Dash Board :

- On Board no of CA (City & State wise) -(Date wise)
- On Board of Company (City & State wise) -(Date wise)
- Package wise Sales figures (Date wise)
- Package Upgration Report (Date wise)
- No of User of Trials (Package wise & Date wise)
- Employee Management (Present & Absent today)
- Customer Tickets generate (Date wise)
- CA wise No of Customers (Top 10) - (Date wise)

CA Management : (Ami ekhane CA er sab kichu dekhte chai)

Date – State – CA ID – CA Name – CA Firm Name - Mobile – Mail ID – Action (View details as per their profile ,Delete, Rating, Send SMS/Mail provision)

- In this section , we can assign the customer to a CA as per their rating / nearest location / Customer's choice.
- In this section , we can assign a CA to a Customer as per their choice.

- Ekhetre Customer & CA portal er Data match karte have.

CA wise Customer List (Search Option)

State – District – CA ID (Click & Show the Details) - CA Name – Mobile – Mail ID -No of Trial customer- Active Customer - Action (View details of total No of customers & their Name & contact Details , Package wise No of Active customers) -

- **Ekhetre Customer & CA portal er Data match karte have.**

Business & Earnings : (Search Option)

CA ID – State- CA Name – No of Package -1 Trial - No of Package-2 Trial- No of Package-3 Trial - No of Package -1 Sale - No of Package-2 Sale- No of Package-3 Sale - Total Sales amount -Total Earnings – Action (View the date wise & package wise details sales) .

Need a logic section of package wise commission (% wise) fix up for each CA. (By default akta CA commission (% wise) thakbe, admin mone karle karor khetre change karte pare) We will decide from admin section & update the commission

- **Ekhetre CA commission e Invoice generate karte have tai tar provision thakbe with GST**

Package Management :

Add Package : Package name – Package details – Amount – Package details ta amra back end design kare niye okhane upload kare debo.

- Package Details at a glance in a chart a dibi..
- Amra mone karle package a discount jeno dite pari, tar provision thake.

Trial Pack & Active Pack No :

Date – State- Trial Pack name –Trial Days- Used by – Mobile no – Mail ID – Action (View detail the customer /Company, Contact details, Send mail /SMS/Notification for payments for upgradation)

Date – State- Upgradation Pack from – Upgradation Pack to – Upgradation Payments amount - Payment status -Action

In this section , will be automatic process for Messaging / Mailing /Notification for Package upgradation and Payment for active status.

Trial days 15 days thakbe….10 days por thekei customer er kache mail, notification pop up for payment dekhabe ecash book open karlei.Amra action button a provision rakhbo jate okahn theke customize / bulk a customer ke message pathate pari.Akta sheet o ready have, jeta dekhe telecaller trial customer ke call karte pare for activation.

Customer Queries & Tickets :

We want to see the queries /Suggestion & our back end team will reply the same . Tickets no will be generated for the queries & will be sent a message immediately against the queries' ticket confirmation.

CA Queries & Tickets :

We want to see the queries /Suggestion & our back end team will reply the same . Tickets no will be generated for the queries & will be sent a message immediately against the queries' ticket confirmation.

<u>Reminders :</u>

This section will be designed for customize & bulk messaging / Mailing / Push notification for customer & CAs

<u>Agent Management :</u>

It will be like same CA portal. The agent recruits the Customer & CA directly. Just they will get the commission against their works.

Amra jeno date wise eta jante pari je agent kota Customer & CA add kareche amader portal a .

<u>Employee Management :</u>

It will be same like CA portal.

<u>Payments :</u>

- ➢ Need a payment received details (Credit) through a various Payment mode – Date wise & Package wise- CA wise – State wise
- ➢ Need a payment details (Dedit) through a various Payment mode – Date wise – Purposes – Paid by – Authorized by the payment (Only from Admin section)

<u>Sales and Revenue Analytics:</u>

- Sales Reports and Analytics
- Revenue Forecasting
- Customer Lifetime Value Analysis

<u>System Updates & Maintenance</u>

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1. User Management:

- User Roles and Permissions
- User Creation, Editing, and Deactivation
- Role-based Access Control (RBAC)
- Two-Factor Authentication

2. Company Settings:

- Company Information Management
- Fiscal Year Settings
- Multi-Company Support

3. Financial Settings:

- Chart of Accounts Management
- Tax Settings Configuration
- Currency and Exchange Rate Management

4. Marketing Campaign Management:

- Create and Manage Marketing Campaigns
- Track Campaign Performance
- Integration with Marketing Analytics Tools

5. Sales and Revenue Analytics:

- Sales Reports and Analytics
- Revenue Forecasting
- Customer Lifetime Value Analysis

6. Product and Service Management:

- Add, Edit, and Delete Products/Services
- Inventory Management
- Pricing and Discount Configuration

7. Expense Management:

- Track and Categorize Expenses
- Expense Approval Workflow
- Expense Reports and Analytics

8. Integration and API Management:

- API Key Management
- Integration with Payment Gateways
- Third-Party Software Integration Settings

9. Security and Compliance:

- Audit Trails and Activity Logs
- Compliance Reporting
- Data Encryption and Security Policies

10. Communication Management:

- Internal Messaging System
- Notifications and Alerts Configuration
- Integration with Email and Communication Tools

11. Customer Relationship Management (CRM):

- Customer Profiles and Segmentation
- Interaction History Tracking
- Lead and Opportunity Management

12. Dashboard and Reporting:

- Customizable Dashboards
- Real-time Analytics
- Financial and Operational Reports

13. Subscription and Licensing:

- License Management
- Subscription Plans and Billing
- Renewal and Upgrade Management

14. Help and Support:

- In-App Documentation and Guides
- Support Ticket System
- Knowledge Base and FAQs

15. System Updates:

- Software Update Notifications
- Change Log and Release Notes
- Version Control and Rollback Options

16. Settings and Preferences:

- General Application Settings
- User Preferences (e.g., language, time zone)
- Theme and UI Customization

17. Backup and Recovery:

- Regular Data Backups
- Data Restoration Options
- Disaster Recovery Plan

18. Employee Management:

- HR Information System (HRIS)
- Employee Profiles and Permissions
- Time and Attendance Tracking

19. Training and Onboarding:

- Training Materials and Resources
- Onboarding Checklist
- User Education and Training Modules

20. System Health and Performance:

- System Monitoring and Health Checks
- Performance Metrics and Analytics
- Error Logging and Troubleshooting Tools

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4. Product Management:

- Add, Edit, and Delete Products
- Product Categories and Attributes
- Inventory Management
- Product Pricing and Costing

5. Pricing Strategy:

- Dynamic Pricing Rules
- Discount and Promotional Pricing
- Bulk Pricing Configuration
- Price Versioning and History

6. Marketing Campaign Management:

- Create and Manage Marketing Campaigns
- Track Campaign Performance
- Integration with Marketing Analytics Tools

7. Sales and Revenue Analytics:

- Sales Reports and Analytics
- Revenue Forecasting
- Customer Lifetime Value Analysis

8. Marketing Policy Management:

- Define Marketing Policies and Guidelines
- Approval Workflow for Marketing Strategies
- Compliance Tracking with Marketing Policies

9. Expense Management:

- Track and Categorize Expenses
- Expense Approval Workflow
- Expense Reports and Analytics

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