

## FULL COMPANY CRM WORKFLOW & MODULE DOCUMENTATION

1. USER ROLES - Admin (Full Control) - HR - Sales Team (Multiple Members) - SEO Team (Multiple Members) - Developer Team (Multiple Members)

Each role sees only its own assigned work.

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2. ADMIN MODULE - Add Employees (Name, Email, Password, Mobile, Role) - Assign Clients/Projects: \* Sales: Leads/clients assigned \* SEO: Clients + post/reel workload \* Developers: Projects + tasks assigned - Monitor All Reports: \* Sales reports \* SEO daily uploads \* Developer progress - Attendance Management (All department view) - Break Punch Report - Logout Punch Report

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3. SALES MODULE Visible only to assigned Sales Members.

FEATURES: - Assigned clients list - Call attempt logs - Conversation notes - Follow-up system - Quotation upload module - Deal status: \* Interested \* Not Interested \* Follow-up \* Quotation Sent \* Closed Won / Closed Lost - Daily sales dashboard

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4. SEO MODULE Visible only to assigned SEO Members.

FEATURES: - Assigned clients dashboard - Daily Content Upload: \* Posts \* Reels \* Captions \* Hashtags - Monthly SEO Reporting - Task status tracking

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5. DEVELOPER MODULE Visible only to assigned Developers.

FEATURES: - Assigned Projects Page - Requirements Page - Daily Work Report: \* Work Completed \* Pending Tasks \* Issues \* Attachments - Progress Tracking

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6. ASSIGNMENT SYSTEM (CORE LOGIC) Admin assigns: - Clients → Sales / SEO - Projects → Developers

Employees ONLY see: `Assignment.employee == logged_in_user`

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7. HR MODULE - Employee details - Attendance panel - Leave management - Salary logs - Document uploads: \* Resume \* Offer letter \* Appointment letter

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8. ATTENDANCE SYSTEM (FULL WORKFLOW)

A. LOGIN PUNCH - Employee opens dashboard → Punch Login - Time saved into Attendance table

B. BREAK SYSTEM - Break Punch Out - Break Resume Punch In - Multiple breaks allowed - Total break time auto-calculated

C. LOGOUT PUNCH - Employee presses Logout Punch - Final logout time stored - Over-time or under-time calculation

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9. DAILY TIMELINE FOR ANY EMPLOYEE - Punch Login - Work (Sales / SEO / Developer tasks) - Break Out → Break In (multiple times) - Punch Logout - Daily report automatically generated

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10. OWNER DASHBOARD - Total Sales - Total Profit - Total Expenses - Team Performance - Attendance Overview - Client Satisfaction - Project Completion Status

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THIS PDF CONTAINS THE COMPLETE WORKFLOW & MODULE PLAN FOR THE ENTIRE SOFTWARE.