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***PROEANSOFT SERVICES***

*PRODUCT – 1*

***PROTEAN TRACKER – A BILLING TRACKER.***

***(SaaS Application)***

***Keep track of your Business and Sales***

*APPLICATION TYPE: MOBILE AND WEB APP.*

PRODUCT MANAGEMENT.

1.

DEVELOPERS:

1.

2.

3.

...

QUALITY ANALYST:

1.

2.

....

***Product Description.***

Protean Sales is a Billing & Stock Tracker Software for a Small & Medium Business Owners (SMBs). PTS allows you to track personal and client information of your business.

Protean Sales Tracker help SMBs make sound investment decisions. PT tracks the Products, Orders and Sales.

With Protean Sales Tracker, your inventory billing and tracking system can grow and flex as your business scales. No more switching tools or upgrading plans. All you have to do is copy and customize one of the templates.

Remember the days you could track your ***Stock Keeping Unit*** (SKUs) in a single inventory sheet? Now you have to buy pricey enterprise plans to track your inventory, and they never quite fit. It’s hard being a small business with big business overhead.

***Requirements (FrontEnd):***

1. **Client Login (Mobile no / Email) with SSO.**

Login page with Product name and Logo at top

Username & Login Filed with Sign-in Button

Register / Signup button

powered by at bottom

1. **User Registration with Mobile / Email with Password and Verification message / Email.**

Registration page with Product name and Logo at top

Mobile no / Email

Password & Confirm Password

Company / Business Name

Business type

Business Owner name & Designation

Company Website

Company Location

Signup button

powered by at bottom

1. **Dashboard on LogOn**

*a) Left panel must be Menu bar – Hide & Show Option*

Left Panel - On Click (Menu Icon):

Home (Dashboard)

Reports

Customers

Subscriptions

Invoices & Credits

Product Catalog

Logs

Settings

Help

FAQs

Right Panel- On Right Swipe (Right to Left):

Owner Profile

*b) Dashboard must contain Invoice datas (Paid Invoice, Regular Customers,Subscribed Customers...)*

*c) Dashboard must contain Daily Report Charts / Tables.(Daily, Weekly, Monthly)*

1. **Reports**

Accounting

Revenue

Reporting - Import / Export Report Details (via , doc,xlsx, xml, pdf)

Subscribers

1. **Customers**

Customer Details - Customer ID(Primary Key)

Customer Details ( Name, Mobile, Email, Location)

Customer Choosed Payment method

Customer Reference

Net payment of Respective Customer

Unpaid payment of Respective Customer

Excessive Payment of Respective Customer

Total no of Invoices Generated of Respective Customer

Import / Export Customer Details (via , doc,xlsx, xml, pdf)

1. **Subscriptions**

Same as **Customers**....

1. **Invoices & Credits**

Total Invoices Generated ( as Reports- Daily, Weekly, Monthly, Yearly)

Invoice Details -- Primary Key

Invoice ID

Invoice Details (Cus Name, Cus Mobile,Cus Email, Cus Location)

Customer Choosed Payment method

Net payment of Respective Customer

Unpaid payment of Respective Customer in respective Invoice

Excessive Payment of Respective Customer in respective Invoice

Current Invoice Amount

Import / Export Invoice Details (via , doc,xlsx, xml, pdf)

Credits - referred to Invoice ID & Customer ID

1. **Product Catalog**

Product Plans

Coupons

Coupon Code

Offers

1. **Logs**

Payment Logs

Credit and Debit Logs

Email Logs.

1. **Settings**

Configuration

Integration

Import/Export Data

Notifications

Other Settings.

***Stock Tracker - Updation Pending.***