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ClientConnect Documentation

MADE BY

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1. Introduction

ClientConnect CRM is designed to help users manage client relationships efficiently. This documentation provides essential information for setting up the application and using its features.

2. Setup Process

Prerequisites

- PHP (v8.2)
- Composer
- MySQL

Installation Steps

1. Clone the Repository
   git clone https://github.com/Rangecr/clientconnect.git

2. Navigate to the Project Directory
   cd clientconnect

3. Install Dependencies
   composer install

4. Set Up Environment File
   cp .env.example .env

5. Generate Application Key
   php artisan key:generate

6. Run Migrations
   php artisan migrate

7. Start the Local Development Server
   php artisan serve

[Notes]

Since I prefer inserting Table and Column in database using phpMyAdmin instead of using migration in Laravel:

Here is the database setup

1. Create a new database called clientconnect
2. Select the database
3. Import the clientconnect.sql file from the repository

4. Application Usage

User Roles

- **Admin:** Full access to all features.
- **Support:** Can only manage helpdesk ticket system

Common Tasks

(Register)

- Register: Press the “Create an Account”, insert the details and choose desired role.

(Login)

- Login: Insert registered email and password, then press “Login”.

(Forgot or Change Password)

- Reset password: Press the “Forgot Password?”, then insert your registered email.
- Insert code: Insert the 6-digit code sent to your email. (15 minutes expiration)
- Change password: Insert you new password, must be different from you previous password.

(Customer)

- Add a New Customer: Navigate to the Customers section, click “Add Customer”, fill in the details, and add.
- View Customer’s Details: Press the “View Details” on a selected customer to open, view and delete the customer’s data. (You can also add log and ticket for that customer through that customer’s page)
- Delete Multiple Selected Customer: Check the checkbox to select, then press the “Delete Selected Customer”
- Filter by Date and Name: Press the “Filter by” dropdown, and select the shown filter.
- Search: Press the search input box and input any related customer’s information.
- Generate Customers Report (PDF Only): Press the “Generate Report” and select start and end date, then press “PDF”.

(Logs)

- Add a New Log: Navigate to the Logs section, click “Add Log”, fill in the details, and add.
- View Log’s Details: Press any Log, a popup modal shows up, you can view details, delete, and go to the Customer’s page that related to the log.

(Helpdesk)

- Add a New Ticket: Navigate to the Helpdesk section, click “Add Ticket”, fill in the details, and add.
- View Ticket’s Details: Press the “View Details” on a selected customer to open, view, delete, and update ticket status.
- Filter by Date and Title: Press the “Filter by” dropdown, and select the shown filter.
- Search: Press the search input box and input any related ticket’s information.