

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.

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

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

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

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

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

Employees ONLY see: Assignment.employee == logged_in_user

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

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

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

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

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