

Project Title: DXSure CRM - Digital Software Solution

Slide 1: Project Overview

Project Name: DXSure CRM

Industry: IT & Software Services

Objective:

To build a centralized CRM system to manage:

- Client information
- Software requirements
- Ticketing system
- Payments and petty cash
- Role-based access (Admin / Employee)

Company Description:

DXSure CRM is an IT company focused on providing digital software solutions.

It maintains detailed records of clients and their software requirements, manages communication through ticketing, and streamlines internal operations via a web-based dashboard.

Slide 2: Login Module

Features:

- Secure login for Admin and Employee
- Session-based user authentication
- Role-based redirection (Admin → Admin Dashboard, Employee → Employee Dashboard)

Technology:

- JSP + MYSQL
- Bootstrap for UI
- Session handling for security

Slide 3: Admin Dashboard

Key Sections:

- **User Management:** Create, Display, Update, Delete Users
- **Client Management:** View Registered Clients, Client Payments
- **Vendor Management:** Registered Vendors, Vendor Payments
- **Finance:** Add/View Petty Cash, Employee Payments
- **Ticketing:** View Support Tickets

Interface:

- Bootstrap grid layout
- Buttons styled using `.well` and custom CSS

Slide 4: Employee Dashboard

Key Sections:

- **Client Interaction:** Enquiries, Follow-Ups, Leads
- **Vendor Handling:** Add/Register Vendors, Vendor Payments
- **Finance:** Add/View Petty Cash, Client Payment Entry
- **Support System:** Add/View Tickets
- **Employee Payments:** Entry and Display

Interface:

- Clean, responsive dashboard
- Accessible links for daily tasks

Slide 5: User Roles & Access Control

Feature Module	Admin Access	Employee Access
User Management	✓	X
Client Management	✓	✓
Vendor Management	✓	✓
Petty Cash	✓	✓
Payments	✓	✓
Ticketing	✓	✓

Slide 6: Core Features of DXSure CRM

- Maintain **client records** and their **software requirements**
- Provide a platform for **ticket-based communication**
- Enable **employee interaction** with clients and vendors
- Ensure **secure role-based dashboards**
- Handle **financial entries** like petty cash and payments
- Simplify IT service operations under one CRM

Slide 7: Screenshots (Optional)

Include visual examples of:

- Login Page

- Admin Dashboard
- Employee Dashboard
- Client Enquiry Form
- Ticketing Form

Slide 8: Future Enhancements

- Role-based authorization using Servlet Filters
- Mobile-responsive layout
- Real-time notifications for tickets
- Integrated chat or email alert system
- Graphical reports for Admin

Slide 9: Conclusion

DXSure CRM provides a complete digital solution to manage clients, software requirements, ticketing, and operations.

It is ideal for small to mid-size IT companies to improve workflow and service quality.