Complete Easy2Work CRM System - Exhaustive Module Documentation

CORE APPLICATION STRUCTURE

1. AUTHENTICATION & ACCESS CONTROL MODULE (/login)

Features:

* Multi-Company Login System
  + Company name auto-detection from subdomain
  + Company name suggestions with autocomplete
  + Dynamic database switching based on company selection
  + Support for companies: Baleen Media, Grace Scans, Easy2Work, Baleen Test
* Role-Based Access Control
  + Administrator: Full system access
  + Finance: Financial modules access
  + Leadership: Reports and analytics
  + Queue System: Queue management only
  + Standard User: Basic CRM features
* Security Features
  + Password visibility toggle
  + Input validation for all fields
  + Session management with Redux persistence
  + Automatic logout and cleanup on login
  + URL encoding for special characters in passwords

1. CLIENT & LEAD MANAGEMENT ECOSYSTEM

2.1 Lead Management Module (/LeadManager)

Core Features:

* Lead Status Management
  + New, Call Followup, Unreachable, Unqualified, Convert, Ready for Quote
  + Color-coded status indicators
  + Automatic status progression tracking
* Lead Assignment & Distribution
  + CSE (Customer Service Executive) assignment
  + Territory-based lead distribution
  + Workload balancing algorithms
* Follow-up Management
  + Scheduled follow-up dates and times
  + Automatic reminder system
  + Follow-up history tracking
  + Time-based prioritization
* Lead Scoring & Analytics
  + Lead conversion probability
  + Source effectiveness tracking
  + Response time analytics
  + Performance metrics per CSE
* Communication Integration
  + Phone number validation
  + WhatsApp integration
  + SMS notifications
  + Email tracking

Advanced Features:

* Lead Filtering & Search
  + Date range filtering
  + Status-based filtering
  + CSE-based filtering
  + Prospect type filtering
  + Quote sent status filtering
* Data Export & Reporting
  + Excel export functionality
  + Comprehensive lead reports
  + Performance analytics
  + Conversion funnel analysis

2.3 Client Data Management (page.jsx - Main Client Form)

Client Information Management:

* Personal Details
  + Title selection (Mr., Miss., Mrs., Ms., B/o., Baby., Master., Dr.)
  + Name with search suggestions
  + Contact number with validation
  + Email address
  + Date of birth with calendar picker
  + Age calculation
  + Gender auto-detection from title
  + Address information
* Business Information
  + Company name
  + Contact person designation
  + GST number with validation
  + PAN extraction from GST
  + Business category classification
* Source Tracking
  + Lead source identification (JustDial, IndiaMart, Sulekha, LG, etc.)
  + Consultant assignment
  + Referral tracking

Advanced Client Features:

* Duplicate Detection
  + Phone number-based duplicate checking
  + Name similarity algorithms
  + Contact verification systems
* Client History
  + Previous order tracking
  + Communication history
  + Payment history
  + Service history

1. QUOTATION & ORDER MANAGEMENT SYSTEM

3.1 Advertisement Details Module (/adDetails)

Core Quotation Features:

* Rate Card Selection
  + Searchable rate card database
  + Real-time rate suggestions
  + Rate validity checking
  + Automatic price calculations
* Product Configuration
  + Quantity selection with slab pricing
  + Campaign duration management
  + Additional features (Color, Bold, Tick, Semi-bold)
  + Width and height specifications for print media
* Pricing Calculations
  + Base price calculations
  + Margin percentage and amount calculations
  + GST calculations (automatic based on client GST status)
  + Feature-based price additions
  + Volume discount applications
* Quote Management
  + Multiple items per quote
  + Cart functionality
  + Item editing and removal
  + Quote numbering system

Advanced Features:

* Edit Mode
  + Quote modification capabilities
  + Version control
  + Change tracking
  + Approval workflows
* Validation Systems
  + Business rule validation
  + Price reasonability checks
  + Inventory availability
  + Lead time validation

3.2 Quote Checkout Module (checkout.jsx)

Checkout Features:

* Quote Review
  + Itemized quote display
  + Total calculations
  + Tax breakdowns
  + Terms and conditions
* PDF Generation
  + Professional quote documents
  + Company branding
  + Detailed pricing breakdowns
  + Terms and conditions inclusion
* Quote Finalization
  + Quote number generation
  + Client notification
  + Follow-up scheduling
  + Order conversion tracking

3.3 Quote Management Module (/adDetails/manageQuotes)

Quote Lifecycle Management:

* Quote Tracking
  + Paginated quote listing
  + Status tracking (Draft, Sent, Accepted, Rejected)
  + Quote search functionality
  + Batch operations
* Quote Analytics
  + Conversion rate tracking
  + Average quote value
  + Response time analysis
  + Success rate metrics

3.4 Order Creation Module (/Create-Order)

Order Processing Features:

* Order Information
  + Client selection and validation
  + Multiple delivery dates
  + Special instructions
  + Priority settings
* Financial Calculations
  + Receivable amount calculations
  + Commission calculations
  + GST handling
  + Payment term management
* Order Validation
  + Inventory checks
  + Credit limit validation
  + Approval requirements
  + Business rule compliance

Advanced Order Features:

* Multi-Date Campaigns
  + Campaign scheduling
  + Date range selection
  + Delivery calendar integration
  + Timeline management
* Consultant Integration
  + Consultant assignment
  + Commission calculations
  + Performance tracking
  + Payment management

1. RATE CARD & PRICING MANAGEMENT

4.1 Rate Entry Module (/RatesEntry)

Rate Card Management:

* Media Type Configuration
  + Newspaper, TV, Radio, Digital, Outdoor, Print Services
  + Category and subcategory management
  + Location-based pricing
  + Package definitions
* Pricing Structure
  + Base rate configuration
  + Quantity slab pricing
  + Volume discounts
  + Seasonal pricing adjustments
* Vendor Management
  + Vendor rate tracking
  + Multiple vendor support per medium
  + Cost comparison tools
  + Vendor performance tracking

Advanced Pricing Features:

* Dynamic Pricing
  + Market-based pricing adjustments
  + Demand-based pricing
  + Time-sensitive pricing
  + Promotional pricing
* Rate Validation
  + Business rule validation
  + Price reasonability checks
  + Competitive analysis
  + Approval workflows

4.2 Rate Validation Module (/rate-validation)

Quality Control Features:

* Rate Verification
  + Accuracy validation
  + Competitive benchmarking
  + Margin analysis
  + Profitability checks
* Bulk Operations
  + Mass rate updates
  + Validity extensions
  + Price adjustments
  + Archive management

1. FINANCIAL MANAGEMENT SYSTEM

5.1 Finance Entry Module (/FinanceEntry)

Transaction Management:

* Income Tracking
  + Order-based income entry
  + Payment mode tracking (Cash, Online, Cheque)
  + Client-wise payment history
  + Outstanding balance management
* Expense Management
  + Operational expenses
  + Project-specific expenses
  + Category-wise expense tracking
  + Bill attachment and management
* Payment Processing
  + Multiple payment methods
  + Partial payment handling
  + Payment scheduling
  + Reconciliation tools

Advanced Financial Features:

* Automated Calculations
  + GST calculations
  + TDS calculations
  + Commission calculations
  + Balance updates
* Invoice Generation
  + Automated PDF invoices
  + Custom templates
  + Email delivery
  + Payment tracking
* Financial Controls
  + Validation rules
  + Approval workflows
  + Audit trails
  + Error prevention

5.2 Financial Reporting Module (/Report)

Comprehensive Reporting:

* Income Analysis
  + Period-wise income reports
  + Rate card-wise income breakdown
  + Payment mode analysis
  + Client-wise revenue tracking
* Expense Analysis
  + Category-wise expense reports
  + Project expense tracking
  + Vendor payment analysis
  + Cost center reporting
* Profitability Analysis
  + Margin calculations
  + ROI analysis
  + Profit trend analysis
  + Performance metrics

Advanced Reporting Features:

* Interactive Dashboards
  + Real-time data visualization
  + Drill-down capabilities
  + Custom date ranges
  + Export functionality
* Financial Intelligence
  + Predictive analytics
  + Trend analysis
  + Variance analysis
  + Performance indicators

**6. QUEUE MANAGEMENT SYSTEM**

**6.1 Queue System Module (/QueueSystem)**

**Auto-Login System**

* Streamlined Access
  + One-click login for queue operators
  + Automatic credential management
  + Session persistence
  + Role-based access

**6.2 Queue Dashboard Module (/QueueDashboard)**

**Real-Time Queue Management**

**Customer Queue**

* Phone-based customer registration
* Position tracking
* Estimated wait times
* Service prioritization

**Drag & Drop Interface**

* Visual queue management
* Priority reordering
* Service assignment
* Status updates

**Service Categories**

* USG Scan, CT Scan, X-Ray (for medical facilities)
* Customizable service types
* Service-specific queues
* Resource allocation

**Advanced Queue Features**

**Notification System**

* Real-time updates
* FCM push notifications
* SMS notifications
* WhatsApp integration

**Analytics & Reporting**

* Wait time analytics
* Service efficiency metrics
* Customer satisfaction tracking
* Performance optimization

**Historical Data**

* Queue snapshots
* Undo/Redo functionality
* State preservation
* Activity logging

**7. EMPLOYEE & CONSULTANT MANAGEMENT**

**7.1 Employee Module (/Employee)**

**Employee Management Features**

**Personal Information**

* Complete employee profiles
* Contact information
* Emergency contacts
* Document management

**Professional Details**

* Role assignments
* Department allocation
* Reporting structure
* Skill tracking

**Access Control**

* Permission management
* Role-based access
* Module restrictions
* Activity monitoring

**7.2 Consultant Manager (/ConsultantManager)**

**Consultant Management**

**Consultant Database**

* Contact information
* Performance tracking
* Territory assignments
* Commission structures

**Performance Analytics**

* Sales tracking
* Commission calculations
* Performance metrics
* Ranking systems

**Communication Tools**

* SMS integration
* WhatsApp notifications
* Email campaigns
* Performance reports

**8. APPOINTMENT & SCHEDULING SYSTEM**

**8.1 Appointment Form Module (/AppointmentForm)**

**Appointment Management**

**Scheduling Features**

* Time period selection
* Automated scheduling
* Conflict detection
* Reminder systems

**Client Integration**

* Client search and selection
* Contact validation
* History tracking
* Preference management

**Communication**

* WhatsApp integration
* SMS notifications
* Email confirmations
* Reminder alerts

**Advanced Scheduling**

**Calendar Integration**

* Visual calendar interface
* Availability management
* Resource scheduling
* Time zone handling

**9. BUSINESS INTELLIGENCE & ANALYTICS**

**9.1 Advanced Analytics Dashboard**

**Key Performance Indicators**

**Sales Metrics**

* Revenue tracking
* Conversion rates
* Sales pipeline analysis
* Target achievement

**Operational Metrics**

* Efficiency indicators
* Resource utilization
* Service quality metrics
* Customer satisfaction

**Financial Metrics**

* Profitability analysis
* Cash flow tracking
* Cost analysis
* ROI calculations

**9.2 Predictive Analytics**

**Machine Learning Features**

**Lead Scoring**

* Conversion probability
* Quality assessment
* Risk analysis
* Prioritization algorithms

**Revenue Forecasting**

* Trend analysis
* Seasonal adjustments
* Market predictions
* Scenario planning

**10. COMMUNICATION & NOTIFICATION SYSTEM**

**10.1 Push Notification Module (/pushnotification)**

**Notification Features**

**FCM Integration**

* Real-time notifications
* Device registration
* Token management
* Delivery tracking

**Notification Types**

* Queue updates
* Payment reminders
* Appointment alerts
* System notifications

**10.2 Communication Hub**

**Multi-Channel Communication**

**WhatsApp Integration**

* Automated messages
* Daily reports
* Customer notifications
* Status updates

**SMS Gateway**

* Payment confirmations
* Appointment reminders
* Order notifications
* Marketing messages

**Email System**

* Quote delivery
* Invoice generation
* Report distribution
* Customer communication

**11. DOCUMENT & PDF GENERATION SYSTEM**

**11.1 PDF Generation Module (/generatePDF)**

**Document Types**

**Quotations**

* Professional formatting
* Company branding
* Detailed breakdowns
* Terms and conditions

**Invoices**

* GST-compliant invoices
* Payment tracking
* Custom templates
* Automated generation

**Reports**

* Financial reports
* Performance reports
* Analytics dashboards
* Custom reports

**Advanced PDF Features**

**Template Management**

* Custom templates
* Brand customization
* Layout options
* Style management

**12. UTILITY & SUPPORT MODULES**

**12.1 Common Functions Module (/utils)**

**Calculation Utilities**

**Financial Calculations**

* Margin calculations
* GST calculations
* Commission calculations
* ROI calculations

**Date & Time Utilities**

* Format conversions
* Time zone handling
* Business day calculations
* Duration calculations

**12.2 Component Library (components)**

**Reusable Components**

**UI Components**

* Custom alerts
* Toast notifications
* Success messages
* Loading indicators

**Form Components**

* Input validation
* Dropdown menus
* Date pickers
* File uploads

**12.3 Test Module (/Test)**

**Testing Environment**

**Feature Testing**

* Component testing
* Integration testing
* Performance testing
* User acceptance testing

**Data Validation**

* Input validation
* Business rule testing
* Edge case handling
* Error scenario testing

**13. PROGRESSIVE WEB APP (PWA) FEATURES**

**13.1 PWA Configuration**

**Mobile Optimization**

* Responsive Design
  + Mobile-first approach
  + Touch-friendly interface
  + Optimized layouts
  + Fast loading

**Offline Capabilities**

* Service worker implementation
* Offline data storage
* Sync mechanisms
* Cache management

**App-like Experience**

* Installation
  + Add to home screen
  + App icons
  + Splash screens
  + Full-screen mode

**14. SECURITY & COMPLIANCE**

**14.1 Security Features**

**Data Protection**

* Encryption
  + Data encryption
  + Secure communication
  + Password protection
  + Token security

**Access Control**

* Role-based permissions
* Session management
* Audit trails
* Activity logging

**14.2 Compliance Features**

**Regulatory Compliance**

**GST Compliance**

* Tax calculations
* Invoice formatting
* Return filing support
* Audit trails

**Data Privacy**

* GDPR compliance
* Data retention policies
* Consent management
* Privacy controls

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