



ZONIXTEC IT SERVICES PRIVATE LIMITED

Basic Calling CRM Billing, Inventory, and Expense Management

Client Name: Ranjit

Business Units: Cobbler – Shoe Repair & Accessories

Date: 11 August 2025

Prepared By: Zonixtec It Services Private Limited

Project Overview

The client requires a **centralized admin panel** to manage and monitor three business processes. The system will include CRM functionalities, service workflow management, inventory tracking, and expense management.

1. CRM Module

- Dashboard with enquiry stats.
- Add enquiry form: Name, Number, Location, Message, Inquiry Type (Instagram/Facebook/WhatsApp), Product (Bag/Shoe).

2. Pickup & Delivery

- Assign pickup to staff.
- **Before pickup:** System sends receipt to client showing:
 - Item details & quantity.
 - Secure PIN for verification.
- Pickup person arrives → verifies PIN → collects items.

3. Service Workflow

- On arrival: take & store **before photo**, send to client.
- After work: take **after photo**, send to client.
- Client confirms work → generate final bill & send.

4. Inventory

- Track all materials in store.
- Quantity updates & low-stock alerts.

5. Expense Management



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- Add monthly expenses (date, amount, category, notes).
- Dashboard showing total monthly expenses.

General Features

- Role-based access (Admin/Staff).
- Search & filter.
- Data export (Excel/PDF).
- Mobile & desktop friendly