CRM Portal

Common Functionality

1. Login Credentials.
2. Forget Password with username.
3. Change Password from profile.
4. Push Notifications / Pop up Notifications for every role.
5. 2A Authentication with email OTP.
6. Today's Completed Jobs.
7. Job Status.
8. Your Monthly Jobs.
9. Your Job's Turn-Around-Time.
10. You're Margin Report (%).
11. IP based Tracking Block & Unblock.
12. Upload PDF tour guide and video guide.

Admin Panel

1. Admin can access all type of job list/tasks list.
2. Admin can assign a job/task to anyone (Employee / Team Leader / Manager).
3. Admin can see job status - pending job/completed job and new received jobs.
4. Admin can add / Edit / Delete / Active / Block new Employee / Team leader or manager.
5. Admin also can update job status.
6. Admin can get live job progress details by their employees.
7. Tracking job status by graphics/pie chart.
8. Tracking job records monthly.
9. Tracking job records monthly by Graphics / List.
10. View Documents and records uploaded by clients.
11. View Employees Tasks/Jobs View | Pending | Done
12. Admin can send notification to their employee for tasks related.
13. Admin can see tasks / jobs progress.
14. Admin can upload document for users wise.
15. Track time spent on tasks/Jobs.
16. Admin can track IP Address when login any type of users.

Team Leader Role

1. Team leader / Manager can access the employee's list.
2. Team leader / Manager can assign tasks to their employees as per tasks specialty.
3. Team Leader can access Pending tasks | New Job/tasks | Completed Job/Tasks | Delay Job Task list.
4. Team leaders can push notification to related employees.

5. Can see notification received by admin or employees.
6. Take proper reporting and send to job progress to admin.

Employee Role

1. They can view their assigned job/task list.
2. They can view their completed | Pending | Hold | New Job/Task.
3. Employee can apply for leave.
4. Employee can upload their educational or related documents.
5. Employee can see their pay slip, Offer Letter and other related documents.
6. Login / Logout tracking.

HR Role

1. **Employee Database**
   - Employee personal details (name, contact, address, etc.)
   - Work details (designation, department, joining date)
   - Document management (ID proof, certificates)
2. Attendance & Leave Management
   - Daily attendance tracking (manual & biometric integration).
   - Leave request & approval system.
   - Holiday calendar.
3. Payroll Management
   - Salary calculation (basic pay, bonuses, deductions).
   - Payslip generation & tax computation.
   - Bank account & payment processing integration.
4. Showing special days like birthday / job anniversary.
5. Reports & Analytics
   - Employee reports (attendance, performance, payroll)
   - Data export (Excel, PDF)
6. Notifications & Alerts
   - Email/SMS notifications for approvals, updates
   - Birthday & anniversary reminders
   - Company announcements.

Clients Role

1. Clients can Add / upload their job/task.
2. Clients can view jobs/Task Progress / Status.
3. Clients can view their completed old jobs/tasks.
4. Client can upload documents accordingly.
5. Notification Received and can also.
6. Can login with multiple devices.