**CRM Employee Details Dashboard Documentation**

**Purpose**: This document serves as a detailed guide to the CRM Employee Details Dashboard. It explains how to enter, view, and manage employee and daily task information, ensuring team members can handle their own data and tasks independently.

**1. Overview**

The Employee Details Dashboard is designed for team members to manage personal, contact, and job details, as well as daily tasks. It provides a structured way for everyone to keep their information updated, upload/download documents, and track task progress.

**Task 1**: **Create the dashboard with features that include**:

1. **Employee Details Form**: A comprehensive form for logging employee information, including personal details, contact details, job details, educational qualifications, family details, financial details, previous experience, and skills.
2. **Daily Task Form**: A form for logging daily tasks, including title, description, start/end time, status, and priority level.
3. **Daily Task Detailed List**: A table to display logged daily tasks with options to view details and edit tasks.
4. **Edit and Update Options**: Ability for users to update their task details and employee information directly from the dashboard.

**Task 2 : Employee Information Form**

**Purpose**: This form collects detailed information about each employee, organized into specific sections for easy access and management. Each section allows employees to fill in, update, and upload necessary details, which will then display in the **Employee Details** section for reference.

**Sections and Fields**

1. **Basic Information**
   * **Name**
   * **Employee ID**
   * **Date of Joining**
   * **Position**
   * **Department**
2. **Personal Details**
   * **Date of Birth**
   * **Gender**
   * **Marital Status**
   * **Nationality**
   * **Address**
   * **Emergency Contact** (Name, Relationship, Phone Number)
3. **Contact Details**
   * **Personal Phone Number**
   * **Work Phone Number**
   * **Personal Email**
   * **Work Email**
   * **LinkedIn Profile**
4. **Job Details**
   * **Employment Type** (Full-time, Part-time, Contract)
   * **Reporting Manager**
   * **Job Location**
   * **Work Schedule** (Shifts, Flexible, etc.)
5. **File Uploads**
   * **Job-Related Documents** (Offer Letter, Contract, Certifications, etc.)
   * **ID Proofs** (e.g., Passport, Driving License)
6. **Educational Qualifications**
   * **Highest Degree/Qualification**
   * **Institution Name**
   * **Field of Study**
   * **Year of Graduation**
   * **Certifications** (Upload Certificates)
7. **Family Details**
   * **Spouse’s Name**
   * **Children’s Details** (if applicable, Names and Ages)
   * **Dependents** (e.g., Parents, Other Dependents)
8. **Financial Details**
   * **Bank Account Number**
   * **Bank Name**
   * **IFSC Code**
   * **PAN Number**
   * **Salary Account Details**
9. **Previous Experience**
   * **Previous Company Name**
   * **Job Title**
   * **Duration** (Start and End Dates)
   * **Responsibilities**
   * **Reason for Leaving**
10. **Skills**
    * **Key Skills** (e.g., Microsoft Office, Programming Languages, Project Management)
    * **Proficiency Level** for each skill (Beginner, Intermediate, Advanced)

**Task 3 : Employee Details Section**

**Purpose**: This section provides an organized view of each employee’s details in table format. It allows quick access to basic information and a detailed view for each employee, with easy navigation across categories.

**A. Employee Table Overview ( sub task 1)**

1. **Table Structure**:
   * Columns:
     + **Employee ID**
     + **Name**
     + **Position**
     + **Department**
     + **Date of Joining**
     + **Actions** (Show More button)
2. **Show More Button**:
   * Each row includes a **Show More** button, which opens a detailed view of the selected employee’s information.

**B. Individual Employee Details View( sub task 2)**

Once **Show More** is clicked, an individual view opens in a new box or modal displaying categorized information. This view includes a sidebar with section headings and the corresponding details on the right.

**Layout Structure**

1. **Side Table with Headings**:
   * **Personal Details**
   * **Contact Details**
   * **Job Details**
   * **File Uploads**
   * **Educational Qualifications**
   * **Family Details**
   * **Financial Details**
   * **Previous Experience**
   * **Skills**
2. **Detail View**:
   * When a category (e.g., Personal Details) is clicked on the side table, the corresponding information displays on the right, with an **Edit** button for modifications.

**Sections and Content( sub task 3)**

1. **Personal Details**:
   * Fields: Photo, Name, Date of Birth, Gender, Marital Status, Nationality, Address, Emergency Contact
   * **Photo Upload**: Allows the user to upload or update their profile picture.
   * **Edit Option**: Enables editing of all fields in this section.
2. **Contact Details**:
   * Fields: Personal Phone, Work Phone, Personal Email, Work Email, LinkedIn Profile
   * **Edit Option**: Allows changes to all contact information.
3. **Job Details**:
   * Fields: Employment Type, Reporting Manager, Job Location, Work Schedule
   * **Edit Option**: Allows updates to job-specific information.
4. **File Uploads**:
   * **Uploaded Documents**: List of documents with options to view or download.
   * **Upload New File**: Allows users to add new documents.
5. **Educational Qualifications**:
   * Fields: Highest Degree, Institution, Field of Study, Year of Graduation, Certifications
   * **Edit Option**: Enables adding or updating educational details.
6. **Family Details**:
   * Fields: Spouse’s Name, Children’s Details, Dependents
   * **Edit Option**: Allows updates to family information.
7. **Financial Details**:
   * Fields: Bank Account Number, Bank Name, IFSC Code, PAN Number, Salary Account Details
   * **Edit Option**: Allows modifications to financial data.
8. **Previous Experience**:
   * Fields: Previous Company Name, Job Title, Duration, Responsibilities, Reason for Leaving
   * **Edit Option**: Enables updating or adding previous job information.
9. **Skills**:
   * Fields: Key Skills with Proficiency Levels
   * **Edit Option**: Allows adding or updating skills.

**Task 4 : Daily Task Form Section**

**Purpose**: This form allows employees to log their daily tasks, tracking their work activities and ensuring accountability.

**Structure**

1. **Form Fields**:
   * **Date**: Auto-populates with the current date but can be edited.
   * **Task Title**: Short description of the task (e.g., "Client Meeting," "Report Preparation").
   * **Task Description**: Detailed description of the work completed or in progress.
   * **Start Time** and **End Time**: Records the time spent on each task.
   * **Task Status**: Dropdown with options like **Not Started**, **In Progress**, **Completed**.
   * **Priority Level**: Dropdown to mark the priority (e.g., Low, Medium, High).
   * **Upload Files**: Option to attach relevant files or documents related to the task.
2. **Submission**:
   * When employees submit the form, the data is saved and reflected in the **Daily Task Detailed List** for future reference.

**Task 5 : Daily Task Detailed List Section**

**Purpose**: This section displays a detailed list of all tasks submitted through the Daily Task Form, allowing both employees and managers to review completed and ongoing work.

**Structure and Functionality**

1. **Table View**:
   * **Columns**:
     + **Date**
     + **Task Title**
     + **Start Time - End Time**
     + **Status**
     + **Priority Level**
     + **Actions** (View Details button)
2. **View Details Button**:
   * Clicking this button opens a detailed view of the selected task, similar to the Employee Details structure.
   * Detailed view shows the **Task Description**, **Attached Files** (with options to view/download), and an **Edit** option for status or priority updates.
3. **Edit and Update**:
   * Employees and managers can update task status or priority directly from the detailed view to reflect the latest information.