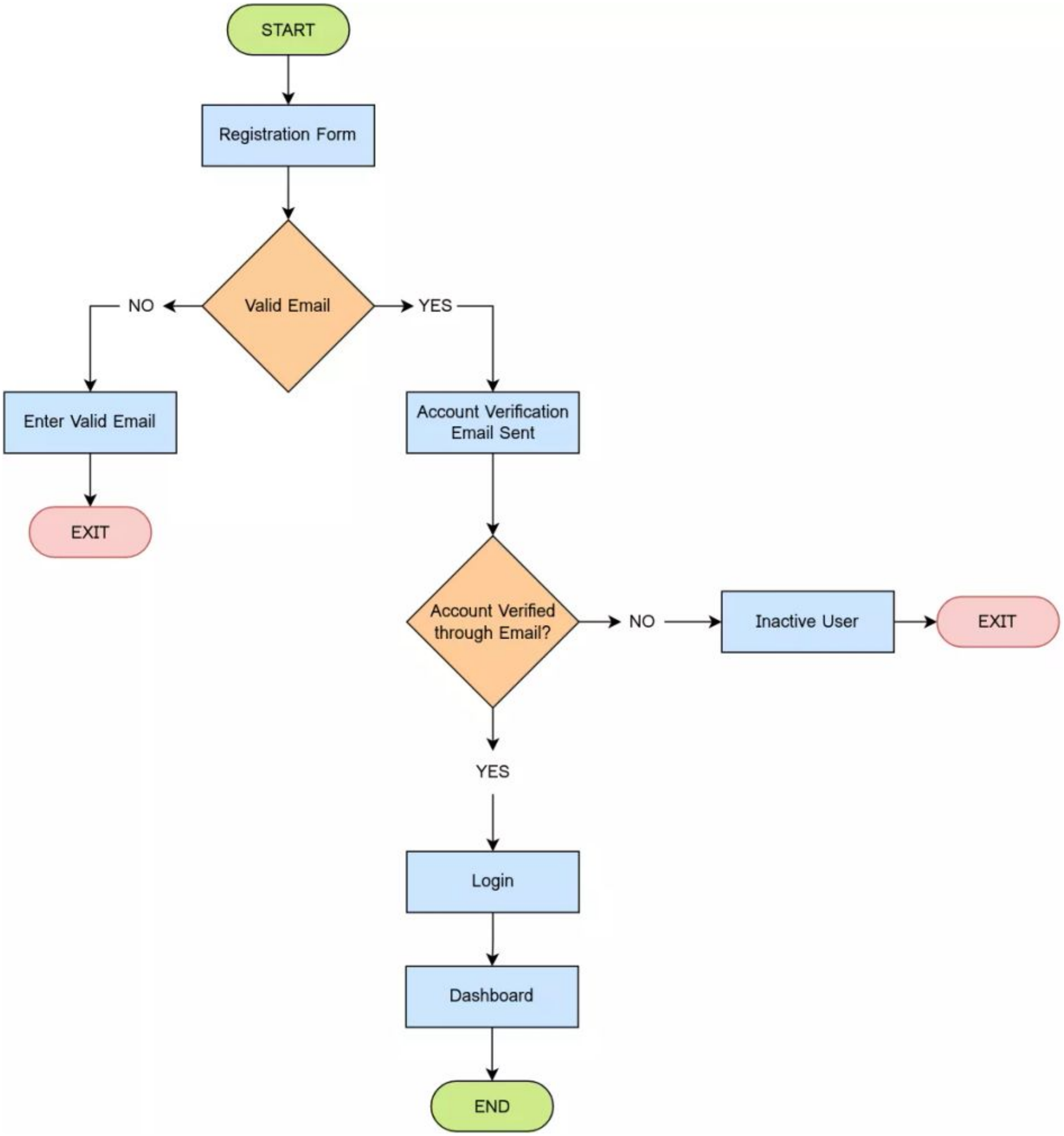
Registration/Signup Module - User Flow Diagram

Email Verification

Email verification is a crucial step in the signup process to ensure the validity and authenticity of the system administrator's accounts. After they provide their email addresses during the signup form, the CRM system implements an email verification mechanism to validate the provided email address. The process of email verification typically involves the following steps:

- Sending Verification Email
    - Upon completing the signup form, the CRM system generates and sends a verification email to the email address provided by the system administrator. This email contains a unique verification link.
- User Notification
    - The system displays a confirmation message to the system administrator, informing them that a verification email has been sent to their provided email address OR verify your user through email before logging in.
    - The system administrator has the time frame of 24 hours to verify that email address. After that, the email would be expired.
    - This message typically includes instructions to check their inbox, including the spam or junk folder if necessary, for the verification email.
- User Action
    - The system administrator is required to open the verification email and click on the provided verification link within a specified time-frame. This action confirms that the email address belongs to the system administrator and enables the system to mark the email address as verified.
- Verification Process
    - When the system administrator clicks the verification link, the CRM system verifies the authenticity of the email address. The system checks whether the provided information matches the records and confirms that the link is valid and has not expired.
- Account Activation

  - Once the email address is successfully verified, the system administrator can be redirected to the page where the platform display the message that “Your Email is successfully verified” and the CRM system activates the system administrator account, granting them access to the system's features and functionalities.
- User flow Diagram



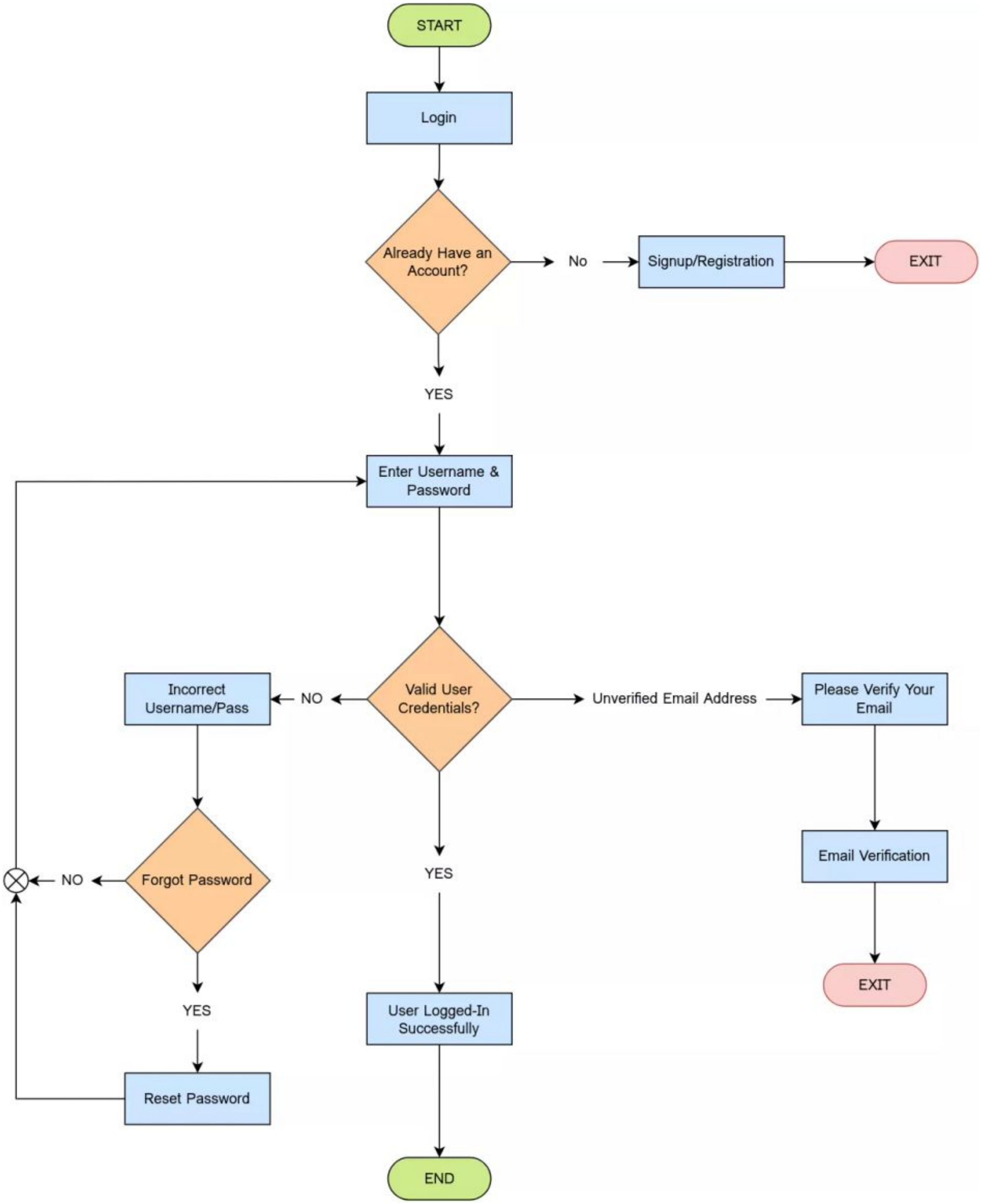
Email Verification Module - User Flow Diagram

Login

This module requires system administrator to provide their username and associated password in order to access their accounts. The login process follows these key steps:

- User Input
  - System administrator needs to enter their username and associated password into the designated login fields on the platform's login page.

- Validation
  - The system verifies the entered username and password against the stored system administrator credentials.
- Successful Validation
  - If the provided username and password are successfully validated, system administrator are granted access to navigate to their Dashboard screen.
- Unverified Email Address
  - In the event that the email address is unverified, the system prompts system administrator to verify their email address.
  - The system administrator has the time frame of 24 hours to verify that email address. After that, the email would be expired. If system administrator have misplaced their verification link, they are given the option to request a new verification link to be sent to their registered email address. This ensures the security and accuracy of account information.
- Failed Validation
  - If the entered username and password do not match the stored credentials. The system displays an appropriate error message to the system administrator. The error message clearly communicates the reason for the login failure, providing guidance on the necessary steps to rectify the issue.
- Unmatched Email Address and Password
  - System administrator are notified that the provided email address and password do not match. They are prompted to re-enter the correct credentials.
- Missing Email Address or/and Password
  - System administrator are notified that the email address or password field is missing. They are prompted to provide the necessary information in order to proceed with the login process.
- “Remember Me” Feature
  - The "Remember Me" feature in the login screen is a functionality that allows users to opt for a convenient way to stay signed in to the CRM system without the need to manually enter their login credentials every time they access the application.
  - When users enable the "Remember Me" feature, the CRM system stores a persistent authentication token or cookie on their device. This token is used to automatically authenticate the user upon subsequent visits to the login screen, bypassing the need to enter their username and password.
- Doesn’t Have an Account
  - If a system administrator lands directly on the login page and it doesn't have the account in the CRM then there is also an option of signup in the login screen.
  - When a user clicks on the "Signup" button, they are redirected to a registration form where they can enter details such as their name, email address, password, and any other required information.
- User Flow Diagram



Login Module - User Flow Diagram

Two-Factor Authentication

By Implementing two-factor authentication (2FA) module using a QR code to log into a Customer Relationship Management (CRM) system is a security measure that adds an extra layer of protection to user accounts. Here's how this process typically works:

- Assign Two Factor Authentication

  - System Admin will be able to enable the Two-Factor Authentication against each pre-defined profiles within the CRM system by navigating to their security settings or preferences.
- Username and Password
  - The user initiates the login process by entering their username and password on the CRM login page.
- User Verification
  - The CRM system verifies the entered username and password against its database to ensure they are correct.
- QR Code Request
  - After successfully verifying the username and password, the CRM system shows the unique QR code that is generated against the session and it will regenerate after each 15 seconds in case of timeout.
- Scanning the QR Code
  - Using the 2FA authentication app, users scan the QR code displayed on the CRM login screen.
- Code Generation
  - Once the QR code is scanned, the 2FA app links to the user's CRM account and begins generating time-based one-time passwords (TOTPs).
- Access Granted
  - If the TOTP provided by the user matches the one generated by the app at that moment, they gain access to their CRM account.

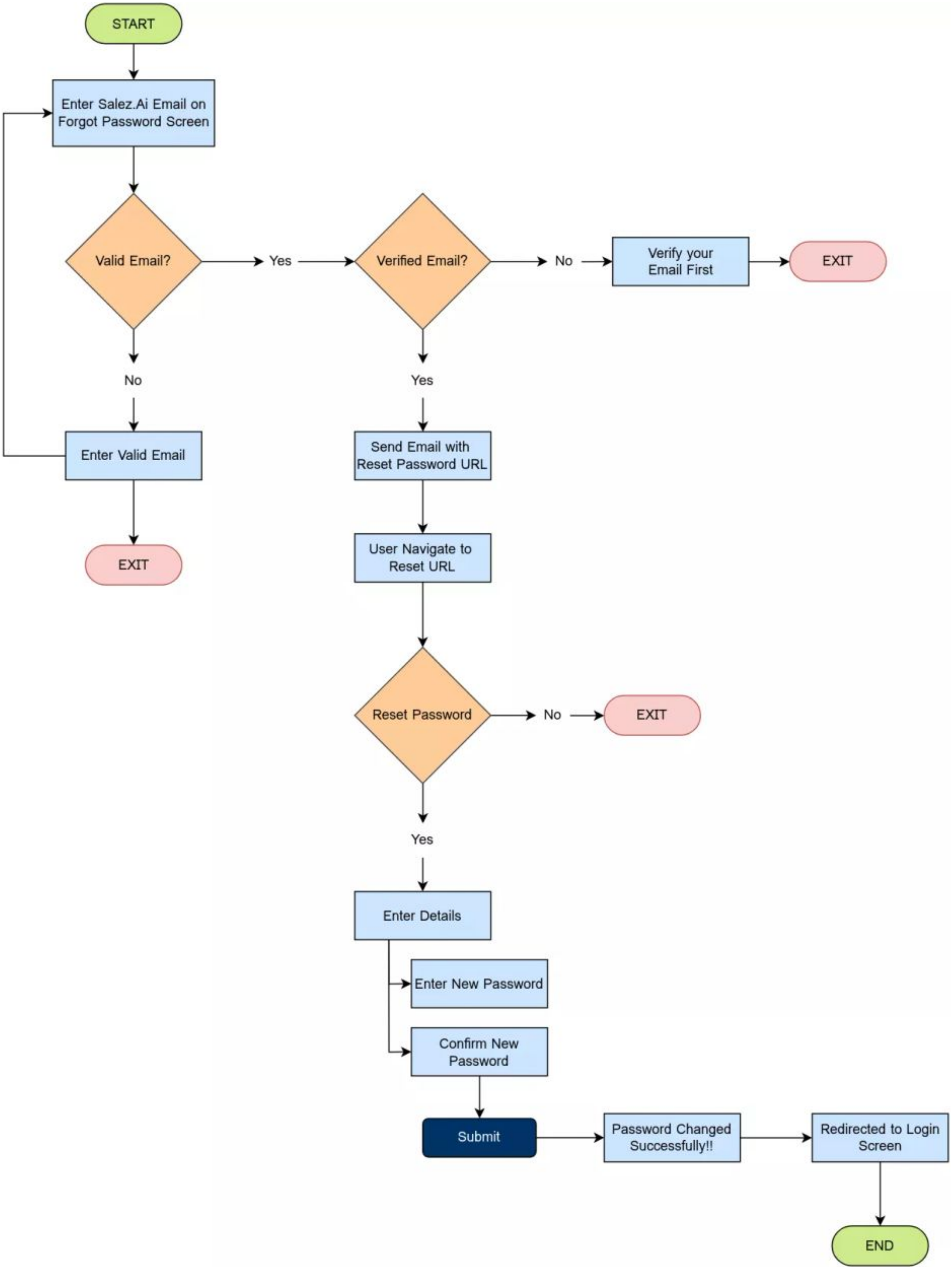
Forgot Password

This module allows system administrator to regain access to their accounts in the event of a forgotten password. The password recovery process follows these key steps:

- Password Recovery Request
  - Navigate to the login screen and clicks on Forgot Password button that leads to page on the platform and initiate a password recovery request by providing their registered email address.
- Email Verification
  - The system verifies the provided email address against the stored system administrator database to ensure its validity and association with an existing account.
- Password Reset Link
  - Upon successful email verification, the system generates a unique password reset link and sends it to the system administrator's registered email address. This link is time-limited up-to 15 minutes to ensure security and prevent unauthorized access.
- Incorrect Email Address
  - In case of an incorrect email address that does not match any existing email addresses stored in the system, an error message will be displayed in the form of a popup. The error message will indicate that the email address entered is incorrect or not found. This notification serves to alert the system administrator that the provided email does not correspond to any registered accounts in the system.
- User Notification
  - System Administrator receives an email containing the password reset link, along with instructions on how to proceed with resetting their password. The email also emphasizes the importance of keeping the password reset link confidential.
- Password Reset Page
  - Clicking on the password reset link button redirects to a secure password reset page on the platform. This page prompts the system administrator to enter a new password.
- New Password Creation
  - System administrator are required to create a new password that meets the platform's password complexity requirements. The password should typically include a minimum number of characters, a combination of uppercase and lowercase letters, numbers, and special characters.
- Successful Password Reset

- Once system administrator submit their new password, the system securely updates their account with the newly chosen password. System administrator are then notified of the successful password reset and prompted to log in using their updated credentials.

- User Flow Diagram

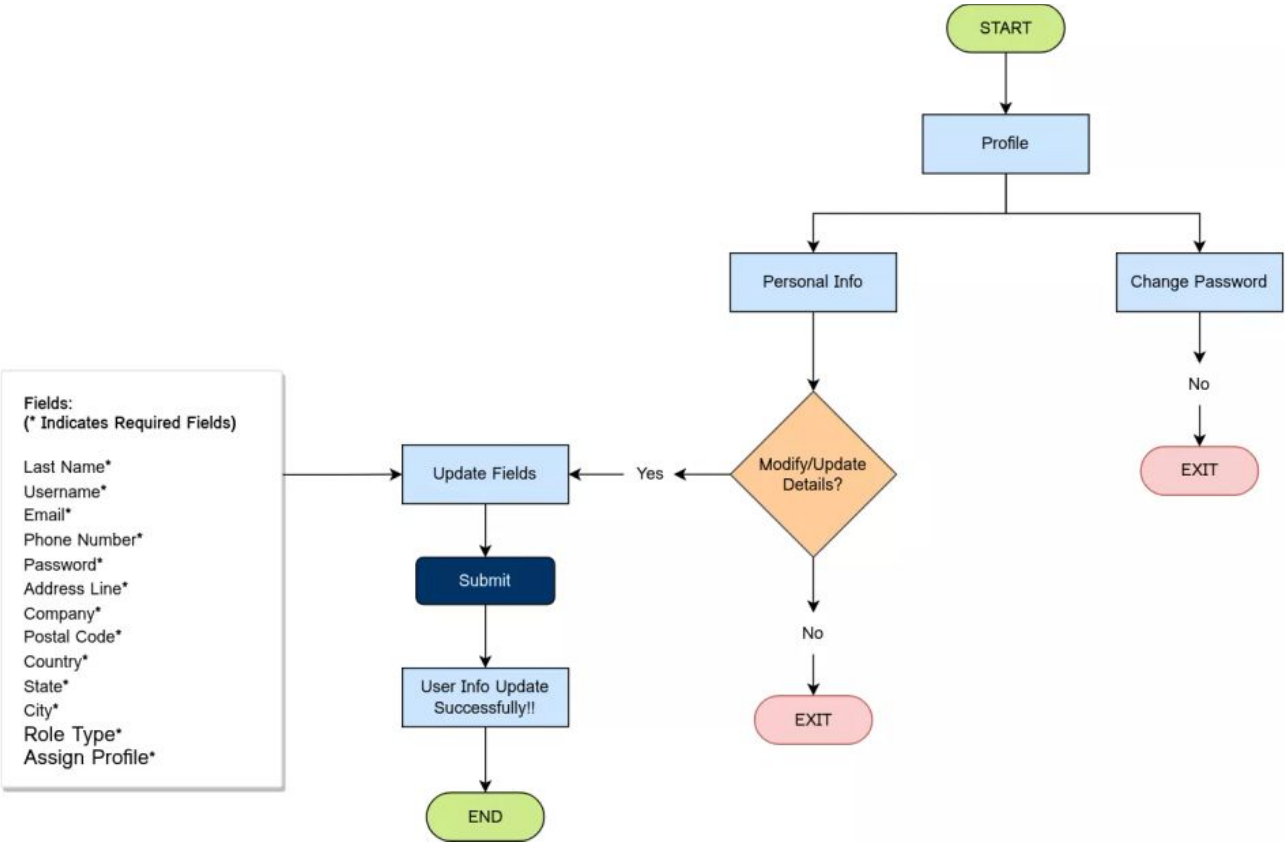


Forgot Password Module - User Flow Diagram

Personal Information

When the System Administrator successfully logs in to their designated dashboard, they will find an option in the top right corner. Under the profile menu, they will be able to manage the following things,

- Manage Profile: View and Edit Personal Details:
    - The "Personal Details" section of the platform empowers administrator to view and modify their personal information for accurate record-keeping and profile management.
    - Within this section, administrator can access and update the following fields such as:
        - First Name
        - Last Name
        - Username (Changes the process of updating username)
        - Email
        - Phone Number
        - Password
        - Address
        - Company
        - Postal Code
        - Country
        - State
        - City
- Logout Feature:
    - The platform provides a Logout feature conveniently located under the profile menu. By selecting this option, the System Administrator can securely log out from their account, ensuring data privacy and enhancing the overall security of the CRM system. This feature offers a simple and effective way for the administrator to end their session and protect sensitive information when necessary.
- User Flow Diagram:

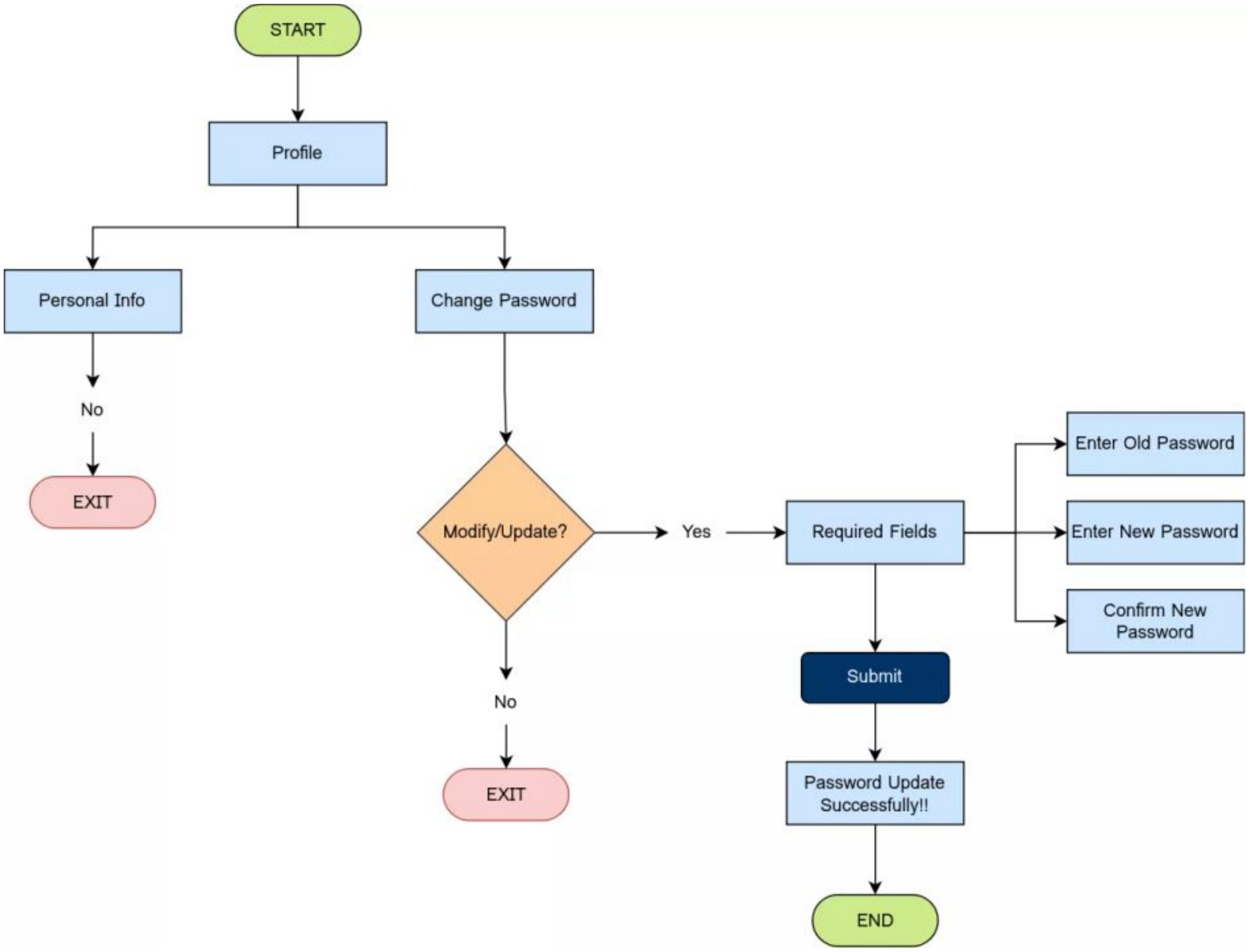


Edit/Update Personal Details - User Flow Diagram

Change Password

When a System Administrator wishes to modify their personal details, including changing the password of their account, the platform provides a user-friendly interface. To change the account password, the System Administrator should navigate to the "Change Password" tab, which is conveniently located next to the "Personal Details" section under the profile drop-down. Following this, they will need to proceed through the following steps:

- Current Password:
  - The System Administrator is required to input their current account password in this field to authenticate their identity.
- New Password:
  - In this field, the System Administrator can enter the new desired password for their account.
  - The new password must meet the platform's specified security requirements.
- Password Confirmation:
  - To ensure accuracy, the System Administrator is prompted to re-enter the new password in this field, confirming that they have typed the correct password.
- User Flow Diagram



Change Password Module - User Flow Diagram

Login History

Under the “Change Password” fields. The system administrator will be able to see their login history that provides administrator with a comprehensive view of their recent login activities. This section displays the following information:

- System Name:
  - The name or description of the system or device used for the login is shown, providing insight into the platform access points.
- Date and Time:
  - The exact date and time of each login activity are recorded, enabling customers to track their account access history.
- IP Address:
  - The IP address associated with each login event is displayed. This information helps customers identify any unauthorized access attempts or suspicious activity.

By providing a transparent Login History, our platform enables administrator to monitor their account security and identify any potential unauthorized access.

Login Session Expired

A login session expiring typically means that the user's authenticated session has ended due to inactivity or a predefined time limit. When a user logs into the CRM, the system generates a session token or identifier that is associated with the user's authentication. This token is used to validate the user's access to the system and maintain their session.

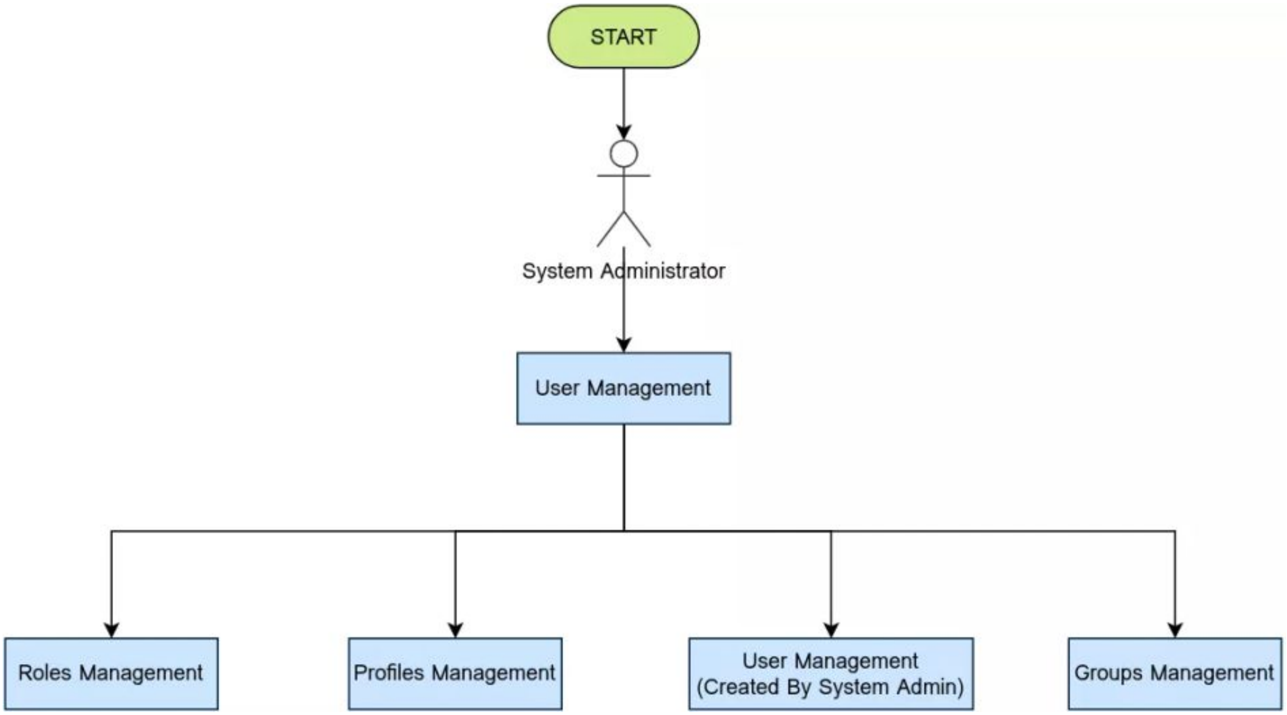
When the login session expires, it means that the session token has expired, and the user is required to re authenticate to regain access to the CRM. This is a security measure to protect the user's account and data in case they leave their session unattended or if there are concerns about unauthorized access.

- User Notification:
  - When a session expires there is a popup that displays the message/error of “Your Session Has Been Expired. Please Login Again!!” indicating that their session has expired. They will need to provide their login credentials again to establish a new session and continue using the CRM system.

User Management

User Management is a vital component of this CRM platform, designed to facilitate efficient administration and control of user accounts. These are the users that are created by the System administrator. It encompasses various features and functionalities that empower administrator to manage user roles, profiles, user lists, and groups effectively. administrator can create and manage these that are mentioned below:

- Roles Management
- Profiles Management
- Users Management
- Groups Management



Roles Management:

The CRM system incorporates a comprehensive Roles Management feature that allows system administrator to see the complete hierarchy and effectively manage the roles within the organization. This feature provides the necessary tools and functionalities to create, assign, modify, and maintain roles, ensuring proper access control and streamlined operations.

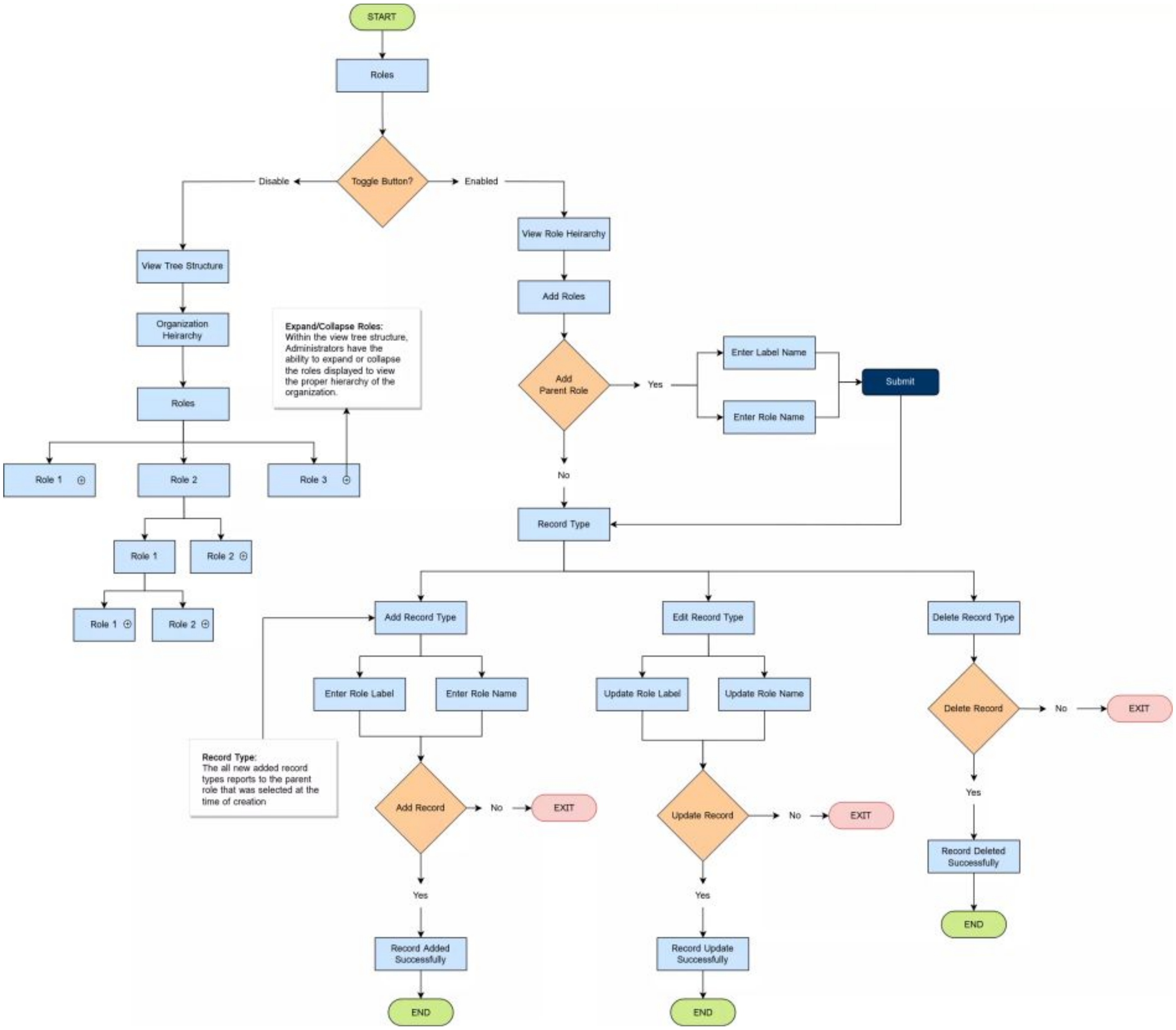
There is a toggle button by which the system administrator can see and manage the “View Tree Structure” OR “View Role Hierarchy”. The Roles Management module consists of the following key aspects:

- **View Tree Structure:** The CRM system incorporates a view tree structure that represents the basic hierarchy of the organization and allows administrator to expand or collapse the roles for clear visualization of the organizational structure and reporting relationships**.**
  - **Basic Hierarchy of Organization:**
    - The view tree structure in the CRM system presents a visual representation of the organization's hierarchy. It showcases the relationships and reporting lines between different roles and individuals within the organization. The hierarchy typically starts with

the highest-level roles, such as the CEO or top-level executives, and extends down to lower-level roles such as employees etc.

- **Expand/Collapse the roles:**
  - Within the view tree structure, administrator can expand or collapse the roles displayed. This feature allows administrator to selectively view or hide specific roles within the hierarchy, depending on their needs or the level of detail required. By expanding a role, administrator can view the individuals associated with that role, their reporting relationships, and any subordinate roles.

- **View Role Hierarchy:**
  - Within the CRM system, the system administrator can view and manage the role hierarchy, which represents the organizational structure and reporting relationships. By accessing the "View Role Hierarchy" feature, they can navigate through the hierarchy through the toggle button and perform various actions related to roles and record types.
    - **Add Parent Role:**
      - To modify the role hierarchy, they can choose to add a parent role by clicking on the "Add Parent Role" option. This action prompts a popup where they can enter the role label and name for the new parent role. These are the details required when the administrator tried to add the parent role. Once the details are entered, Popups come for the success of the addition of a parent role.
    - **Add Record Type:**
      - Another functionality available within the role hierarchy is the management of record types. administrator can add a new record type by selecting the "Add Record Type" option. In the corresponding popup, users can enter the following information:
        - Enter Role Label
        - Enter Role Name
        - Save/Cancel Popup
    - **Delete Record Type:**
      - In addition to adding record types, administrator have the option to delete existing record types. When selecting the "Delete Record Type" option, a validation prompt appears, asking users to confirm the deletion. Users can choose either "Yes" to proceed with the deletion or "No" to cancel the operation.
        - Record Delete Validation (Yes/No)
    - **Modify/Update Record Type:**
      - Furthermore, administrator can update or edit existing record types by selecting the "Update/Edit Record Type" option. This action opens a popup where administrator can modify the role label and name of the record type. In the corresponding popup, they can enter the following information:
        - Update Role Label
        - Update Role Name
    - User flow Diagram:



Roles Management - User Flow Diagram

Profile Management

In the CRM system, the Profiles Management feature empowers system administrator to finely control access permissions related to apps, system configurations, and side menu settings. System administrator create profiles as templates, each pre-configured with specific permissions. These permissions dictate the extent of access and functionality granted to all users linked to these profiles. The Profiles Management module includes the following key functionalities:

Profile Creation

When adding a profile, the following steps and options are available:

- **Enter Profile Name:**
    - To create a new profile in the CRM system, the System Administrator initiates the process by clicking on the 'Add Profile' button.
    - This action triggers the appearance of a modal window, prompting the System Administrator to enter the desired profile name and then proceed with saving it.
        - **Validation:**
            - Profile name must be unique and profile does not create if the profile already exists with the same name. This serves as a label to identify and distinguish the profile from others within the CRM system.
            - If an system administrator attempts to create a profile with a name that already exists in the system, a validation error occurs, and a prompt displays an error message stating "Profile Name should be Unique."

      - The profile name field must be completed and cannot be left empty. When a user attempts to proceed without filling in such a field, the system will prompt the user to provide the necessary information. For instance, if the field is left blank, the system will display a prompt urging the user to enter their name before proceeding.
      - When a user attempts to proceed with adding the blank spaces in the beginning, end or middle of the profile name the a validation error occurs, and a prompt displays an error message.
    - **Successful Profile Creation:**
      - Upon successfully creating a profile, system administrator receive a confirmation message in the form of a popup, indicating that the profile has been successfully added to the system. This notification ensures that system administrator is aware of the successful profile creation and can proceed with further actions.
      - After the profile creation, the system automatically redirects the administrator to the detail page of the newly created profile. From this detail page, he can manage following things,

- **App Settings - Permissions:**

In this section, the System Administrator can assign specific apps to a profile. Once an app is assigned to a profile, all users associated with that profile gain access to various features, including app editing, module management, view customization, view type selection, section and field management, among others. In this section, the System Administrator can efficiently manage the following aspects:

- **Assigned Multiple Apps:**
  - The Administrator navigates to the app assignment section. Within this section, he will find a list of available apps along with check-boxes next to each app name. By selecting the check-boxes for the desired apps, the Administrator can assign those apps to the profile and that apps would be accessible to all the users that are lies under that profile.
    - **By Default (Only One):** By this Feature, administrator can specify that only one default app is assigned to the profile, ensuring a focused user experience.
    - **Visible (Multiple):** administrator can choose to make multiple apps visible to the profile, allowing users assigned to the profile to access and utilize those apps.
- **System Settings - Permissions:**
  - In this section, administrator can configure various permissions related to system settings for the profile. These settings reflects the same to all the users that are associated with that profile. The following options are available within this section:
    - **Allow two-Factor:**
      - System Administrator can enable or disable the two-factor authentication for profiles by clicking the checkbox present next to “Allow Two Factor“ to enhanced security.
      - Enabling the checkbox triggers the display of a QR code.
      - Users will see this QR code on their screen after entering their username and password during their next login, once two-factor authentication is enabled.
      - The QR code is regenerated automatically after a specific duration of time. This periodic regeneration enhances security by providing users with fresh QR codes at regular intervals.
      - Users need to install a 2FA authentication app (e.g., Google Authenticator, Authy, Microsoft Authenticator) on their trusted mobile device to scan the QR code.
    - **Password expire in (Days):**
      - This field display the drop-down menu with these options from which the System Administrator can set the minimum and maximum number of days for password expiration for a specific profile. This policy implements on all the users associated with the selected profiles on which the system administrator enables this feature:
        - 30 days
        - 60 days
        - 90 days
        - 180 days
        - One year
        - Never Expires

  - **Password Expiration Policy:** System Administrator can configure password expiration policies for different profiles. For instance, they can set a policy that requires users to change their passwords every 90 days.
  - **User Login:** Let's say a user logs in for the first time with their initial password. The CRM system recognizes that this password has an expiration policy and calculates the date when it will expire based on the policy settings.
  - **Notification Period:** Salez.Ai typically provides users with a notification period before their password expires. This is often set a few days before the actual expiration date, for example, one day. During this notification period, if a user logs in (let's say on the 89th day since their last password change), they will receive a notification.
  - **Password Change Process:** When the user follows the link or prompt, they are taken to a password change page. Here, they must enter their current password (the one that's about to expire) and then create a new, secure password that meets the organization's password policy requirements.
  - **Successful Change:** Once the user successfully changes their password, they can continue to access Salez.Ai as usual with the new password.
  - **Expired Password:** If the user does not change their password during the notification period and the password expires, they will not be able to log in. They'll be locked out of their account until they follow a password reset process, they will see the modal at the time of the login to their account. From this modal, he can clicks on the change password link and redirect to the “Reset Password“ page to setup the new password with the following fields,
    - Enter New Password
    - Confirm New Password
  - **New Expiration Date:** If password expiration policy is set for 90 days, and the user change his password on the 30th day, then new password's expiration date should be same as per the 90 days policy. The password will expire after every 90 days either the user change his password in this duration or not.
- **Invalid login attempt:**
  - administrator can define the minimum and maximum number of invalid login attempts allowed for each profile. These login attempts validation implements on all the users associated with that profile. After exceeding this limit, they may be locked out of their accounts temporarily and user state would be converted into “isFreeze“ status. They needs to contact the administrator to regain the access again.
  - This field display the drop-down menu that contains the following number of attempts that are allowed to try. The invalid login attempts that are display in the drop-down menu are,
    - 3
    - 5
    - 10
    - No Limits
- **Minimum password length:**
  - The System Administrator can specify the minimum and maximum required length for passwords associated with the profile, ensuring adherence to password security best practices. The same validation implements on all the users associated with that profile.
  - This fields shows the drop-down menu and the options available in the drop-down menu are,
    - 8 characters
    - 12 characters
    - 16 characters
  - Validations:
    - The password format includes a minimum of 8 characters and maximum of 16 characters, at least 1 uppercase letter, 1 lowercase letter, 1 number, and 1 special character.
    - If the system administrator sets the maximum password length for a profile to 16 characters, all users associated with that profile must follow this validation.
    - If the administrator later changes the validation to 8 characters, this rule will apply to all new users signing up for the CRM.

        - Existing users with 16-character passwords can still log in, but if they want to change their password, they must adhere to the new 8-character validation.
    - **Report create:**
      - administrator can grant or restrict the ability to create reports assigned to the profile by enabling or disabling this option.
    - **Report run:**
      - administrator can determine whether profiles can run reports or not by enabling or disabling this option.
    - **Edit Mode Access:**
      - administrator possess the capability to control access to the Edit Mode Screen for specific profiles by toggling a checkbox.
      - Enabling the checkbox grants the profile access to the Edit Mode Screen of the corresponding app, whereas disabling the checkbox restricts this access. When the checkbox is disabled, the toggle button for entering the Edit Mode Screen becomes unavailable for that particular profile.
- **Side Menu Settings (Assigned items in the side menu):**
  - In profile management, administrator can access the Side Menu Settings section, where they will find a list of menu items corresponding to various functionalities and features.
  - The Administrator can easily restrict the users that are associated with the profiles to a certain level of permissions and visibility by using the check box that is shown against each menu item in the Side Menu Settings
  - When a checkbox is selected, it indicates that the corresponding menu item is visible and accessible to the user associated with that profile. Conversely, when a checkbox is deselected, it restricts the visibility and access of that menu item for all that users that belongs to that profile.
  - The menu items that can be managed in the Side Menu Settings section using the Checkbox includes:
    - Apps
    - Dashboard
    - User Management
      - User List
      - Profiles
      - Roles
      - Groups
  - Setting
    - App settings
    - Web to lead
    - Lead Mapping

<u>List All Profiles</u>

The CRM system provides a comprehensive feature to list all profiles within the platform. When accessing the "List All Profiles" section, system administrator is presented with a table or list displaying the profiles. The following information is typically included for each profile:

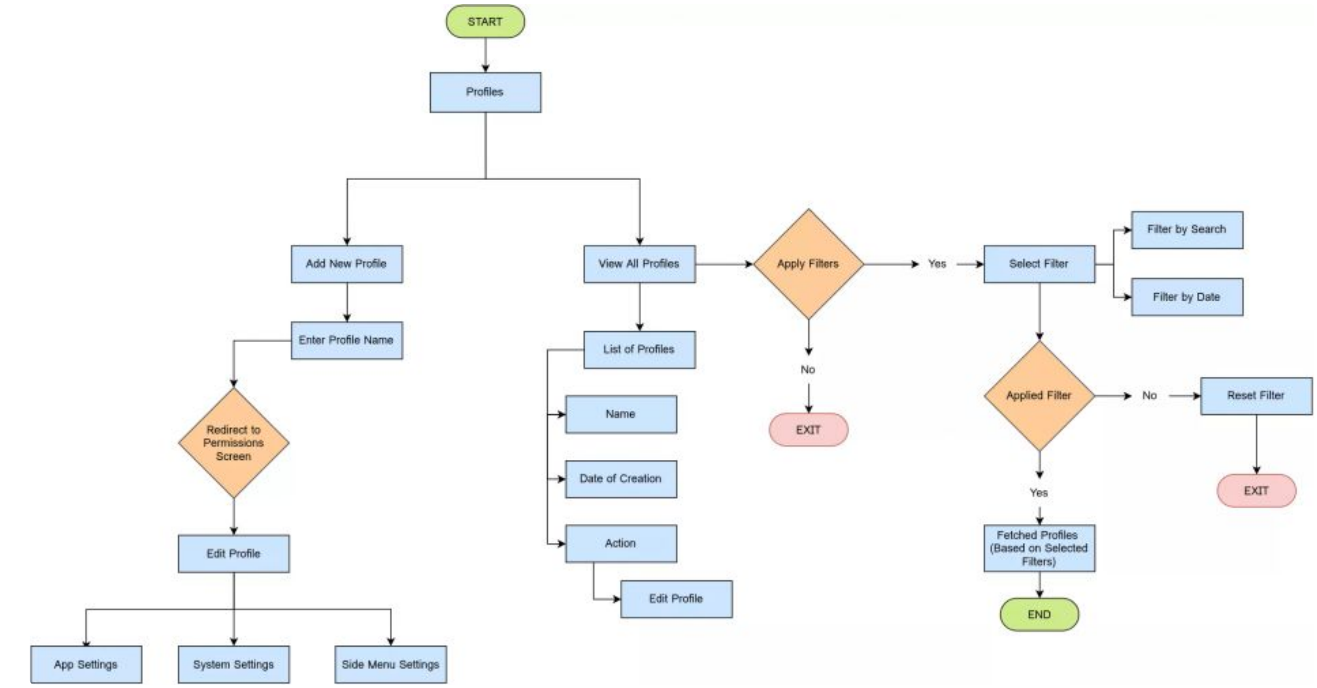
- **Date of Creation:**
  - This column displays the date on which the profile was created by the system administrator. It provides them with a reference point for understanding the timeline of profile creation.
- **Name:**
  - The name column showcases the unique identifier or label assigned to each profile. It helps system administrator quickly identify and differentiate between different profiles.
- **Action (Update & Modify Profile):**
  - Under the action column, system administrator can perform various actions specific to each profile. These actions typically include options to update or modify settings associated with the profile. For each profile, The system administrator has the option to updates the following settings and permissions:
    - App Settings

            - Updated Assigned Apps
        - System Settings
            - Allow two-Factor
            - Password expire in (Days)
            - Invalid login attempt
            - Minimum password length
            - Report create
            - Report run
            - Edit Mode Access
        - Side Menu Settings
            - The menu items that can be managed in the Side Menu Settings section using checkboxes include:
                - Apps
                - Dashboard
                - User Management
                    - User List
                    - Profiles
                    - Roles
                    - Groups
                - Setting
                    - App settings
                    - Web to lead
                    - Lead Mapping

Filters

- **Search Filters**
    - The CRM system incorporates a powerful filtering feature that allows administrator to refine their search and retrieve specific profiles based on various criteria. The Filters functionality within the CRM system includes the following options:
        - Filter By Name
            - The System Administrator can apply a name filter to search for profiles by entering specific keywords or names associated with the profiles. This filter typically provides an input field where they can enter the desired name or keyword to narrow down the search results.
        - Filter By Date
            - The CRM system offers a date filter that allows administrator to filter profiles based on the date of creation. This filter is typically facilitated through a calendar interface where they can select a specific date or a range of dates to filter the profiles accordingly.
        - Reset Filter
            - To clear all applied filters and start a new search, administrator can utilize the "Reset Filter" option. This function removes any previously set filters and resets the profile list to its original state, enabling them to perform a fresh search without any applied filters.

Userflow Diagram:



User List Management

User List Management in the CRM system refers to the functionality that allows administrator or authorized users to view, organize, and manage the list of users within the platform. It provides a centralized view of all users and their associated details, facilitating efficient user administration and access control. The User List Management typically includes the following features:

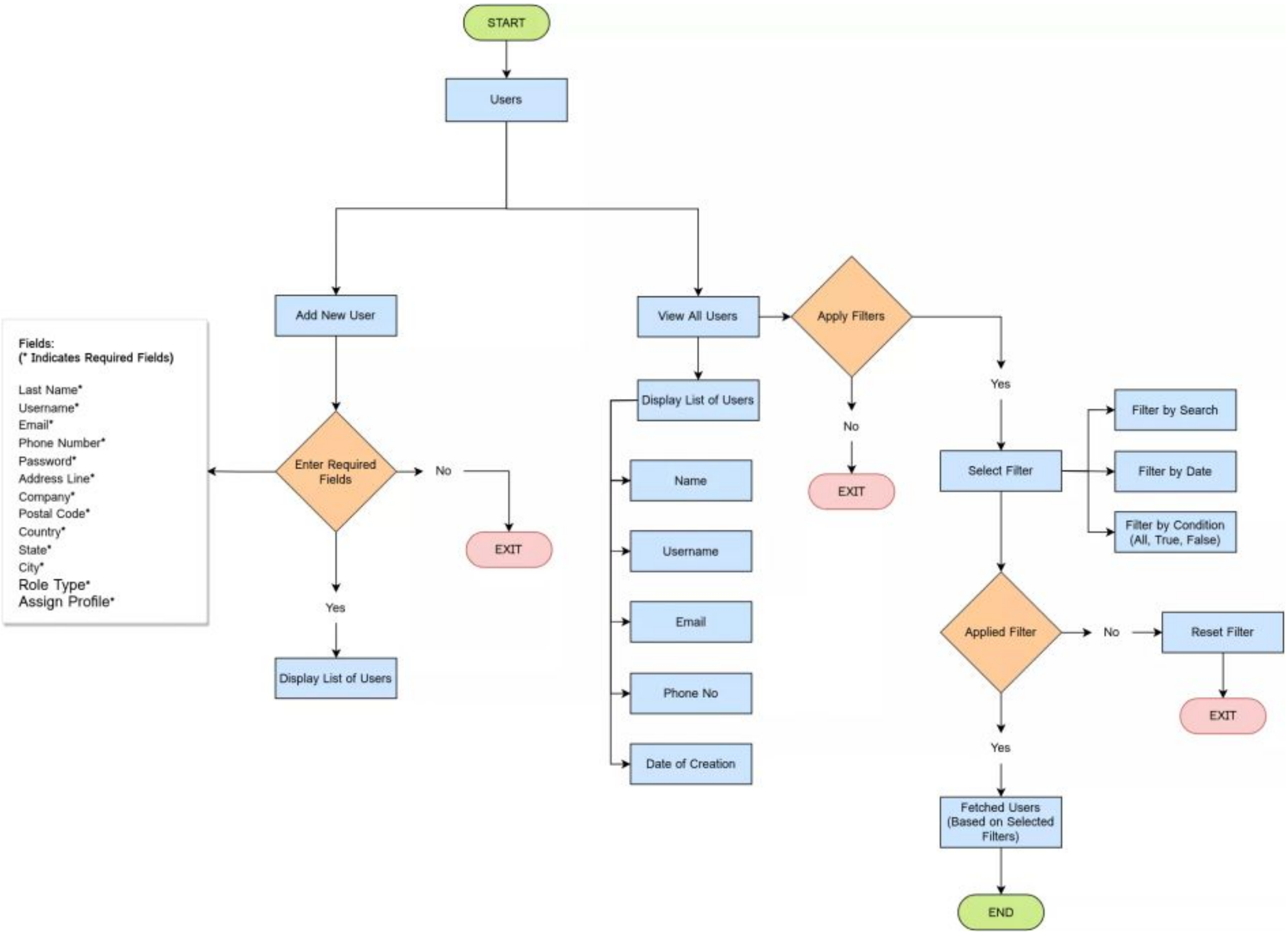
- **Search Filters**
  - User List Management in the CRM system includes various filters and options to effectively manage and search for users. The following features are available:
    - **Filter By Name:**
      - administrator can apply a name filter to search for specific users by entering specific keywords or names associated with the users. This filter typically provides an input field where users can enter the desired name or keyword to narrow down the search results.
    - **Filter By Date:**
      - The CRM system offers a date filter that allows users to filter users based on the date of creation. This filter is typically facilitated through a calendar interface where Admins can select a specific date or a range of dates to filter the profiles accordingly.
    - **By All:**
      - This option allows admin to view all user profiles without any specific filtering criteria. Within the "By All" filter option, users have additional sub-options to further refine their search:
        - **All:**
          - This option displays all user profiles, regardless of their verification status.
        - **Verified:**
          - This option shows only the user profiles that have been verified.
        - **True:**
          - This option filters the user profiles to display only those with a "true" status based on a specific attribute or condition.
        - **False:**
          - This option filters the user profiles to display only those with a "false" status based on a specific attribute or condition.
    - **Reset Filter:**

            - To clear all applied filters and start a new search, users can utilize the "Reset Filter" option. This function removes any previously set filters and resets the profile list to its original state, enabling users to perform a fresh search without any applied filters.

- **List All Users (Created By Admin)**
    - The CRM system provides a comprehensive list of all users created by the administrator. This user list displays important details for each user profile, including
        - **Name:**
            - The name of the user, which could include the first name and last name.
        - **Username:**
            - The unique username associated with the user's account. This is used for authentication and login purposes.
        - **Email:**
            - The email address registered for the user's account. This serves as a primary contact method for communication.
        - **Phone Number:**
            - The phone number provided by the user during registration. This contact information allows for direct communication if required.
        - **Date of Creation:**
            - The specific date when the user profile was created in the CRM system. This information helps in tracking the timeline of user registrations.
        - **Verified:**
            - It indicates whether a user's email address has been verified or not. This field serves as a status indicator to determine if the user has completed the email verification process.
        - **Freeze:**
            - There is a "Freeze" field that allows administrator to see the statuses of the user accounts whether they are frozen or not. If the user can exceed the number of the Invalid login attempts then their accounts would be temporarily frozen. The "Freeze" field serves as a control mechanism to temporarily restrict the functionality or access of a user account.
        - **Actions:**
            - **View:**
                - The "View" action allows administrator to access and view the details of a specific user account. By selecting the "View" option, administrator can retrieve information such as the user's name, email address, phone number, role, and other relevant details.
            - **Edit:**
                - The "Edit" action enables administrator to modify and update the information associated with a user account. By selecting the "Edit" option, administrator gain access to an editable form or interface where they can make changes to fields such as the user's name, email address, phone number, role, and other relevant details.
- **Add New User**
    - To streamline the process of adding new users to the CRM system, an intuitive interface is provided. When adding a new user, the following fields are required to be completed:
        - First Name
        - Last Name
        - Username
        - Email
        - Phone Number
        - Password
        - Address Line
        - Company
        - Postal Code

        - Country
        - State
        - City
        - **Role Type:**
            - The assigned role for the user, chosen from a list of available roles fetched from the system.
        - **Assign Profile:**
            - The selected profile to assign to the user, chosen from a list of available profiles fetched from the system.
            - The access and permission that are implemented on the profiles will be implement on all the users when the system administrator select the specific profile from here.

Userflow Diagram:



User List Management - User Flow Diagram

Group Management

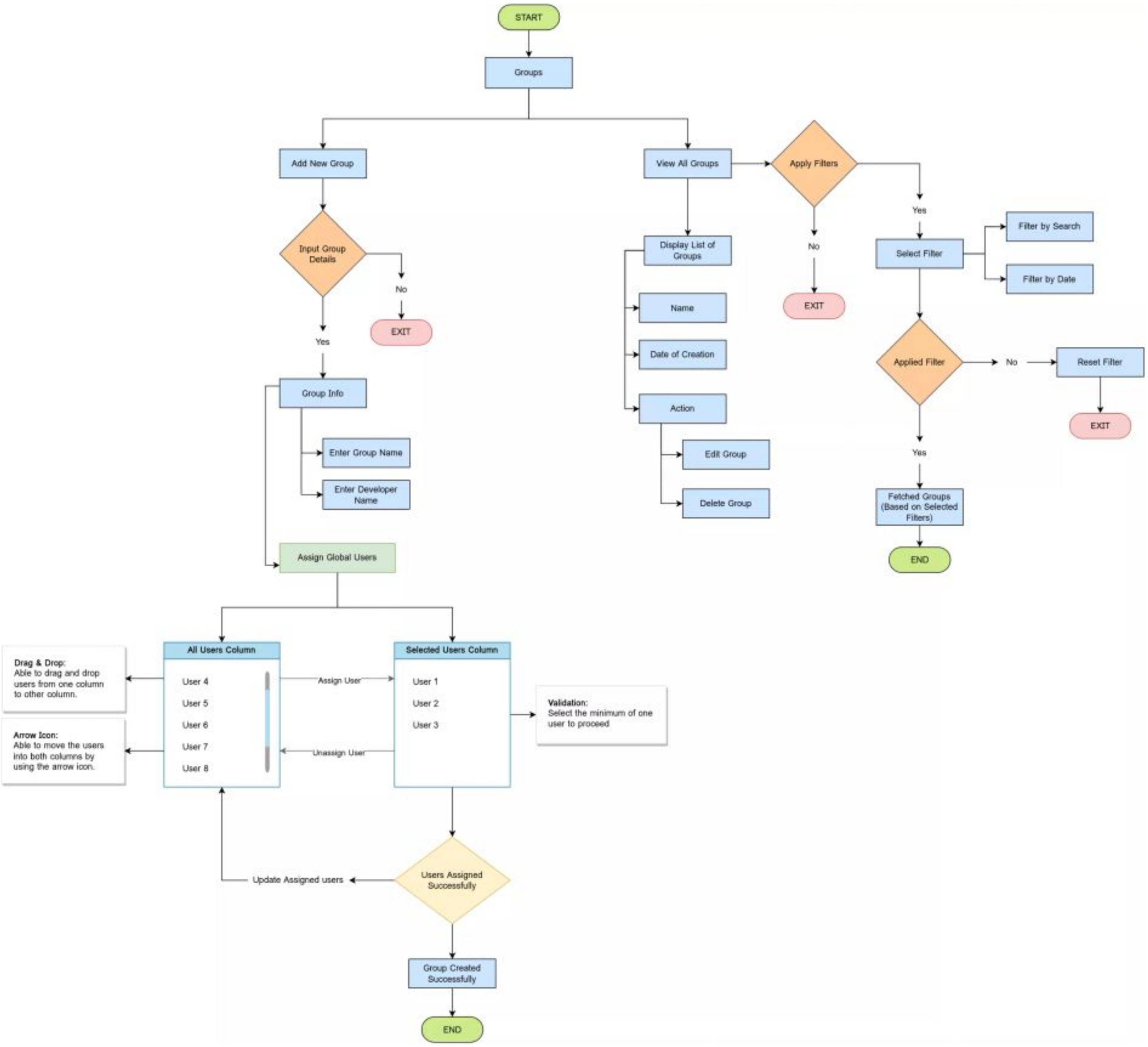
The CRM system refers to the capability of creating, organizing, and managing groups within the platform. A group is a collection of users or entities with shared characteristics, allowing for easier management and collaboration. Group Management provides administrator and users with the ability to create, modify, and delete groups, as well as assign members to these groups.

- **Search Filters**
    - In the CRM system, the Groups Management feature allows users to organize and manage groups effectively. To enhance the usability of this feature, the system provides various filters to facilitate easy searching and filtering of groups. The available filters include
        - Filter By Name:

      - This filter allows users to enter specific keywords or names associated with groups in an input field. It helps narrow down the search results and retrieve groups with matching names.
    - Filter By Date:
      - The CRM system enables users to filter groups based on the date of creation. By using a calendar interface, users can select a specific date or a range of dates to filter the groups accordingly. This is particularly useful when searching for groups created within a specific time frame.
    - Reset Filter:
      - The "Reset Filter" option allows users to clear any applied filters and revert to the default state of the group list. It helps users start a fresh search or remove any unintended filters.
- **All Groups List**
  - In the CRM system, the Groups Management feature provides a comprehensive list of all groups created by the administrator. The list includes essential details for each group, such as:
    - The Group Name
    - The Date of Creation.
  - Additionally, actions are available for administrator to perform on each group in the list. These actions typically include editing/updating the group and deleting it if necessary.
- **Edit/Update Group:**
  - When selecting the Edit/Update action for a group, administrator can modify various aspects of the group's configuration. The following options are commonly available for updating a group:
    - Update Group Name:
      - administrator can modify the name of the group by entering a new value in the input field. This allows for changes to better reflect the purpose or attributes of the group.
    - Update Developer Name:
      - Similarly, administrator can update the developer name associated with the group by entering a new value in the input field. This field might be used for internal reference or identification purposes.
    - Update Users:
      - To add users to the group, administrator can utilize a Kanban-style interface. The interface consists of two columns:
        - All Users Column:
          - This column displays a list of all users created by the administrator. It provides an overview of the available users that can be added to the group.
        - The Selected Users column:
          - administrator can drag and drop users from the All Users Column to the Selected Users Column. This action includes the selected users in the group.
        - Validation:
          - A validation is in place to [ensure that at least one user is added to the group]
- **Delete Group:**
  - The Delete action allows administrator to remove a group from the system. A validation process is implemented to confirm the deletion, ensuring that the action is deliberate and preventing the accidental removal of a group.
- **Add Group**
  - The CRM system includes an Add Group feature that allows administrator to create new groups within the platform. When adding a group, administrator are prompted to provide the following information:
    - **Group Name:**
      - administrator enter the desired name for the group in the provided input field. This name serves as a unique identifier for the group.
    - **Developer Name:**

        - Similarly, administrator enter the developer name for the group in the input field. The developer's name may be used for internal reference or identification purposes.
    - **Update Users:**
        - To assign users to the newly created group, a Kanban-style interface is utilized. The interface consists of two columns:
            - **All Users Column:**
                - This column displays a list of all users created by the administrator. It provides an overview of the available users that can be added to the group.
            - **Selected Users Column:**
                - administrator can drag and drop users from the All Users Column to the Selected Users Column. This action includes the selected users in the group.
            - **Validation:**
                - A validation is implemented to ensure that at least one user is added to the group before proceeding.

Userflow Diagram:



Group Management - User Flow Diagram

Settings

App Settings

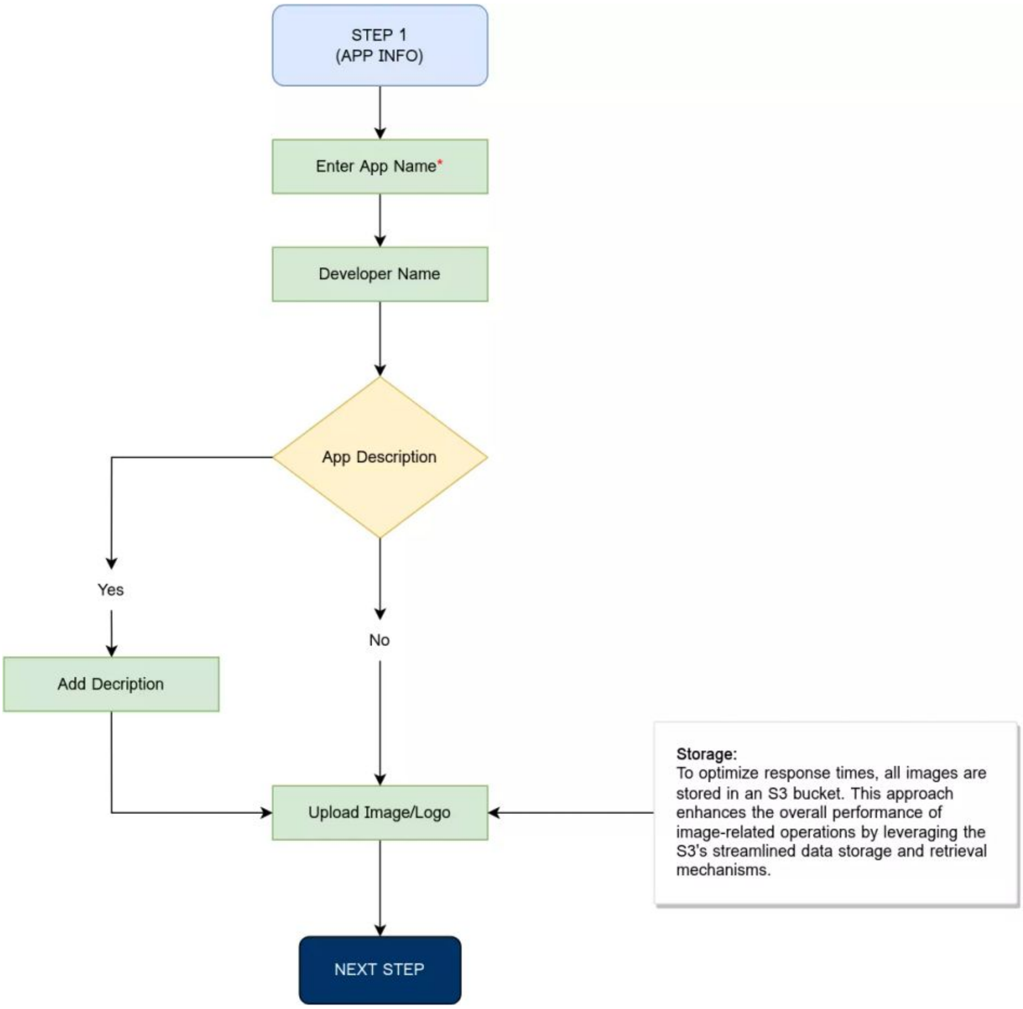
In CRM, the App View feature allows administrator to manage and interact with different apps created within the platform. The feature provides a list of all the apps available in the system. administrator have several actions they can perform on each app, including Edit, Clone, and Delete.

- **Apps View**
  - By utilizing the App View feature, administrator can efficiently manage the apps within the CRM system. They can edit app settings to customize functionality, clone apps for streamlined app creation, and delete apps when they are no longer needed. This enables administrator to effectively tailor the CRM platform to meet the specific requirements of their organization.
    - **List All Apps:**

      This feature in the CRM system provides administrator with an overview of all the apps available within the platform. It presents a comprehensive list of the apps that have been created and configured for use. The purpose of this feature is to provide administrator with easy access to the apps and facilitate efficient app management. Each app is typically accompanied by three options that can be performed on the app. These options include:

      - Edit App
      - Clone App
      - Delete App
- **App Creation:**
  - The creation of an app allows businesses to tailor their CRM system to their specific needs, enhancing productivity and efficiency in managing customer relationships and business processes. There are total of five basic steps to create an app within a CRM system, you can follow these basic steps:
    - **Step 1 (App Info)**
      - The first step in creating an app within the CRM system involves providing the necessary App Info. The System Administrator is required to fill in specific details in the input fields during this step. (* Indicates Required Fields)
        - App Name*
          - The System Administrator needs to enter a unique name for the app.
          - The System Administrator needs to enter the app name while considering the validation rules.
            - **Validation:** There is a validation rule that allows only alphabets, numbers, and underscores. Spaces and special characters are not permitted in the app name because the developer name will then be auto-generated based on the app name entered.
          - The chosen name serves as an essential identifier for the app within the CRM system. A well-chosen app name not only facilitates easy navigation and recognition but also provides users with a clear understanding of the app's role and significance.
        - Developers Name*
          - This field typically auto-generates based on the app name entered.
            - **Validation:** Only Alphabets and Numbers with underscore allowed no spaces
        - App Description (Optional)
          - The System Administrator is required to provide a short introductory description of the app. This description offers a brief overview of what the app is about and its main features or functionalities.
          - It helps to gain a quick understanding of the app's purpose and potential benefits.
        - App Image/Logo*
          - The System Administrator is required to upload an app image/logo. This serves as a visual representation of the app and helps administrator to easily locate and recognize the app, improving navigation and usability within the CRM system.
          - When the administrator uploads an image there is a button that is typically provided at the top corner of the image. This cross button serves as a delete or remove option for the uploaded image.

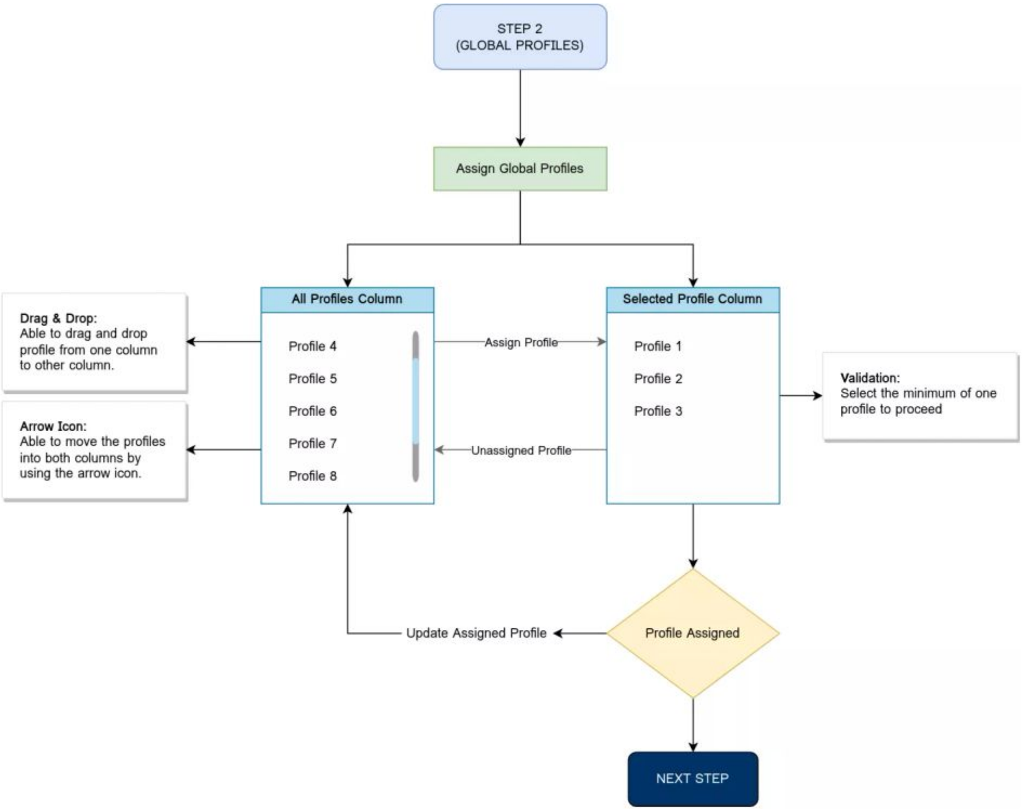
        - If the administrator wishes to delete the uploaded image and replace it with another image, they can simply click on the cross button. This action triggers the removal of the current image from the system.
        - To optimize response times, all images are stored in an S3 bucket. This setup ensures that when the system administrator adds or updates images, the retrieval process benefits from the efficient S3 infrastructure, leading to reduced response times. This approach enhances the overall performance of image-related operations by leveraging the S3's streamlined data storage and retrieval mechanisms.
    - User Flow Diagram


STEP 1
(APP INFO)
Enter App Name*
Developer Name
App Description
Yes
No
Add Decription
Upload Image/Logo
Storage:
To optimize response times, all images are stored in an S3 bucket. This approach enhances the overall performance of image-related operations by leveraging the S3's streamlined data storage and retrieval mechanisms.
NEXT STEP

Step 01 - App Info

- **Step 2 (Global Profiles)**
    - The Administrator will be able to assign the profiles to the app in this step. The Global Profiles feature in the CRM system enables administrator to add the details and configurations of a new app, including the assignment of profiles. When creating an app, the Global Profiles feature provides a Kanban-style interface to manage and assign profiles to which that particular app would be visible and have the permissions based on that. The interface includes two columns:
        - **All Profiles Column:**
            - This column displays a comprehensive list of all the profiles available in the CRM system.
            - It allows administrator to review and select profiles that are relevant to the app being created.
            - The list provides an overview of the available profiles, ensuring that administrator have a comprehensive range of options to choose from.
            - administrator can drag and drop the profiles from the All Profiles Column to the Selected Profiles Column.
            - administrator can also move the profiles into the both columns respectively by using the right and left arrows present next to each profile as per the column in which the profile exists.

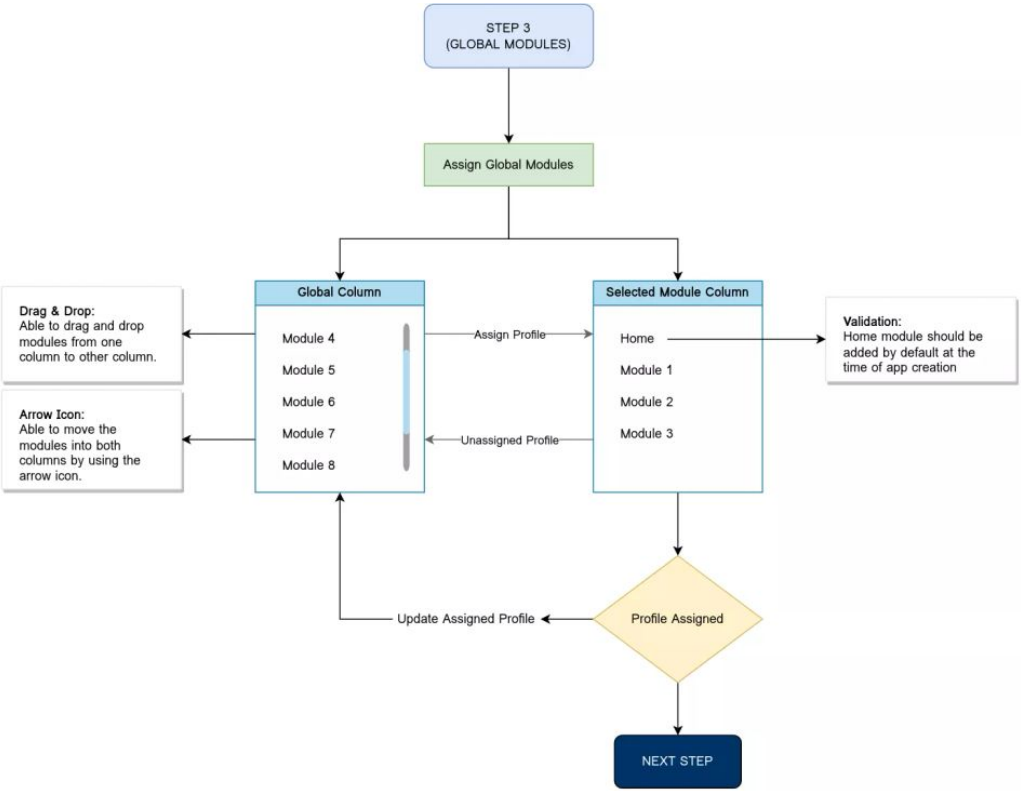
- **Selected Profiles Column:**
  - By this the administrator can select the profiles that he wants to assign with that app.
  - administrator can drag and drop the profiles from the All Profiles Column to the Selected Profiles Column.
  - administrator can also move the profiles into the both columns respectively by using the right and left arrows present next to each profile as per the column in which the profile exists.
  - This action assigns the selected profiles to the app being created. The profiles listed in the Selected Profiles Column represent the profiles that are currently associated with the app.
    - **Validation:** A validation is implemented to ensure that at least one profile is selected before proceeding.
- User Flow Diagram



Step 02 - Global Profiles

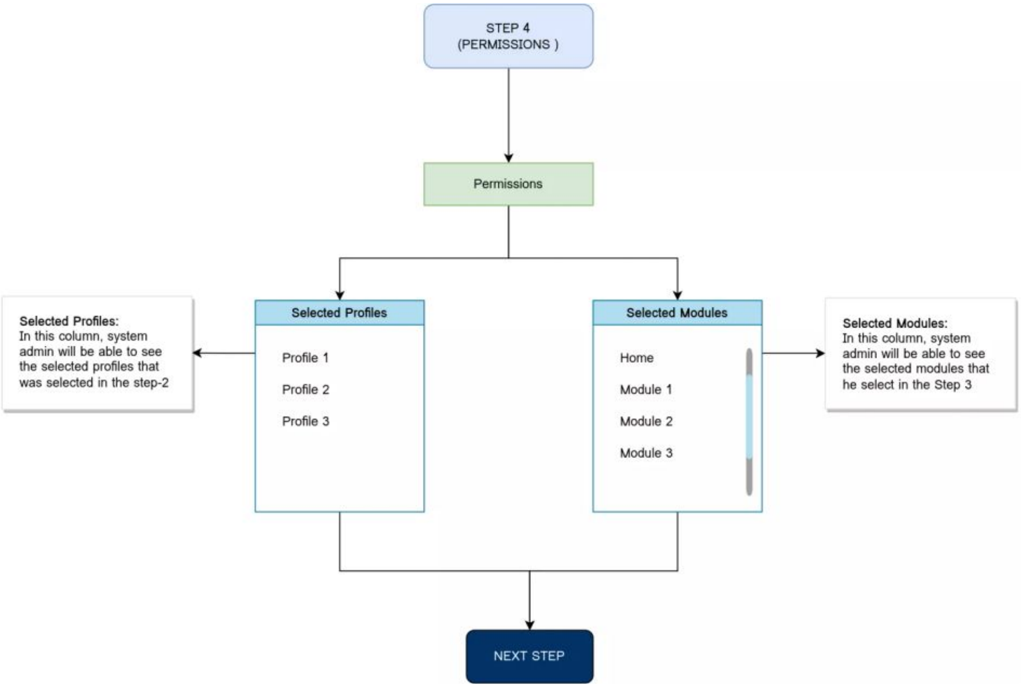
- **Step 3 (Global Modules)**
  - This step of the app creation process allows administrator to add and manage modules within a specific app that is being created. Using a Kanban-style interface, administrator can easily select and add modules to the app. The Global Modules interface consists of two columns:
    - **All Modules Column:**
      - This column displays a comprehensive list of all available modules in the CRM system.
      - administrator can review the list to identify the modules that are relevant to the app being created or updated. It provides an overview of the available modules, ensuring administrator have a wide range of options to choose from.
      - administrator can also move the modules into the both columns respectively by using the right and left arrows present next to each profile as per the column in which the module exists.
    - **Selected Modules Column:**
      - administrator can drag and drop modules from the All Modules Column to the Selected Modules Column.
      - administrator can also move the modules into the both columns respectively by using the right and left arrows as per the column present next to each profile in which the module exists.
      - This action assigns the selected modules to the app, indicating that those modules are included in the app's functionality.

            - The Selected Modules Column displays the modules that have been selected for the app.
            - **Validation:** A validation is implemented to ensure that at least one module is selected before proceeding.
        - **Order Selection:**
            - System administrator possess the ability to manage the display order of selected modules within the context of the app's edit mode. This is the same order for the modules followed when the system administrator sees these modules in the Edit Mode Screen.
            - By transferring modules from the "All Modules" column to the "Selected Modules" column, administrator can establish a preferred order for the displayed modules.
            - This process involves a straightforward drag-and-drop mechanism, enabling administrator to arrange modules as desired, specifying their positions, and enhancing the overall user experience of module navigation and interaction.
                - i.e System Administrator moves the three modules from the all Modules Columns to the Selected Module Column. Now he is able to change the order for the selected modules like which is on first place, second place and so on by simply just dragging the column to their respective place.
        - User Flow Diagram



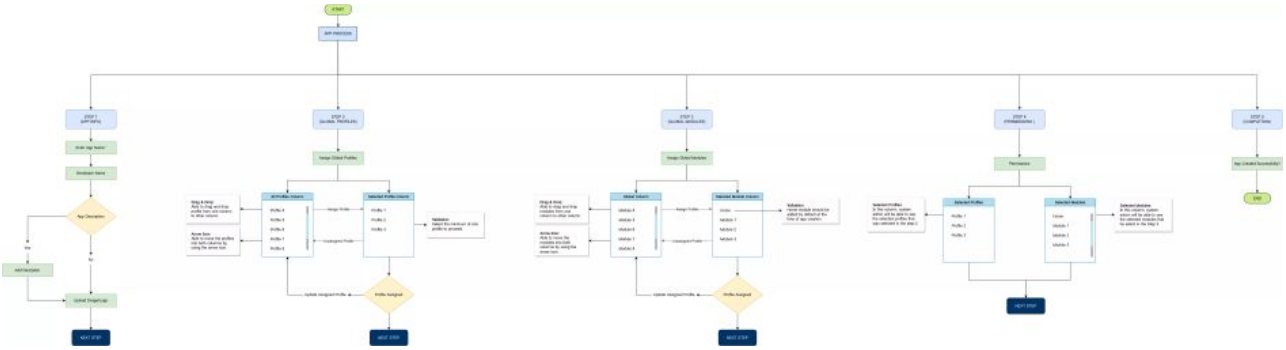
Step 03 - Global Modules

- **Step 4 (Permissions)**
    - In this step, the system administrator initially encounters a list of selected profiles within the “Selected Profiles” column alongside with the list of selected modules in the “Module” column.
    - User Flow Diagram:


STEP 4
(PERMISSIONS)
Permissions
Selected Profiles:
In this column, system admin will be able to see the selected profiles that was selected in the step-2
Selected Profiles
Profile 1
Profile 2
Profile 3
Selected Modules
Home
Module 1
Module 2
Module 3
Selected Modules:
In this column, system admin will be able to see the selected modules that he select in the Step 3
NEXT STEP

Step 04 - Permissions Screen

- **Step 5 (Completion/Success):**
  - When the system administrator presses the complete button then the popup modal opens and a notification appears immediately after the app is successfully created, serving as visual feedback to the user.
- Userflow Diagram:

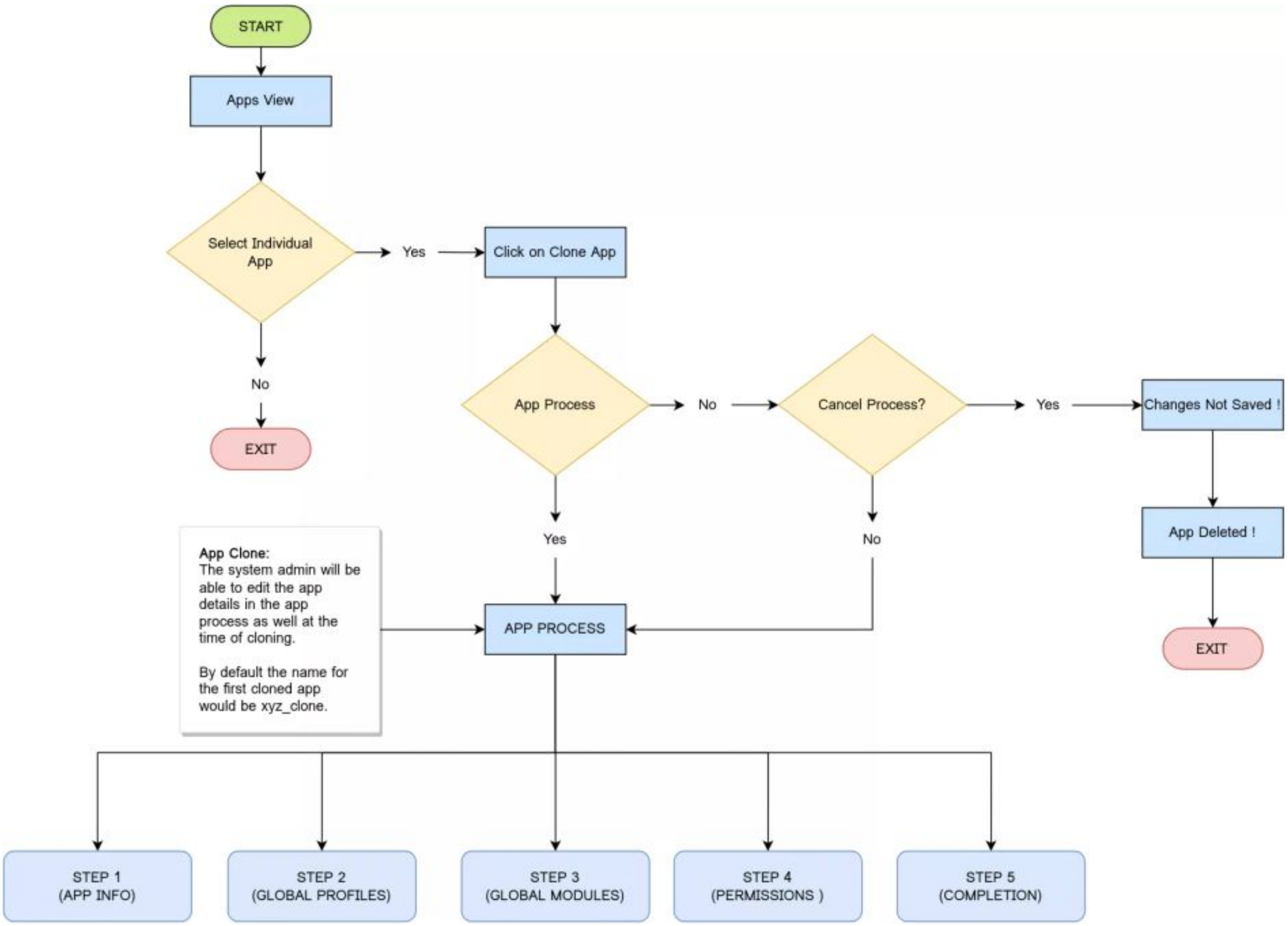


- **Edit App:**
  - This action enables administrator to modify the settings and configurations of a specific app. By selecting the Edit option, administrator can access and update various aspects of the app, such as:
    - **Step 1 (App Info)**
      - App Name
      - Developer Name
      - App Description
      - App Image
    - **Step 2 (Global Profiles)**
      - Modify, Update or Remove the Assigned Profiles
    - **Step 3 (Global Modules)**
      - Modify, Update or Remove the Assigned Modules.
    - **Step 4 (Permissions)**

- In this step, the system administrator initially encounters a list of selected profiles within the “Selected Profiles” column alongside with the list of selected modules in the “Module” column.
- Upon clicking on any specific profile, the system administrator is presented with a list of all modules associated with that profile.
- When a system administrator clicks on a module, it initiates an expansion revealing the View Types and Views linked to that module. Similarly, upon clicking on a View Type, the system administrator can further expand the list to display all the individual views that belong to that specific View Type.
- These Views are interactive when a system administrator clicks on a specific View, they are directed to the corresponding edit mode screen. This edit mode screen provides them with access to the relevant data associated with that particular View.

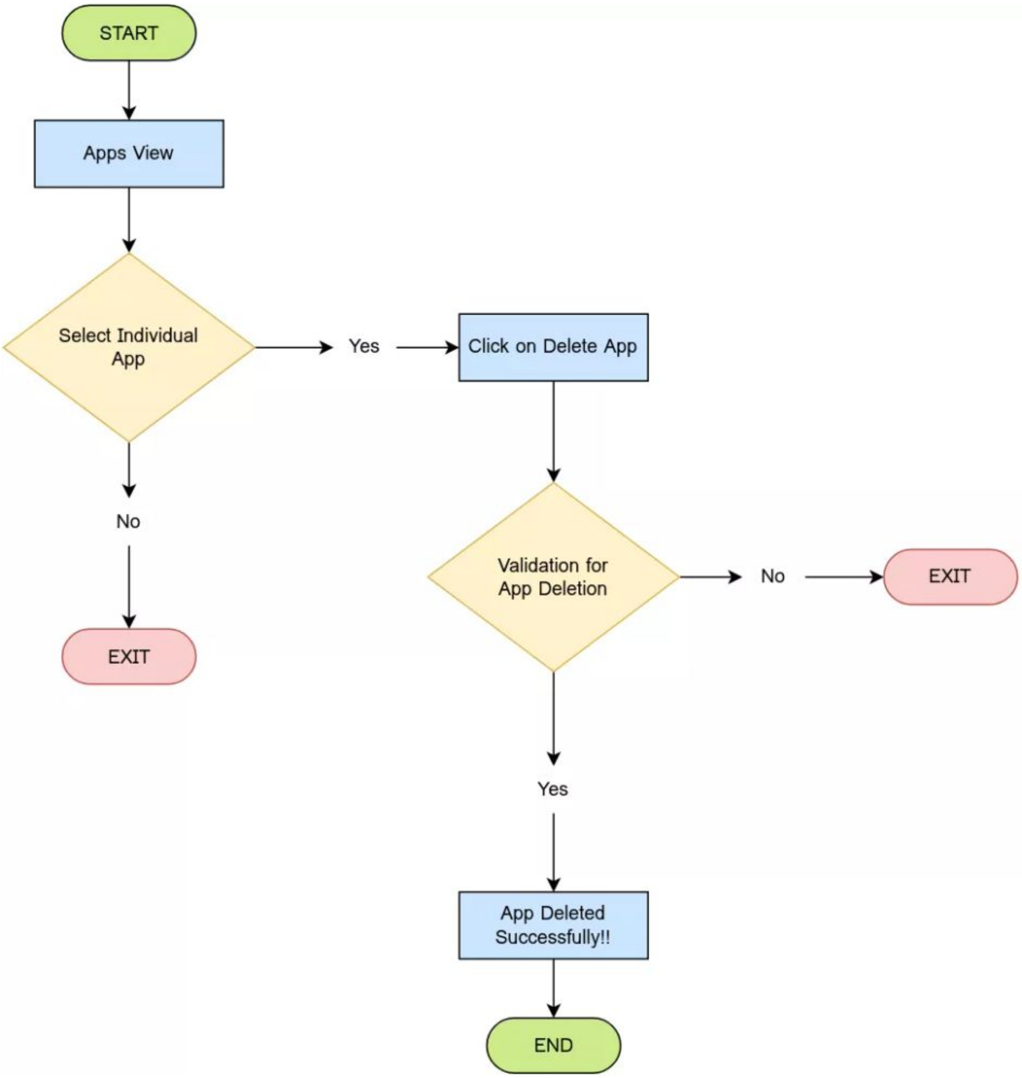
- **Clone App:**
  - administrator can create a duplicate/clone of an existing app by selecting the Clone option. This functionality is useful when there is a need to create a similar app with similar configurations and settings as an existing one. The cloned app can then be customized further based on specific requirements.
    - **Validations:**
      - **Unique App/Developer Name:**
        - When the administrator attempts to clone any app along with its features & functionalities, the system should check if the App and developer name entered is unique. This can be done by comparing the inputted name with the existing developer names in the system.
        - If the name is already in use, an error message should be displayed, prompting the administrator to enter a different and unique developer name.
          - ***Error:*** *Developer name should be unique. This one already exists*
        - *As the developer name is automatically generated by the system based on the app name from which the system administrator wants to create an app. So, The App name must be unique.*
      - **Clone App Name:**
        - While cloning an app, The system automatically generates the app name at the time of cloning i.e App_clone.
        - Either it is not the required field to change the app name but the administrator has the option to change the app name. This allows for easier identification of the cloned app and distinguishes it from the original app. The system should provide a field or prompt where the administrator can enter a new name for the cloned app.
      - **Initiate the Clone Second Time:**
        - If the System Administrator wants to clone the app for a second time within the CRM system, they would need to manually input a unique app name. This is because the system typically generates a unique app name, such as "App_Clone," only once during the initial cloning process.
        - When initiating the second app cloning, the system does not automatically generate a new unique app name. Instead, the System Administrator must manually provide a distinct and unique name for the new cloned app. This ensures that each cloned app within the CRM system has a unique identifier and can be easily distinguished from other apps.
      - **Clone a Previously Cloned App:**
        - If the System Administrator wishes to clone a previously cloned app within the CRM system, the cloning process remains the same as for the app cloning. However, there is a consideration when it comes to naming the newly cloned app.
        - The system automatically generated a name for the cloned app i.e App_Clone_Clone.
      - **Cancel/Quit Cloning Operation:**
        - If the System Administrator initiates the App Clone feature within the CRM system but decides to abandon or cancel the operation at any step, the system will display a prompt confirmation message to ensure that they intended to quit the cloning process. This prompt aims to prevent accidental termination of the cloning operation and provides an opportunity for the administrator to confirm their decision.
        - The confirmation message may include a question such as "Are you sure you want to quit the cloning process?" or a similar inquiry to confirm the administrator's intention. The message serves as a precautionary measure to avoid any unintended consequences or data loss resulting from an incomplete or abandoned cloning operation.

- User Flow Diagram:



App Clone - User Flow Diagram

- **Delete App:**
  - The Delete option allows administrator to remove an app from the system. When this action is selected, a validation process is typically initiated to confirm the deletion. This ensures that the app is intentionally deleted and prevents accidental removal of an app.
  - User Flow Diagram:



Delete App Module - User Flow Diagram

Lead Mapping

Refers to the process of mapping or aligning the fields and data from a lead source or external system to the corresponding fields in the CRM system. It ensures that the data collected from various lead sources is accurately and seamlessly transferred into the CRM, allowing for efficient lead management and follow-up.

During lead mapping, administrator or users configure the mapping rules or settings to define how the data fields from the lead source should be mapped to the corresponding fields in the CRM. This mapping is typically based on field names, data formats, and data types.

- Modules
    - Lead Fields w.r.t Module Fields

Web to Lead

- To create a lead through a web form, CRM utilizes a lead generation feature that allows you to design and deploy a web form on your website. This web form serves as a mechanism for website visitors to submit their information and express their interest in your products or services.
- The process typically involves the following steps:
    - **Creating a new lead form:**
        - In the CRM if a system administrator looks for an option or feature that allows them to create a new lead form or web form. Click on it to initiate the form creation process.

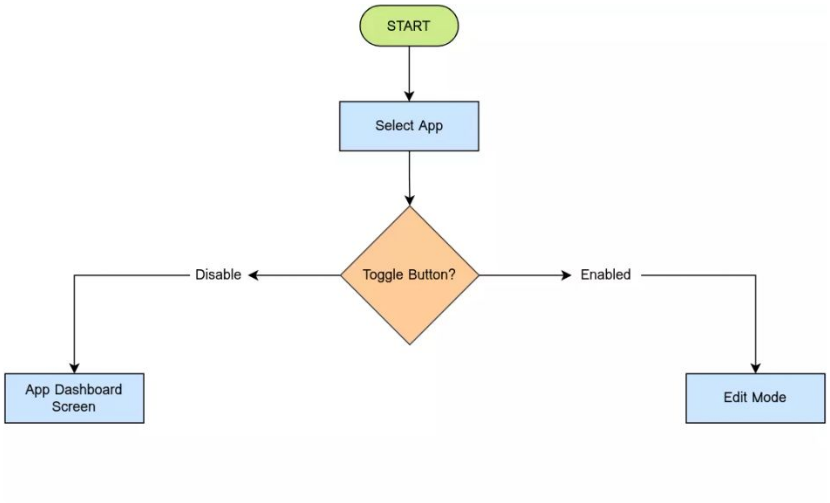
- **Selecting fields for the form:**
  - Choose the specific fields you want to include on the lead form. These fields capture the necessary information from the users who submit the form. Common fields may include name, email address, phone number, company name, job title, country, city and many other relevant data fields. When users initiate or create a web form, they will typically encounter a two-column layout that displays the available fields on one side and the selected fields on the other side. This layout allows users to easily customize the form by choosing which fields to include.
    - **Available Fields:**
      - The "Available Fields" column showcases a list of fields that can be added to the web form. These fields are typically provided by the CRM system and can include various types of fields such as name, email address, phone number, company name, job title, country, city and many other relevant data fields. Users can browse through this column to find the specific fields they want to include in the form.
    - **Selected Fields:**
      - On the other side, the "Selected Fields" column displays the fields that have been chosen by the user to be included in the web form. Users can drag and drop or use a selection mechanism to move fields from the "Available Fields" column to the "Selected Fields" column. As fields are selected, they will appear in the "Selected Fields" column in the order they were added.
  - **Specifying the return URL:**
    - Determine the specific URL where users will be redirected after submitting the lead form. This is typically a "thank you" page or any other destination on your website that acknowledges their submission and provides relevant information or instructions.
  - **Generate the form:**
    - After configuring the form settings, save your changes and click on the Generate button. After That, You are able to publish the form to make it live and accessible on your website.
  - **Embedding the form on your website:**
    - Obtain the embed code provided by the CRM system for the lead form. This code can be inserted into the HTML of your website's pages or shared as a hyperlink on appropriate landing pages or contact sections to capture the leads.

By creating a lead through a web form, you establish a streamlined process for capturing and managing potential leads directly within your CRM system. This enables effective lead tracking, engagement, and conversion, facilitating the growth of your business.

Edit Mode & Modules Tab

Edit Mode

- For entering into the edit mode, the system administrator needs to select the app first from the drop-down list in the side menu under the “Apps“.
- System Administrator will be able to enter the Edit mode by enabling the toggle button that is present on the top right corner.
- It serves as a centralized hub where system admin can access and manage the various details within the app.



Modules

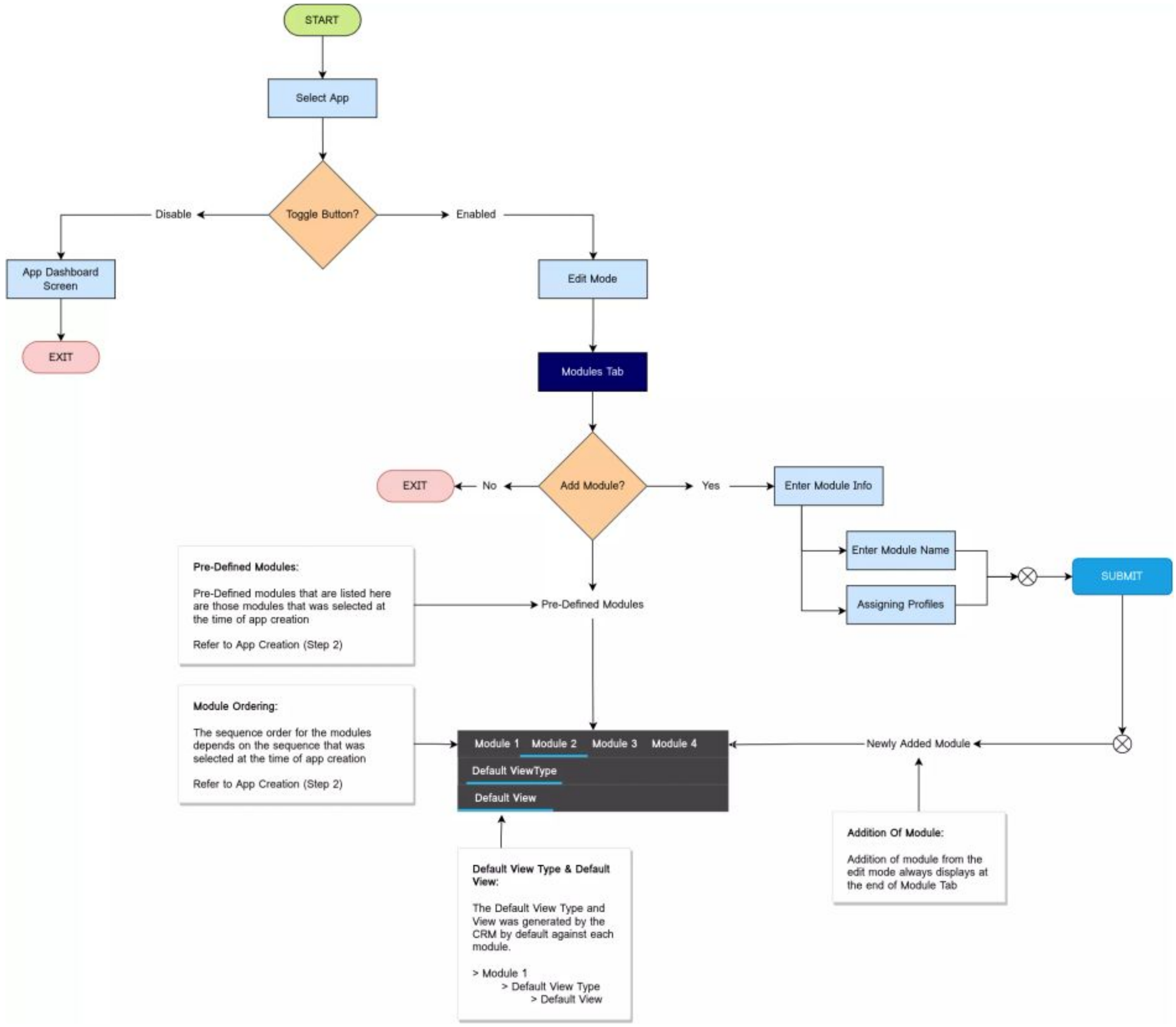
The System Administrator has the ability to view and manage all assigned modules associated with an app on the first tab associated with the app. This tab provides an overview of the modules that are currently assigned to the app and the ones that are assigned at the time of app creation.

The system administrator will be able to create the new module from this section as well associated with the profiles. Within this module tab the system administrator will be able to see and manage the following data,

- **Add Module**
    - To add a new module, system admin can utilize the "Add Module" functionality. The System Administrator can create a new module by following these steps:
    - Click on the "Add Module" button, typically located at the end of the modules tab interface a a success modal for creation of module will promptly appear.
    - The system administrator needs to enter the Module Name in the Input Field, which serves as the identifier for the new module.
    - Once the system administrator enters the module name, the next step involves assigning the appropriate profile to that specific module. To facilitate this, the system presents a drop-down list containing all the profiles that were selected during the initial creation process of the app. Also, the system administrator can assign multiple profiles to one module as well.
    - The profiles that is assigned to the module means that all the users that lies under the profiles will have the access to this module.
    - Upon clicking the "Save" button after configuring the module details, a success popup will promptly appear. This popup serves as a confirmation that the module has been successfully integrated into the CRM system under the designated app.
    - When a new module is created, it is automatically positioned at the end of the list in the "All Modules" tab.
- **Default View Type & Default View:**
    - When a System Administrator creates a new module, the CRM system automatically generates the default View Type and a default view specifically for that module.
    - The default view represents the initial arrangement or presentation of data for profiles accessing that module.
- **Modules Order Sequence**
    - The modules are organized in accordance with the order specified by the System Administrator during the app creation process. This sequence ensures that the modules are displayed systematically, aligning with the administrator's intended arrangement for easy access and efficient management within the CRM platform.
    - If the system administrator wants to change the sequence of newly added module, He needs to go out of the edit mode and then needs to go to Setting>App Setting, From where he can edit the app and go to the step 3 (Assigning Modules) and change the sequence of module as per his convienience.
    - The updated module sequence reflects the same in the edit mode as well as the modules tab outside the edit mode.

Furthermore, modules are often associated with different view types and views. These represent different ways of displaying and interacting with the data within the module. By default, any newly created module has its own default view type, default view that is auto-generated by the system.

User-Flow Diagram:



Pre-Defined Modules:

Pre-Defined modules that are listed here are those modules that was selected at the time of app creation

Refer to App Creation (Step 2)

Module Ordering:

The sequence order for the modules depends on the sequence that was selected at the time of app creation

Refer to App Creation (Step 2)

Default View Type & Default View:

The Default View Type and View was generated by the CRM by default against each module.

> Module 1
> Default View Type
> Default View

Addition Of Module:

Addition of module from the edit mode always displays at the end of Module Tab

Edit Mode | Modules - User Flow Diagram

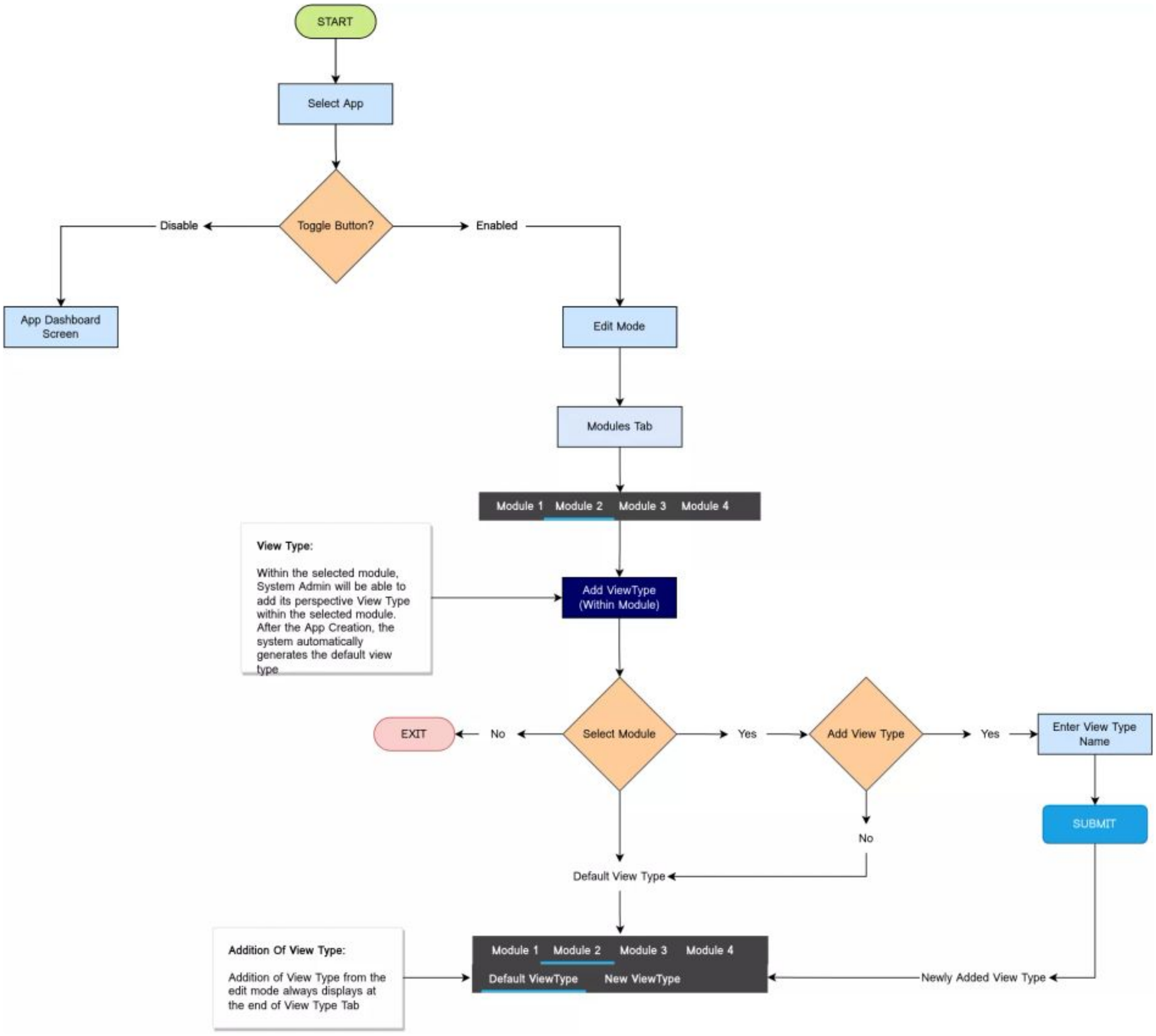
View Type

The second tab within the associated app is dedicated to managing view types related to specific modules. Here are the key points to understand about view types within the app:

- **Default View Type:**
  - When a System Administrator creates a new module, the CRM system automatically generates the default View Type specifically for that module.
  - The default view represents the initial arrangement or presentation of data for profiles accessing that module.
- **List of View Types**
  - The second tab in the Edit Mode displays a list of all the view types created for the associated app. Each view type is typically associated with a specific module, allowing system admin to organize and view data in different ways within that module.
- **Creation of Multiple View Types**
  - The System Administrator has the ability to create multiple view types associated within the selected module.
- **View Type Addition:**

- When creating a new view type, a modal window typically appears to prompt the System Administrator to specify which view type they want to add.
- In that modal, the system admin can simply write a name of View Type in the input field and proceed to the save button.
- When a new view type is created, it is automatically positioned at the end of the list in the "All View Type" tab.

User Flow Diagram



View Type:

Within the selected module, System Admin will be able to add its perspective View Type within the selected module. After the App Creation, the system automatically generates the default view type

Addition Of View Type:

Addition of View Type from the edit mode always displays at the end of View Type Tab

Edit Mode | View Type - User Flow Diagram

Views

The System Administrator has the ability to manage views associated with the selected view type and module.

- **Default View:**
  - When a System Administrator creates a new module, the CRM system automatically generates the default view within the default view type specifically for that module.
- **Creating New View:**
  - Additionally, the System Administrator can create multiple custom views associated with the selected view type and module.
  - When the System Administrator is creating a new view, following step needs to follow:
    - Add View
      - The system administrator will need to select the View Type in which he wants to create an view

- Enter View Name
    - Once the view type is selected, the System Administrator needs to click on “Add View”.
    - By doing so, they will be prompted to provide a name for the new view in a modal window.
    - This name will help identify the view and distinguish it from other views within the same view type.
- Select View Type
    - The next field after entering the view name is “cloning from“. In this field, a drop-down menu displays a list of all previously created views. This drop-down is primarily used for cloning purposes.
    - However, when the System Administrator is creating a new view from scratch, they can leave this field blank as it won't be applicable in this context.
    - After clicking on the save buttons leads to create the new view.
    - When a new view is created, it is automatically positioned at the end of the list in the "All Views" tab.
- Clone View
    - When the system administrator needs to clone an existing view within an specific view type then he needs to click on the “Add view” button
    - After selecting "Add View," the System Administrator needs to enter the name for the view that he is creating. After that, he needs to choose the existing view that he wants to clone from the drop-down menu.
    - The drop-down menu typically contains the list of available views that have been created for the selected module. It serves the purpose of facilitating cloning operations.
    - After submitting the save button, the cloned view has been successfully created.
    - The new clone view contains all the same sections, fields, access and permissions that was defined in the view that was cloned.

Section Management

The System administrator will be able to view, modify and delete the sections within the view for the selected view type and module.

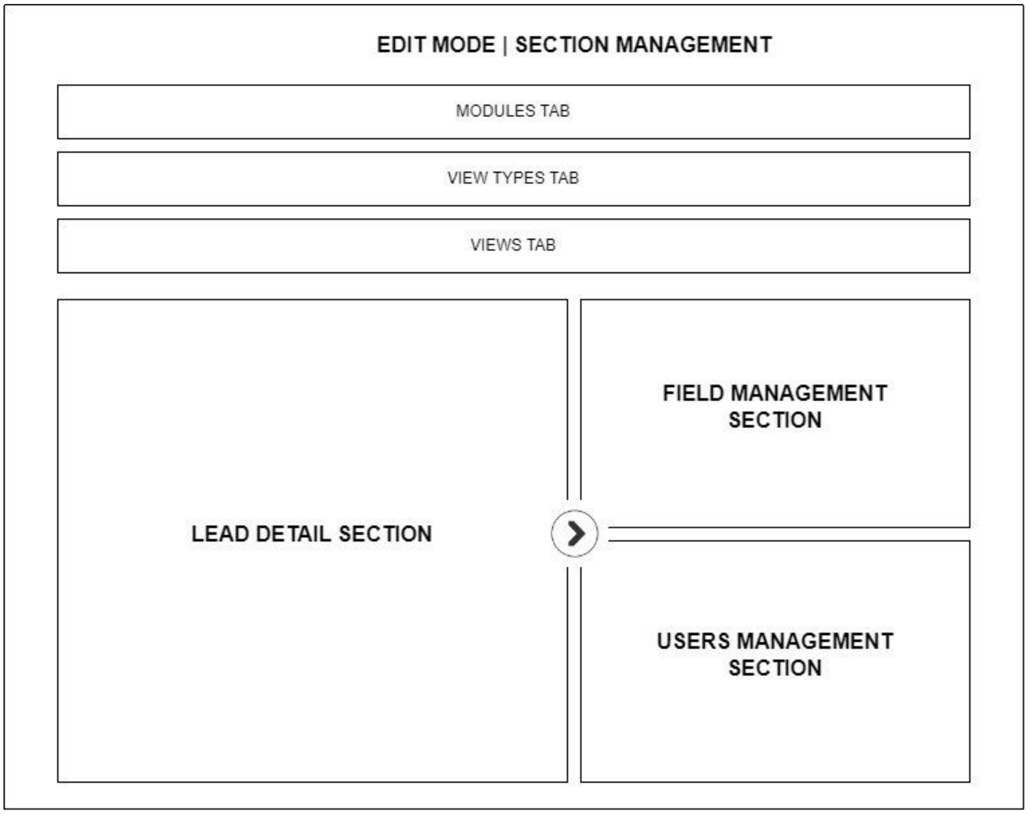
When the System Administrator adds a new section, the process will involve the following steps:

- Default Section
    - When a System Administrator creates a app, the CRM system automatically generates the default things with respect to all modules that are associated with the App ID.
        - Default View Types
            - Default View
                - Default Section
    - The system administrator would be unable to modify and delete the default section.
- New Section
    - The System Administrator clicks on the "New Section" button to initiate the creation of a new section.
- Enter Section Name
    - After clicking on the "New Section" button, input field will appear where the System Administrator can enter the name of the new section in the provided input field.
- Success Popup
    - Once the System Administrator successfully enters the section name and press the enter button, a success popup will be displayed, confirming that the new section has been added. The popup may display a message such as "Successful Section Addition."
- Modify Section Name
    - System administrator will be able to update the section name by doing the double click on the section name.
    - System administrator will be unable to edit the name for the default section.
- Delete Section
    - System administrator will be able to delete the section by clicking on the delete icon present next to each created section.
    - System administrator will be unable to delete the default section.

- Drag and Drop Fields into Section Layout
  - With the new section now created, the System Administrator can proceed to drag and drop fields into the newly added section. This allows the System Administrator to organize and arrange the fields as needed within the section.
- Placement of New Section
  - The newly added section will be placed under the default section and will appear underneath any previously existing sections. This hierarchical structure helps organize and present the data in a clear and user-friendly manner.
- Adding Multiple Sections
  - The System Administrator can add multiple sections within the selected view. This feature allows them to customize the view's layout and structure according to the requirements of the specific profile or the nature of the data being displayed.

There is a useful feature that allows for expandable and collapsible screens within views. This feature provides flexibility in managing the visibility and organization of sections, enhancing the user experience

- **Expandable/Collapsible Screens**
  - There should be an option to collapse or expand screens using an arrow icon. For instance, if the admin desires to focus solely on the view types and lead details, they can simply click on the arrow icon. As a result, the right section of Field/User Management will collapse, and the admin will have an unobstructed view of the expanded view section.



Field Management

The System Administrator has the ability to manage and add fields from the section. This feature empowers the System Administrator to customize and organize the data fields within the section to best suit the needs of the specific profile, view, view type, and modules. By default, The field management consist of the three main components that includes,

- **Field Info**
  - In this particular section, The system administrator will be able to add the field info like field name, placeholder, label, control type etc
    - **New Field**
      - When the System Administrator wants to add a new field then he needs to click on the "New Field" button.
      - Upon clicking on the "New Field", the “Field Info” section will be automatically opened by default. Rest of the fields are:
        - Field Label

        - Field Name
        - Placeholder Text
        - Field Control Types (Dropdown)
        - Checkboxes
      - Upon opening the Field Info section, the cursor will be automatically placed in the field label input field by default. This will enhance the user experience and streamline the creation process.
    - **Success Popup**
      - After the System Administrator enters all the details into the field info section, a success popup appears, confirming the successful addition of the field. The success popup typically contains a brief message or notification that highlights the successful action taken by the System Administrator.
    - **Newly Added Fields**
      - When the System Administrator adds new fields to a section, by default, these newly added fields are placed in the "Not Visible to Layout" section. This default placement helps to prevent the fields from immediately appearing on the user interface until the system admin decides to show these fields to the users/profiles.
      - The "Not Visible to Layout" section acts as a staging area for newly added fields, keeping them hidden from the user interface until the System Administrator decides to make them visible by placing them in the appropriate sections or layouts.
    - **Module-Fields Linking (One-To-Many Relationship)**
      - If the administrator wants to use the fields of the other modules within any existing module then he must select the relationship and select the module at the time of field creation.
      - By doing that he will be able to build the relationship and see the fields later in the Global Fields section (i.e if the system administrator stands in Lead Module and wants to use the fields of Contact Module)

- **Field Visibility**
  - In this section, The system administrator will be able to manage the permissions using the Checkboxes against the all profiles, users and groups that are associated with the app w.r.t the view of which the administrator wants to manage the permissions. The interface allows for collapsible/expandable sections to efficiently organize the information.
- **All Profiles (Collapsible/Expandable Screen):**
  - Under the "All Profiles" section, the system administrator can view and manage permissions for each profile (i.e Profile 1, Profile 2, Profile 3) against the corresponding view names. The "Read" and "Edit" access options are displayed against each profile name and the system can manage the permissions for each profile using the checkboxes.

PROFILES	READ ACCESS	EDIT ACCESS
Profile 1	□	☑
Profile 2	□	☑
Profile 3	☑	□

- **All Groups (Collapsible/Expandable Screen):**
  - Similarly, Under the "All Groups" the system administrator can view and manage permissions for each group (i.e Group 1, Group 2, Group 3) against the corresponding view names. The "Read" and "Edit" access options are displayed against each group name and the system admin can manage the permissions using checkboxes.

GROUPS	READ ACCESS	EDIT ACCESS
Group 1	☑ -	☑ -
Group 2	□ -	☑ -
Group 3	☑ -	□ -

- **All Users (Collapsible/Expandable Screen):**
    - Under the "All Users" the system administrator can view and manage permissions for each User (i.e User 1, User 2, User 3) against the corresponding view names. The "Read" and "Edit" access options are displayed against each user name and the system admin can manage the permissions for each user using checkboxes.Under the "All Users" the system administrator can view and manage permissions for each User (i.e User 1, User 2, User 3) against the corresponding view names. The "Read" and "Edit" access options are displayed against each user name and the system admin can manage the permissions for each user using checkboxes.

USERS	READ ACCESS	EDIT ACCESS
User 1	☑ -	☑ -
User 2	☐ -	☑ -
User 3	☑ -	☐ -

- **Field Management (Existing Fields) :** There are two subsections that are associated with this particular section,
    - **Not Visible on Layout:**
        - When a system administrator adds a new field it will automatically be shown in this section.
        - System Administrator would be able to drag and drop the fields into the “Lead Details” section.
        - There would be a Search bar in this section with an input field by which the system administrator can search the leads that are added over time
    - **Global Fields (Related Fields):**
        - In this section, The system administrator would be able to see all the fields that are associated with each module and the fields that are interlinked globally between two modules. i.e. If the System Administrator builds the relationship between the Opportunity Module & Company Module then Company Module fields are also shown in the global fields within the Opportunity Module.
        - There would also be a Search bar in this section with an input field by which the system administrator can search the global fields.

User Management

In the User Management module, the system admin will have the ability to manage user profiles, groups, and individual users using checkboxes for easy selection and management. The following options are available.

The System administrator can view the below-mentioned details in the access management

- Profiles
    - All the Profiles will be listed here with the check box which those checkboxes will be true whose added while creating the profile.
    - The System administrator will be able to select more profiles to give them access to that particular Module, View Type and View which was selected.
    - The system administrator will be able to see all the users by clicking on a specific profile.
        - The system will show the list of all users along with the checkboxes
        - If the System Administrator wants to remove any specific user from that particular app then he must uncheck the checkbox.
            - **Validation:** When an administrator attempts to remove a specific user from that particular app, a validation prompt is displayed to ensure confirmation of the action. The purpose of this validation prompt is to prevent the accidental deletion of users and to provide an extra layer of caution before proceeding with the removal.
- Groups
    - All the groups will be listed here
    - The System administrator will be able to see the list of all group members by clicking on the group name.
    - The system administrator chooses or deselects options by clicking on the checkbox.
- Users
    - All the user’s list will be listed here except
        - Those who are already in the profile.

    - The System administrator will be able to select the users by clicking on the checkbox.
        - System Administrator will also be able to remove the users by deselecting the checkbox. This will remove the user from that particular app.

Advance User Application

The system administrator can access this screen by clicking on the "Advanced User Application" button located at the top-right corner of the interface while they are in the Edit Mode of the system.

- When the system administrator clicks the "Advanced User Application" button, it triggers a modal window to appear.
- This modal window displays read-only data, meaning the administrator can view but not modify the information presented.
- The purpose of this screen to help the system administrator to easily identify the access and permission with respect to the Module level, User level & Field level.

This screen basically divided into three tabs or categories, which are defined below:

1. Page Level Audit/Module Level Audit

In the "Page Level Audit" tab, the system administrator gains access to a screen with interlinked columns that provide detailed insights at the module level. Here's a breakdown of these columns and how they are interconnected:

- **Modules Column**
    - To quickly find a specific module in the list, a search field (input field) is provided. The system administrator can enter keywords related to the module they're looking for, and the list will filter to show matching results.
    - This column displays the names of all the modules associated with the CRM app with respect to App ID.
    - The system administrator can select a particular module from this list to view more detailed information about that module.
    - When a module is selected, it expands to reveal a list of all the view types associated with that module.
    - Upon selecting a specific view type, it further expands to display a list of all the individual views associated with that view type. Views represent different ways of presenting and organizing data within the CRM.
    - The system administrator, needs to select the specific view from the list to proceed.
- **User/Profile/Group Column**
    - To quickly find a specific user, profile or a group in the list, a search field (input field) is provided. The system administrator can enter keywords related to the user, profile or a group they're looking for, and the list will filter to show matching results.
    - When system administrator first access this column, it will be empty by default, awaiting a selection.
    - To populate this column, the system administrator needs to click on a specific view in the "Modules" column. By doing so, the system will fetch and display information related to users, profiles, and groups associated with the selected view.
    - Once a view is selected, this column will show a list of all users, profiles, and groups that are linked to that particular view against the View ID.
- **Fields Column**
    - To quickly find a specific field, a search field (input field) is provided. The system administrator can enter keywords related to the field they're looking for, and the list will filter to show matching results.
    - After choosing a user, profile, or group in the "User/Profile/Group" Column, the system populates the "Fields" column with a list of fields associated with the selected entity.
    - These fields are accompanied by indicators for Read Access and Edit Access, each featuring check-boxes.
    - For all users, profiles, and groups that possess either read or write access to the displayed fields, the check-boxes in the "Fields" column will be enabled. This applies to users, profiles, and groups with read-only access, write-only access, or both.
    - **Limitation**
        - It's important to note that the system administrator cannot assign or modify access permissions from this screen. This screen is read-only and provides insight into the existing access privileges related to specific fields.

2. User Level Audit

In the "User Level Audit" tab, the system administrator gains access to a screen with interlinked columns that provide detailed insights at the user level. Here's a breakdown of these columns and how they are interconnected:

- **User/Profile/Group Column**
  - To quickly find a specific user, profile or a group in the list, a search field (input field) is provided. The system administrator can enter keywords related to the user, profile or a group they're looking for, and the list will filter to show matching results.
  - This column displays all the list of all users/groups & profiles with respect to the App ID.
  - When the system administrator clicks on any of user, profile or group it would be able to see the modules that is assigned.
- **Modules Column**
  - To quickly find a specific module in the list, a search field (input field) is provided. The system administrator can enter keywords related to the module they're looking for, and the list will filter to show matching results.
  - When system administrator first access this column, it will be empty by default, awaiting a selection.
  - When you select a user, profile, or group from the "User/Profile/Group" Column, this column populates with information related to the modules associated with that specific selection.
  - The column displays a list of modules that have been assigned or are accessible to the selected user, profile, or group.
  - By clicking on any of the listed modules, you can access details about the module, its associated view types, and individual views. This allows for a deeper understanding of which parts of the CRM system are accessible to the selected user, profile, or group.
  - When a module is selected, it expands to reveal a list of all the view types associated with that module.
  - Upon selecting a specific view type, it further expands to display a list of all the individual views associated with that view type.
- **Fields Column**
  - To quickly find a specific field, a search field (input field) is provided. The system administrator can enter keywords related to the field they're looking for, and the list will filter to show matching results.
  - Based on the selected view, the system administrator will be able to see the all fields with the read and write access.

3. Field Level Audit

In the "Field Level Audit" tab, the system administrator gains access to a screen with interlinked columns that provide detailed insights at the field level. Here's a breakdown of these columns and how they are interconnected:

- **Fields Column**
  - To quickly find a specific field, a search field (input field) is provided. The system administrator can enter keywords related to the field they're looking for, and the list will filter to show matching results.
  - This columns displays all the fields with respect to the App ID.
  - The system administrator needs to select the field from the list that is displayed to proceed.
- **Module Column**
  - To quickly find a specific module in the list, a search field (input field) is provided. The system administrator can enter keywords related to the module they're looking for, and the list will filter to show matching results.
  - Based on the selected field, it expands to reveal a list of all the modules associated with that field.
  - Based on the select module, it expands to reveal a list of all the view type associated with that module.
  - Upon selecting a specific view type, it further expands to display a list of all the individual views associated with that view type.
  - The system administrator needs to click on the specific view from the list to proceed.
- **User/Profile/Group Column**
  - To quickly find a specific user, profile or a group in the list, a search field (input field) is provided. The system administrator can enter keywords related to the user, profile or a group they're looking for, and the list will filter to show matching results.
  - This column displays all the list of all users/groups & profiles based on the selected module with respect to the App ID.
  - Each users/group & profile display along with the check-boxes against each of them so the system administrator can easily identify which user has the read or write access based on the field hierarchy,
    - Enabled check-boxes mean User/Profile/Group has either read access/write access of if both check-boxes enabled means it has both read and write access.

    - Disabled check-boxes mean User/Profile/Group has no read access/write access of if both check-boxes disabled means it doesn’t have read and write access.

Modules Tab

- **App Selection**
  - Clicking on "Apps" from the side menu triggers a drop-down list to appear.
  - This list contains all the available apps associated with the profile and for all the users that are associated with that profile.
  - From this list, the system administrator chooses the specific app they wish to access by simply clicking on its name.
- **Individual App Lead Listing**
  - After selecting the app from the list, the system administrator can access a comprehensive view of all assigned modules in the modules tab along with their respective lead listing data, when the Edit Mode toggle button is not enabled.
- **Modules Tab**
  - The modules that are displayed here are those pre-defined modules that are assigned to all apps that are mentioned below,
    - Lead Module
    - Company Module
    - Contact Module
    - Opportunity Module
  - If the system administrator wants to add another module other than these pre-defined modules then he needs to add the module from the Edit Mode and then the module will display at the end of the modules tab.
- The modules are organized in accordance with the order specified by the System Administrator during the app creation or edit app process. This sequence ensures that the modules are displayed systematically, aligning with the administrator's intended arrangement for easy access and efficient management within the CRM platform.
- Upon selecting a specific module from the modules tab, the System Administrator gains access to the lead listing data with respect to module. Within this view, he can access and manage the following details,
  - **Search Bar**
    - There is search bar present at the top left corner. By using that the system administrator can see the quick and targeted searches based on specific lead details or criteria.
  - **All Lists Tab**
    - This tab contains the drop-down that contains all the listings that system administrator add from list view controls. Meanwhile, the system administrator have the option to select the list based on the selection of category that he wants to see.
    - The system administrator can see the following icons next to each list by which he can manage the following,
      - Edit: By this, the system administrator can edit the name of the list
      - Delete: By this, the system administrator can delete the list.
  - **List View Control**
    - When the system administrator clicks on the List View Control that leads to the drop-down from where he can manage the following things,
      - New
        - By clicking on the new, a modal will appears with the input field that requires system administrator to enter the list name.
        - After saving the list name, this list will be added to the drop-down of the listing tab.
      - Add/Remove Column
        - For the addition and removal of column, the system administrator needs to select the list from the “All lists“ drop-down.
        - Then he needs to clicks on “Add/Remove Column” under the “List View Control“.
        - A modal will prompt that display the two columns “Available FIelds“ & “Selected Field“.

    - Available fields contains all the fields that have the read access with respect to the profile from which the system admin logged in.
    - Selected Module column is empty by default.
    - The system administrator have the option to Drag & Drop the fields from “Available Fields“ column to the “Selected Field“ column as well as he can move the fields into both columns by using the arrow button present next to each field.
- **Kanban Settings:**

- **Add Lead**
  - For the addition of lead the system administrator needs to select the module first.
  - After selecting the module, the system administrator needs to click on the “Add Lead“ button, it will triggers to open a modal.
  - On the modal, the system administrator can select the View Type from the drop-down list in the first field appears with respect to the App ID
  - Based on the selected view type the system will fetched the list of all views available within the selected view type. The system administrator can select the view from the list and clicks the submit button to proceed.
  - By clicking the submit button, another modal opens to add the lead data.
  - The fields that are added to the sections in the edit mode will reflects the same in this modal with the section along with the input fields.
- **Filters**
  - Customizable filters that allow the System Administrator to refine the displayed lead listing based on different parameters, enhancing data visibility and analysis.
- **Action:** Various action options that the System Administrator can take for each lead, including:
  - **Call:** Allows them to initiate a call directly from the CRM, streamlining communication with leads.
  - **View Lead Details:** Provides a comprehensive view of all lead information, facilitating a comprehensive understanding of their status and interactions.
  - **Edit Lead Details:** Enables the System Administrator to update and modify lead details as required, ensuring accurate and up-to-date information.
  - **Delete:** Offers the option for System Administrator to remove a lead from the CRM, aiding in lead management and data organization.