**CRM of Creazione Services:**

User Type: Customer ( Investor ), Business Associate, Representative Executive, Admin, Employee.

Admin

RM

RM

RM

RM

Employee

RE

RE

RE

Customer

Customer

Customer

Customer

Customer

Customer

Each Investor(Customer) get return within first week of the next month, profit as mention in the agreement.

RE also a Employee of the company.

Web application version (1.0):

1.admin can add, update, delete, read data of employee, customer, RE,and BA.

2.BA can see how many own tree of investor and RE.

3.RE can add the customer to the portal and can print agreement of own customer and can upload it. and see own payment history.

4. Customer can log in and see own payment history and can invest any time using the portal and get payment slip, customer can modify own data (basic information only).

5.

Entity and their relationship:

[\*=mandatory fields # = optional fields FK=Reference of other entity ]

Customer:

Customer\_id,full\_name(\*),phone\_no(\*),email\_id(#),account\_no(\*),nominee\_id,(FK),document\_Id(FK), agreement\_id(FK).pass(\*),image.

Business Associate: offer letter but not employee (commission based)

Representative Executive:

Bank Account:account\_no,bank\_name,ifsc\_code

Documents:document\_id,adhar\_no,pan\_no,adhar\_verified,pan\_verified

Nominee:nominee\_id,full\_name(\*),date\_of\_birth(\*)

Agreement:id,printed\_date,upload\_date,file\_url.

Payment: transaction id,from,to,amount,payment\_mode,type,status

Admin:name,email,phone,pass,image,created\_at

RM employee(employee ).

Under (BA,RE)

Employee: name, designation(FK), phone\_no,email,account\_no(FK),salary\_id(FK),image,address.referel\_key

Employee Documents: pan\_no, adhar\_no, appointment\_letter,date\_of\_joining.

Qualification: employee id, degree name, year of passing, collage/university name.

Salary: id, basic ,hra,ca,ma,sa,ga,

( deduction) epf,esi,tax,

Work Report: employee\_id, date, description,file,report\_to,status,start\_time,exit\_time(report\_submitted time).

Designation:id,name

No of screen and functions:

1st user type page where shown 4 basic link for admin login,BA login,customer Login, Employee Login.

2nd each login page input fields for login and link for forget password.

3rd forget password page logout page as well.

Dashboard page:

Admin:

Manage BA,customer(add,delete,update,read).

Manage Employee including RE(add,delete,update,read).

Manage Designation and salary structure.

Manage payouts table.

Generate reports.

Customer:

Dashboard payment history, update basic information, invest page, withdrawn investment request. Offers page

Employess page:dashboard,write reports,download payslips,update profile picture,update basic information.