

Standard Operating Procedure

# T2G

# Workroom

## Table of Contents

- 1. Introduction
- 2. Responsibility
- 3. Procedure (Project Team Member)
  - 3.1. Login and Access
  - 3.2. Accessing Dashboard
  - 3.3. Project Contribution and Tasks
  - 3.4. IT Support
  - 3.5. Productivity Report
  - 3.6. Leaves and Attendance
  - 3.7. Company Policies
- 4. Procedure (Administrator)
  - 4.1 Dashboard
  - 4.2 Customer Management
  - 4.3. Sales Management
  - 4.4. Subscriptions
  - 4.5. Expenses
  - 4.6. Projects
  - 4.7. Tasks
  - 4.8. IT Support
  - 4.9. Leads
  - 4.10. Estimates Request
  - 4.11. Knowledge Base
  - 4.12. Utilities
  - 4.13. Productivity Report
  - 4.14. Setup

## **1. Introduction**

This Standard operating procedure outlines the standard procedures for using the workroom software to manage tasks, collaborate with team members, and track project progress efficiently for a project team member.

This SOP applies to all project team members who use the workroom software as part of their job responsibilities.

## **2. Responsibility**

Project team member:

Project team members are responsible for using the features and functionalities of Workroom website effectively to facilitate Task completion, collaboration, and communication within their teams.

It is the responsibility of project team members to complete project related tasks mentioned in the Workroom website.

Tasks that are being worked on should be done enabling the timer and while checked in.

Administrator:

The administrator is responsible for using the functionality and features of the workroom website for effective management of resources, assets, sales and customers.

## **3. Procedure (Employee)**

3.1. Login and Access (<https://t2gworkroom.com/admin/authentication> )

- Navigate to Workroom website



**Tech2Globe  
WORKROOM**

## Login

Email Address

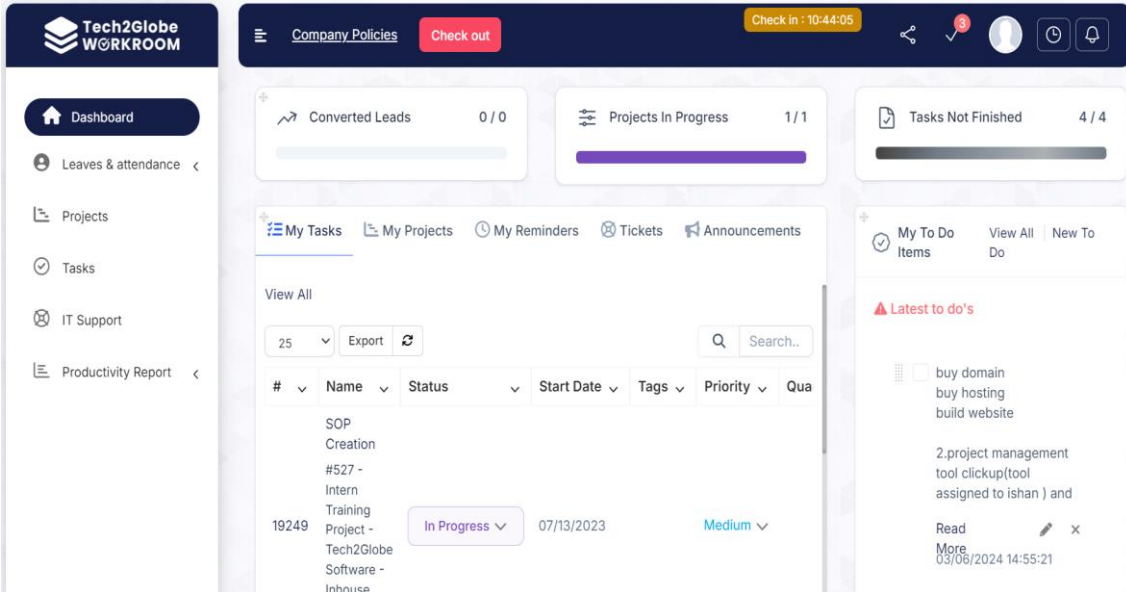
Password

☐ Remember me

Login

[Forgot Password?](#)

- Enter Login credentials.
- Press enter and gain access to workroom.



**Tech2Globe WORKROOM**

Company Policies Check out Check in : 10:44:05

Dashboard

Leaves & attendance <

Projects

Tasks

IT Support

Productivity Report <

Converted Leads 0 / 0

Projects In Progress 1 / 1

Tasks Not Finished 4 / 4

My Tasks My Projects My Reminders Tickets Announcements

View All

25 Export Search..

#	Name	Status	Start Date	Tags	Priority	Qua
19249	SOP Creation #527 - Intern Training Project - Tech2Globe Software - Inhouse	In Progress	07/13/2023		Medium	

My To Do Items View All New To Do

Latest to do's

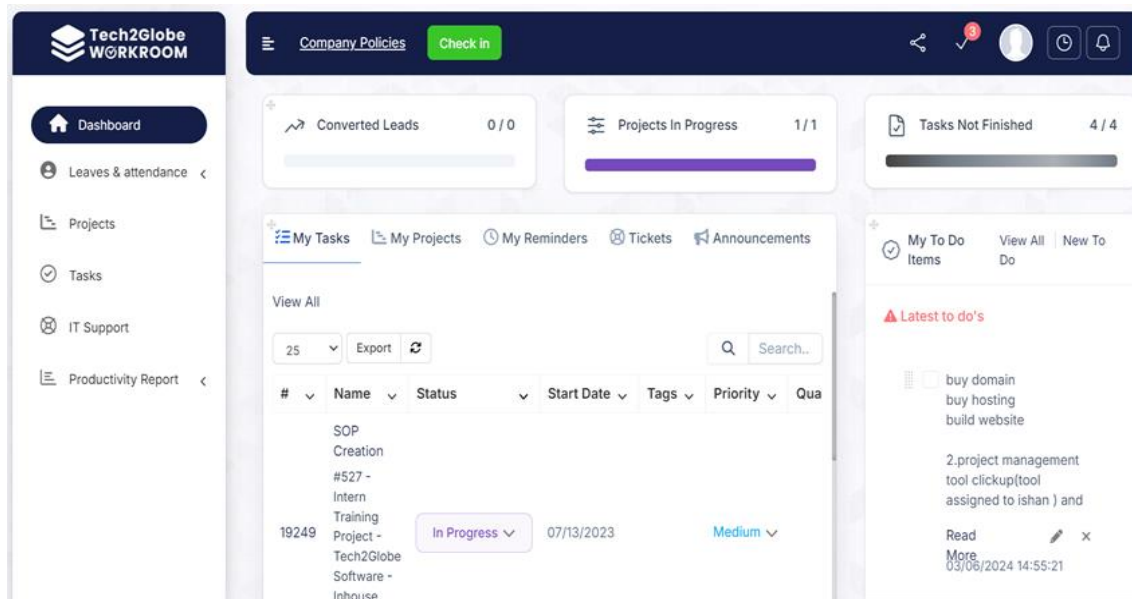
- buy domain
- buy hosting
- build website
- 2.project management tool clickup(tool assigned to ishan ) and

Read More 03/08/2024 14:55:21

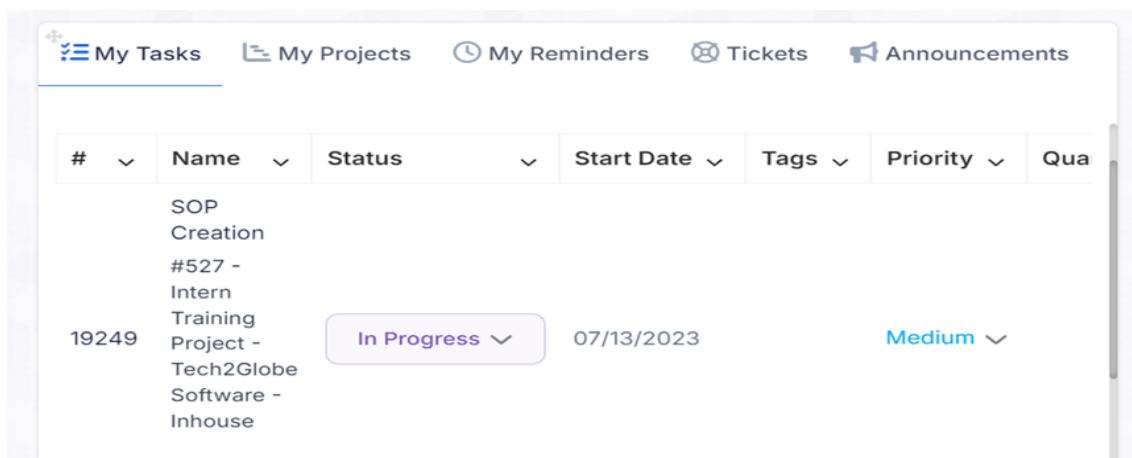
### 3.2. Accessing Dashboard (<https://t2gworkroom.com/admin/> )

- Upon logging in, you will be directed to the dashboard section of the Workroom app.
- The dashboard provides an overview of your active projects, tasks, to do list and current check in within the app and option to quick access control to projects and tasks.

- Check in/check out timings denote that the team member has checked in or checked out of the workroom and is working on given tasks or not.

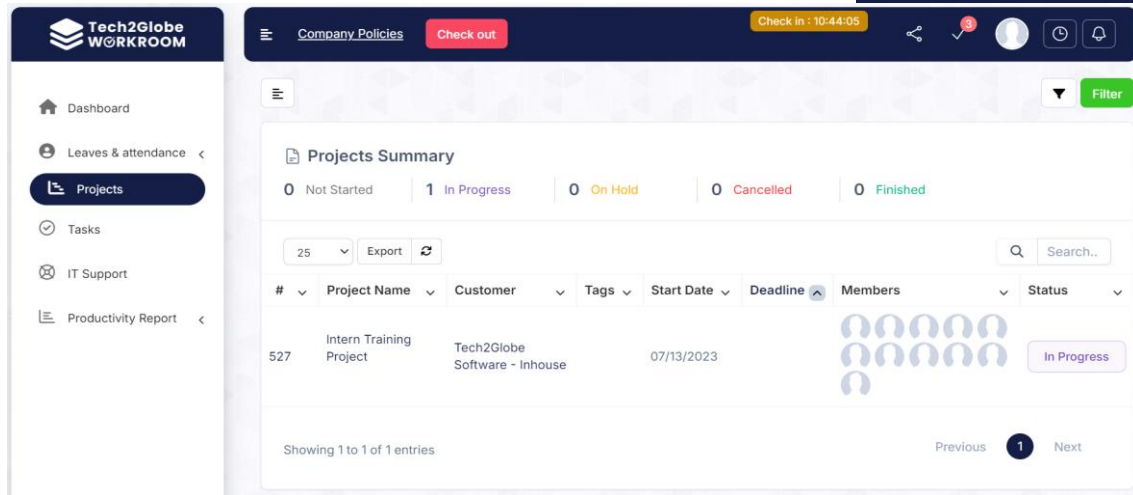


- The dashboard can be used for navigating to projects and tasks within the project and starting a task.



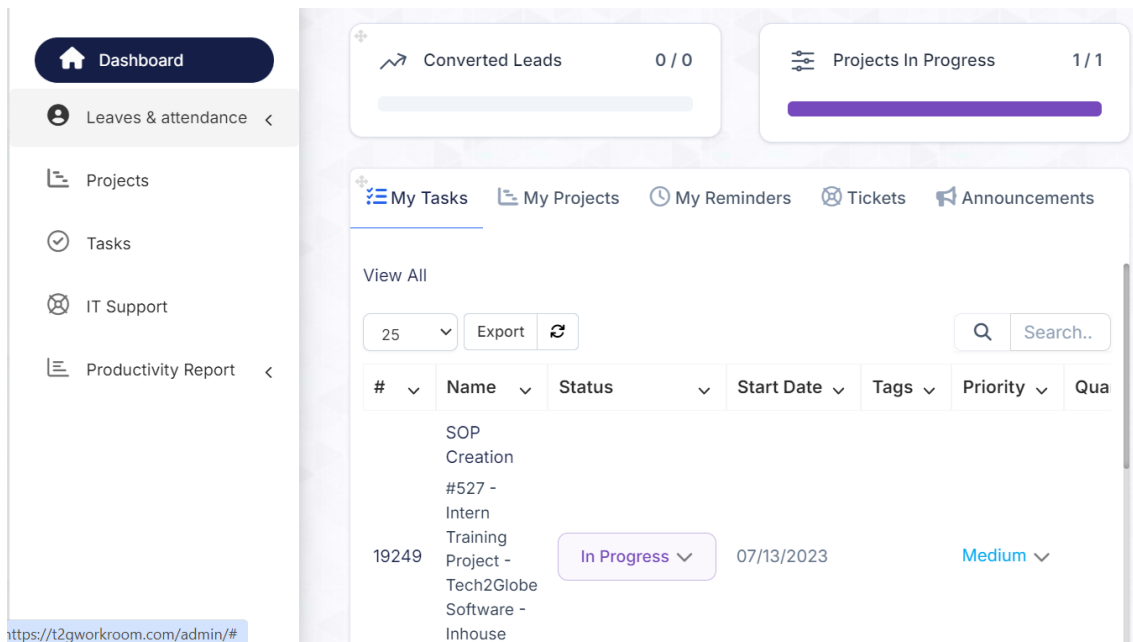
### 3.3. Project contribution and tasks (<https://t2gworkroom.com/admin/projects> )

- Projects assigned to a team member can be viewed and worked on by selecting the projects option from the dashboard.




The screenshot shows the Tech2Globe WORKROOM dashboard. The left sidebar contains navigation links: Dashboard, Leaves & attendance, Projects (highlighted), Tasks, IT Support, and Productivity Report. The top header includes a 'Check out' button and a 'Check in' timer showing 10:44:05. The main content area displays the 'Projects Summary' section with a status bar: 0 Not Started, 1 In Progress, 0 On Hold, 0 Cancelled, and 0 Finished. Below this is a table with columns: #, Project Name, Customer, Tags, Start Date, Deadline, Members, and Status. The table shows one entry: Project #527, 'Intern Training Project', by 'Tech2Globe Software - Inhouse', starting on 07/13/2023, with 6 members and a status of 'In Progress'. A 'Filter' button is in the top right, and pagination shows 'Showing 1 to 1 of 1 entries'.


- Contribution to projects is done by successfully completing the tasks assigned to you. Tasks are found in “Tasks” section of the dashboard.



The screenshot shows the Tech2Globe WORKROOM dashboard with the 'My Tasks' section selected. The left sidebar is the same as the previous screenshot. The top header shows 'Converted Leads' (0 / 0) and 'Projects In Progress' (1 / 1) with progress bars. The 'My Tasks' section has tabs for My Tasks, My Projects, My Reminders, Tickets, and Announcements. Below the tabs is a 'View All' section with a table. The table has columns: #, Name, Status, Start Date, Tags, Priority, and Qu. The table shows one task: #19249, 'SOP Creation #527 - Intern Training Project - Tech2Globe Software - Inhouse', with a status of 'In Progress', start date of 07/13/2023, and priority of 'Medium'. A search bar and 'Export' button are at the top of the table. The URL 'https://t2gworkroom.com/admin/#' is visible at the bottom left.

- Tasks can also be found by navigating and opening project section and checking the “Tasks” section.





[Company Policies](#)
Check out
Check in : 10:44:05

🔗
✓
👤
🕒
🔔

[Dashboard](#)

[Leaves & attendance](#)

[Projects](#)

Tasks

[IT Support](#)

[Productivity Report](#)

+ New Task
Tasks Overview
Filter

### Tasks Summary

3 **Not Started**  
Tasks assigned to me: 0


62 **In Progress**  
Tasks assigned to me: 4

0 **Testing**  
Tasks assigned to me: 0

0 **Awaiting Feedback**  
Tasks assigned to me: 0


14 **Complete**  
Tasks assigned to me: 0

25
Export Manipulation
Search..

#	Name	Status	Start Date	Due Date	Assigned to	Tags	Priority	Quantity
19249	SOP Creation #527 - Intern Training Project - Tech2Globe Software - Inhouse	In Progress	07/13/2023				Medium	

### 3.4. IT Support (<https://t2gworkroom.com/admin/tickets> )

- IT support can be availed when faced with problems regarding company software and hardware used by the project team member.
- IT support is availed by raising a ticket with the new ticket button and setting the appropriate details for the ticket in the IT support page.



[Company Policies](#)
Check out
Check in : 10:52:24

🔗
✓
👤
🕒
🔔

[Dashboard](#)

[Leaves & attendance](#)

[Projects](#)

[Tasks](#)

IT Support

[Productivity Report](#)

+ New Ticket
Filter

### Tickets Summary

8 **Open**
0 **In Progress**
0 **Answered**
0 **On Hold**
0 **Closed**

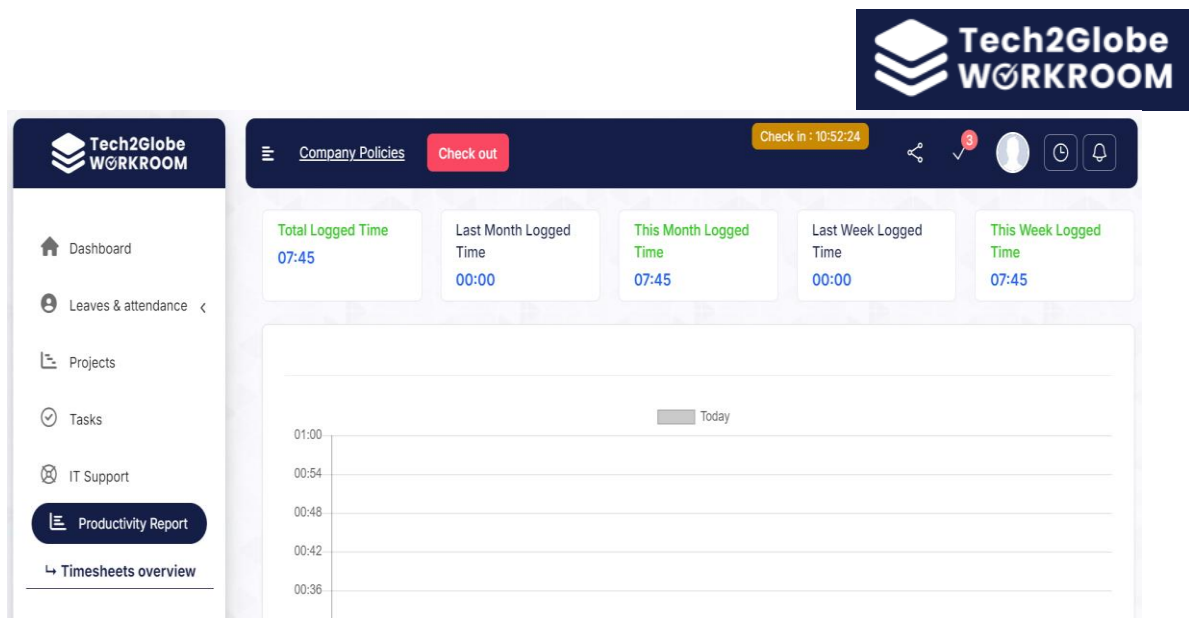
25
Export Manipulation
Search..

#	Subject	Tags	Department	Service	Contact	Status	Priority	Last Reply	Created
290	install ms office		Software-1	Software	Rishav negi	Open	High	12/14/2023 17:46:03	12/14/2023 17:06:19

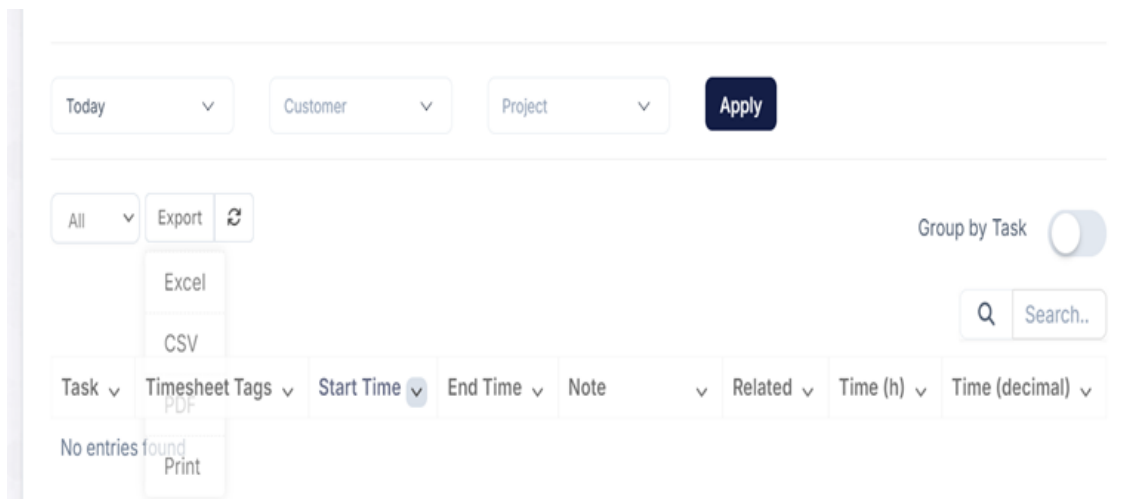
### 3.5. Productivity Report (<https://t2gworkroom.com/admin/staff/timesheets> )

- In the Productivity report section timesheets which include the time spend on the job can be viewed.



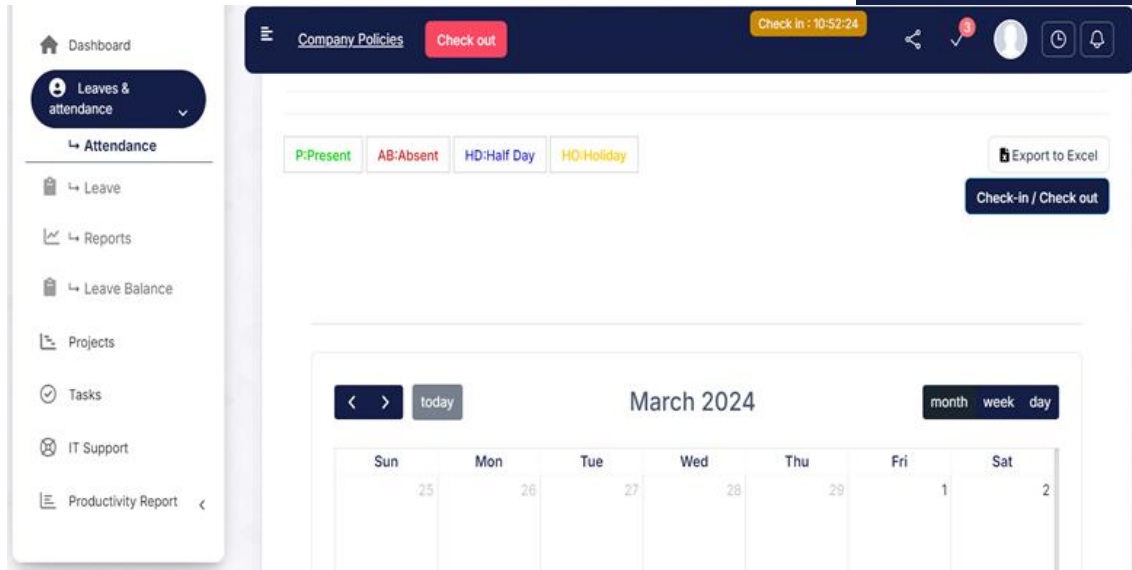


- Productivity report can be accessed by simply navigating to the productivity section and selecting the timesheets overview which provide weekly, monthly and total logged time. These timesheets can be exported in the form of hard print, CSV or as an excel sheet.

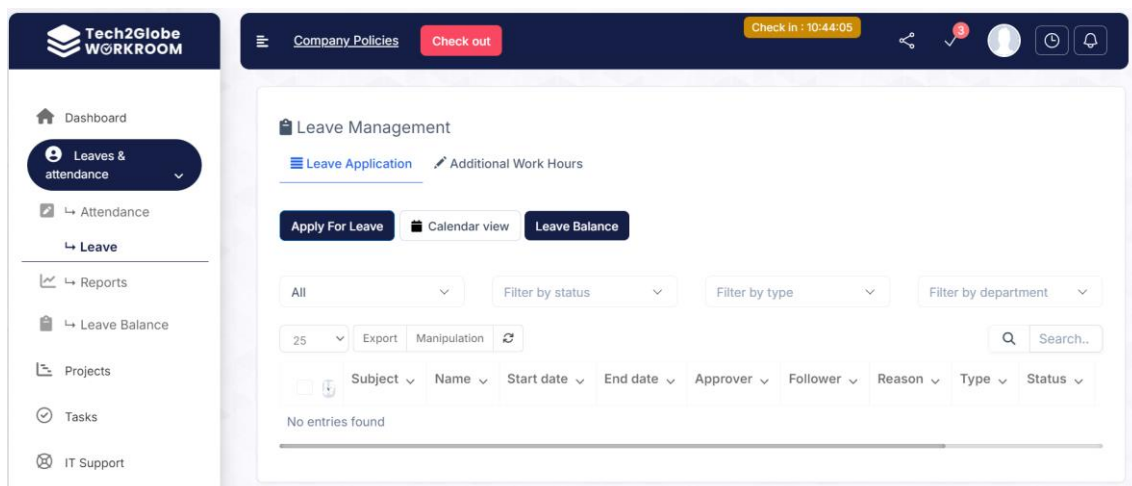


### 3.6. Leaves and Attendance

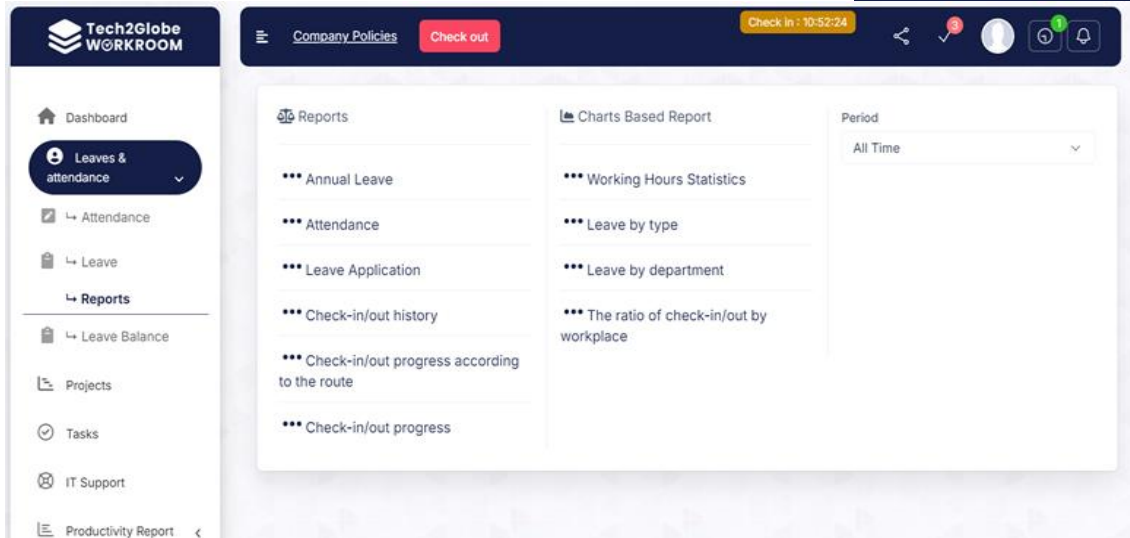
- Leaves and attendance drop down menu section include project team member attendance records, reports and remaining leaves.
- Your attendance can be viewed in the attendance section. (<https://t2gworkroom.com/admin/timesheets/timekeeping> )



- Project team member can view their leaves and apply for leaves in the leave section. ([https://t2gworkroom.com/admin/timesheets/requisition\\_manage](https://t2gworkroom.com/admin/timesheets/requisition_manage))



- Reports of attendance leaves and information regarding leaves can be viewed in reports page. (<https://t2gworkroom.com/admin/timesheets/reports>)



### 3.7. Company policies (<https://t2gworkroom.com/admin/timesheets/reports> )

- The Company policies encompass a wide range of guidelines and regulations that organizations establish to govern various aspects of their operations and project team member conduct. These policies serve to establish standards, ensure compliance with legal requirements, promote a safe and productive work environment, and protect the interests of the company and its stakeholders.
- These policies can be viewed by going to the “Company Policies” button at the top navigation bar besides the check in/check out button.

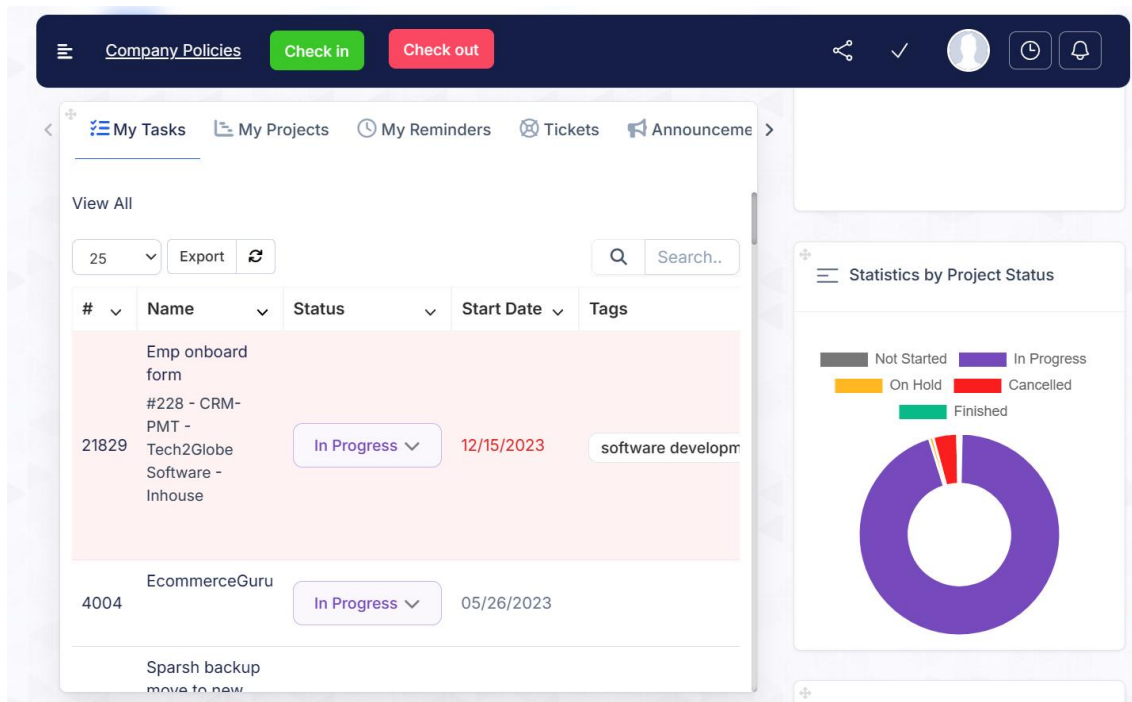


## 3. Procedure

### 3.1. Dashboard (<https://stage-crm.tech2globe.co.in/admin> )

- Dashboard shows all the options required for the administrator to perform his or her duties efficiently.

## Tasks and Project



Invoice Overview, Estimate overview and proposal overview

[Company Policies](#)
Check in
Check out

Invoice overview

0 Draft 0%
0 Not Sent 0%
0 Unpaid 0%
0 Partially Paid 0%
0 Overdue 0%
0 Paid 0%

Estimate overview

0 Draft 0%
0 Not Sent 0%
0 Sent 0%
0 Expired 0%
0 Declined 0%
0 Accepted 0%

Proposal overview

1 Draft 100.00%
0 Sent 0.00%
0 Open 0.00%
0 Revised 0.00%
0 Declined 0.00%
0 Accepted 0.00%

My To Do Items

Latest to do's
No todos found

Latest finished to do's
No finished todos found

Leads Overview

Customer
Lost Leads

Outstanding Invoices

\$0.00

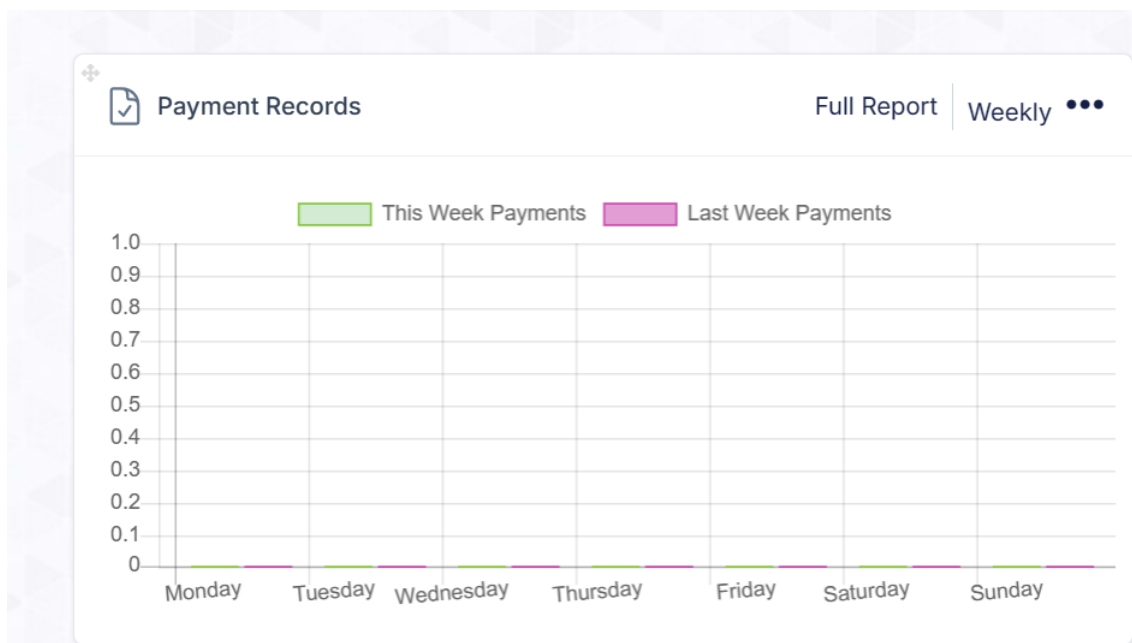
Past Due Invoices

\$0.00

Paid Invoices

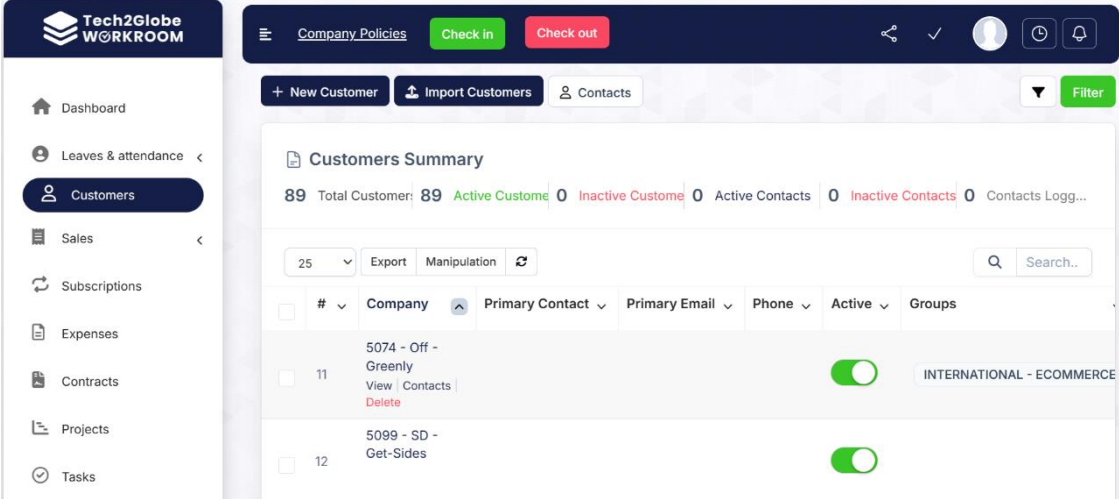
\$0.00

## Payment Records



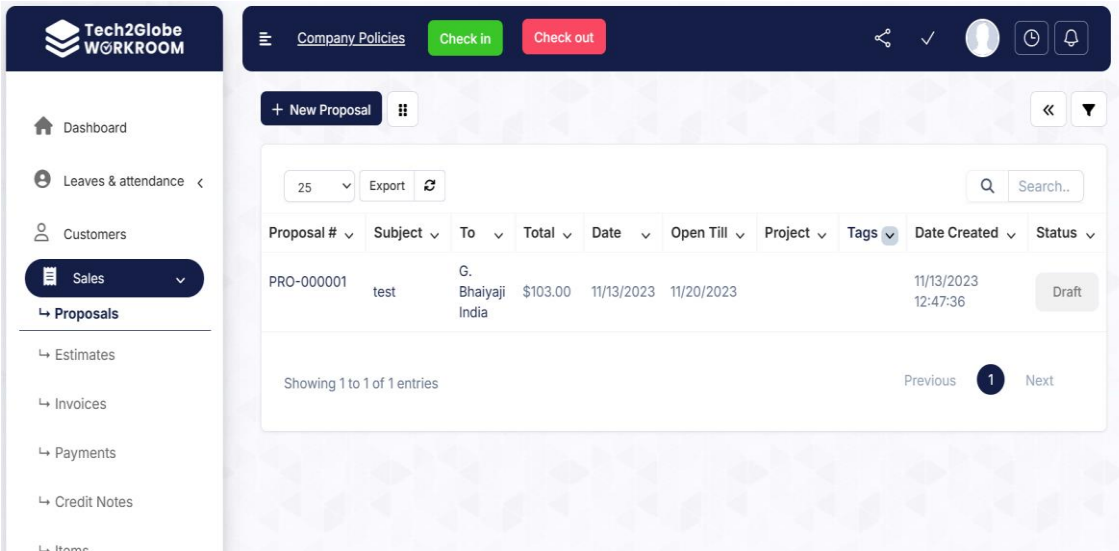
### 3.2. Customer Management (<https://stage-crm.tech2globe.co.in/admin/clients> )

- This section includes status of customer's record.
- New customers can be added with new customer at the top of the page by clicking on it and filling in the necessary details. The customer record can be exported in form of pdf with export button.

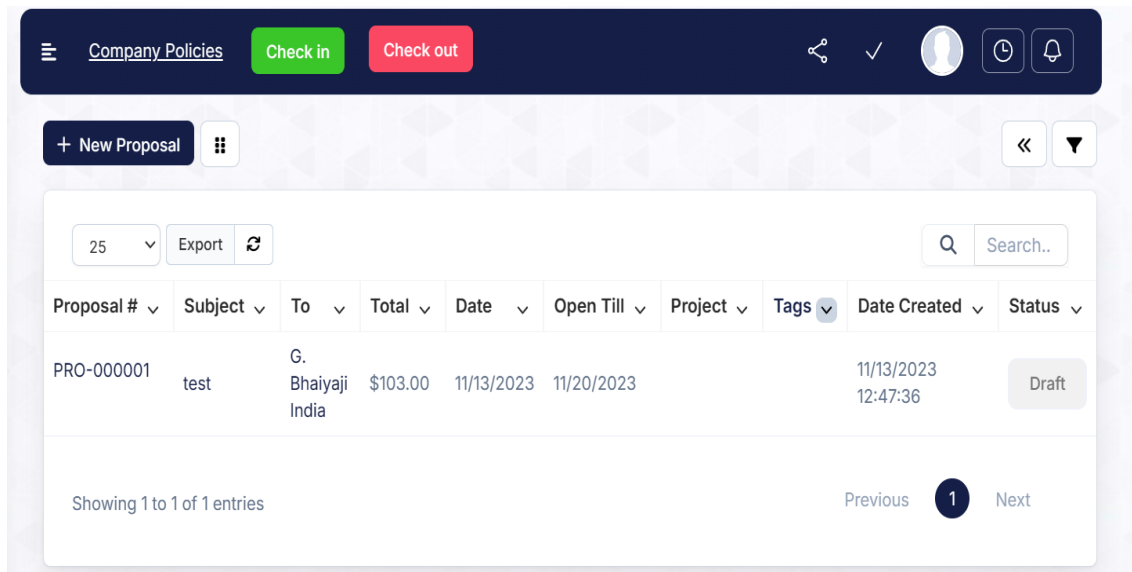


### 3.3. Sales Management

- The Sales drop down section includes sales proposal, estimates, invoices, payments, Credit notes and item invoices.

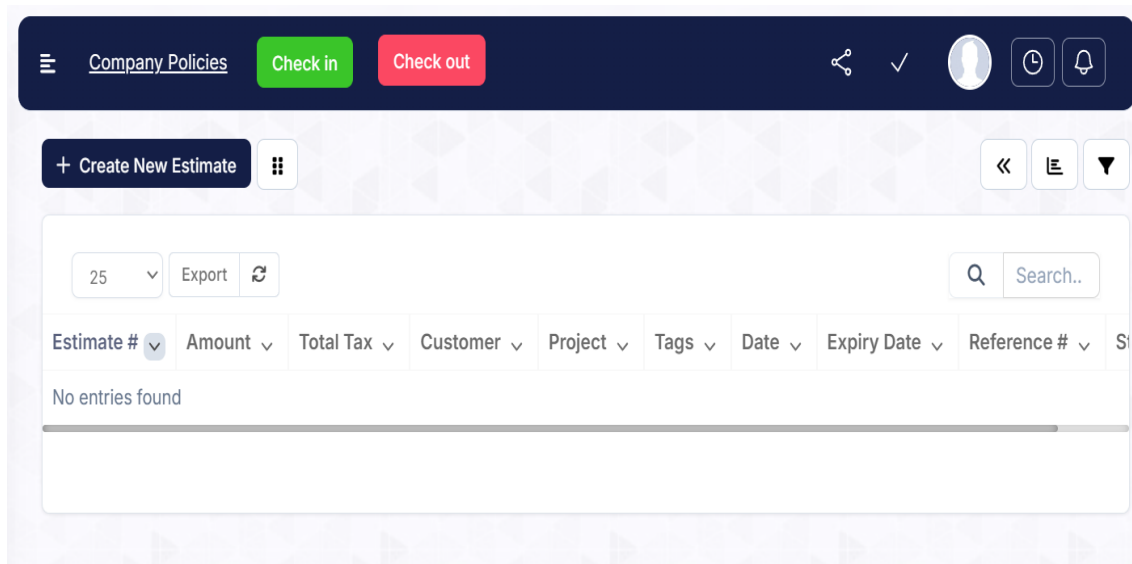


- Sales Proposals can be viewed and added with the help of proposal section in the drop down menu of Sales. ( <https://stage-crm.tech2globe.co.in/admin/proposals> )



Proposal #	Subject	To	Total	Date	Open Till	Project	Tags	Date Created	Status
PRO-000001	test	G. Bhaiyaji India	\$103.00	11/13/2023	11/20/2023			11/13/2023 12:47:36	Draft

- Estimates of sales can be created in the “Estimates” section.( <https://stage-crm.tech2globe.co.in/admin/estimates> )



Estimate #	Amount	Total Tax	Customer	Project	Tags	Date	Expiry Date	Reference #	Status
No entries found									

- Payment invoices can be viewed and created at the “Invoices” section with options to filter and export payment information. ( <https://stage-crm.tech2globe.co.in/admin/invoices> )

- Company Policies

Check in

Check out

+ New Credit Note

<< ▼

25 ▼

Export

Search..

Credit Note # ▼

Credit Note Date ▼

Customer ▼

Status ▼

Project ▼

Reference # ▼

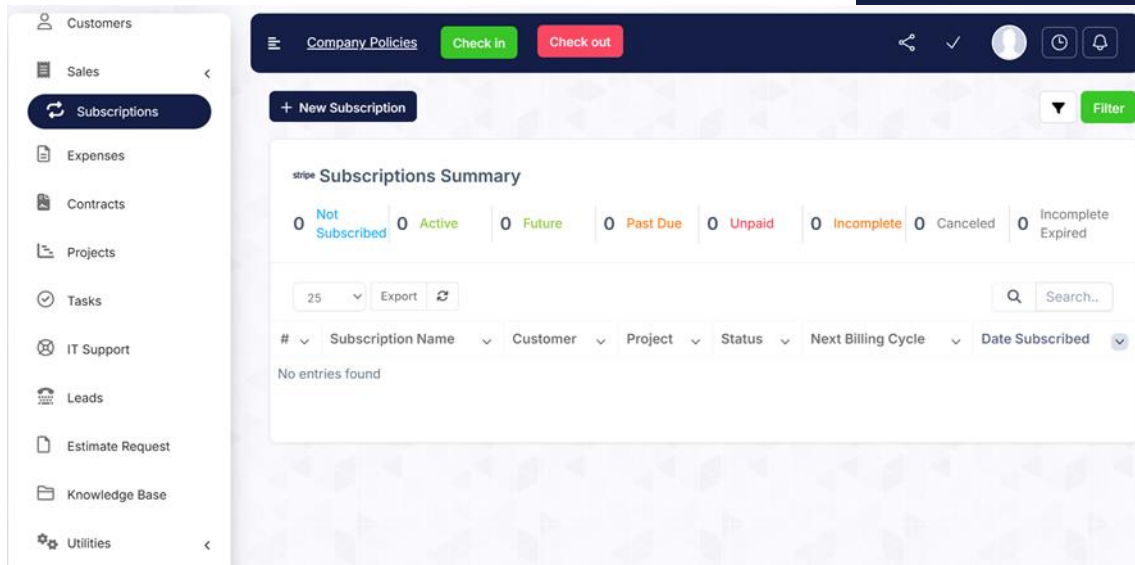
Amount ▼

Remaining Amount ▼

No entries found

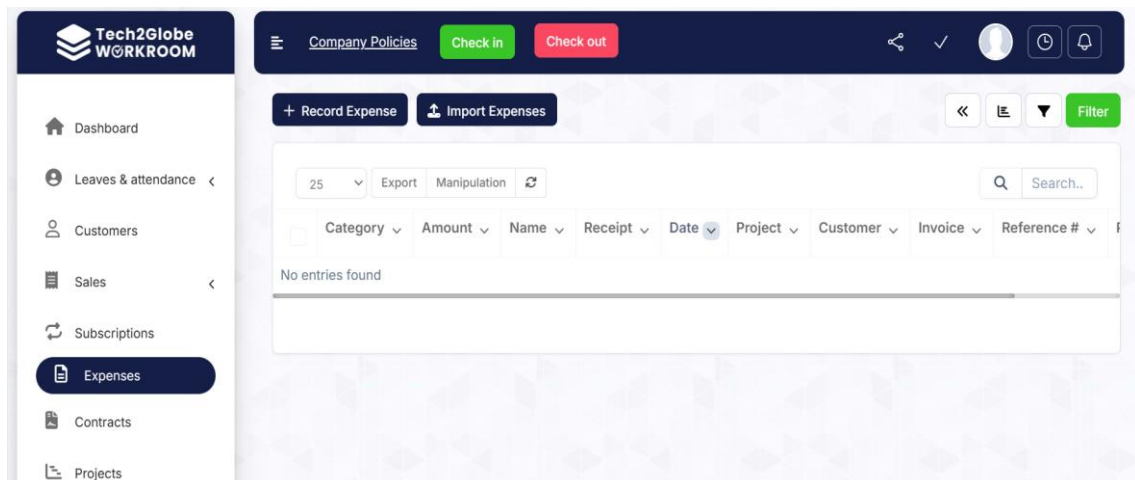
- Records of customers that are subscribed to the company product can be viewed at subscription option and new subscription can be also be added for tracking purposes.
- Subscriptions of customers can be managed in subscription section. The status of subscription can also be manipulated in the same.





### 3.5. Expenses (<https://stage-crm.tech2globe.co.in/admin/expenses> )

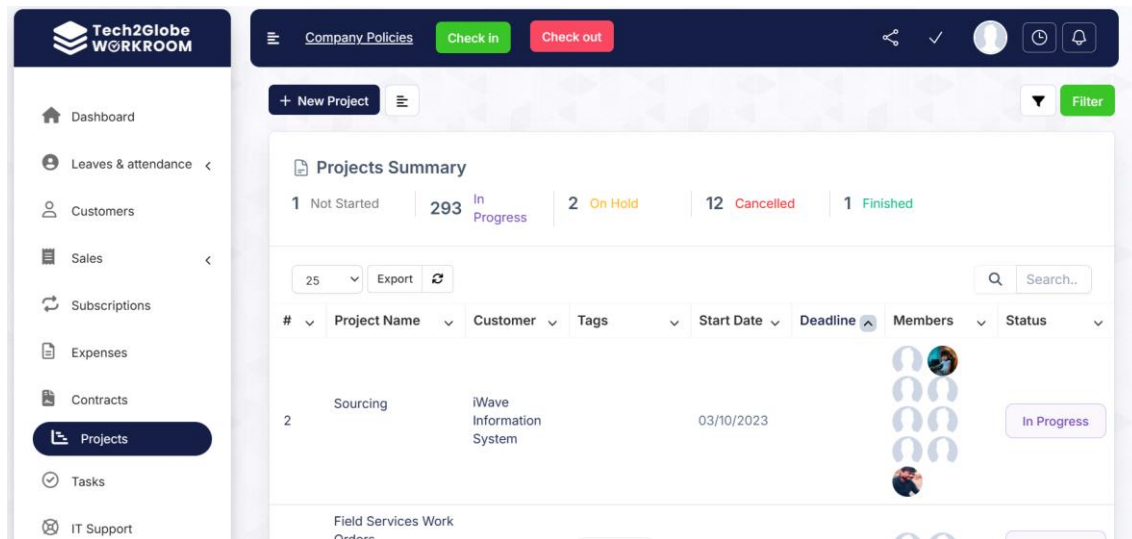
- Expenses incurred by employees or representatives of the company during business-related activities are documented in the expense section. Additionally bulk expenses can be imported in the form of CSV files.



### 3.6. Projects (<https://stage-crm.tech2globe.co.in/admin/projects> )

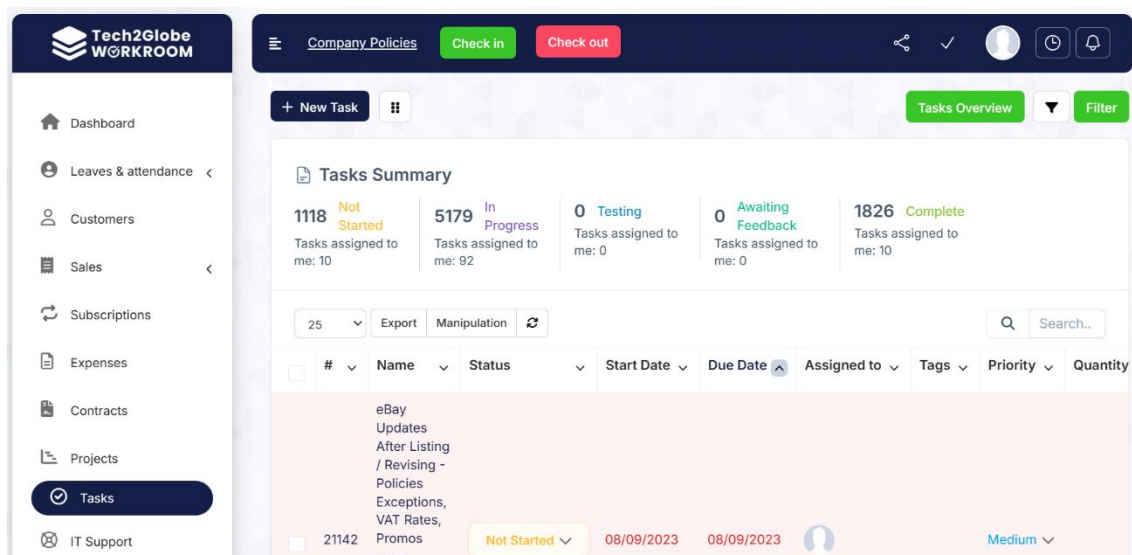
- Record of projects along with details like client, starting date member and status are included.

- The records of projects can be manipulated through this section. Addition of new record can also be done.



### 3.7. Tasks (<https://stage-crm.tech2globe.co.in/admin/tasks> )

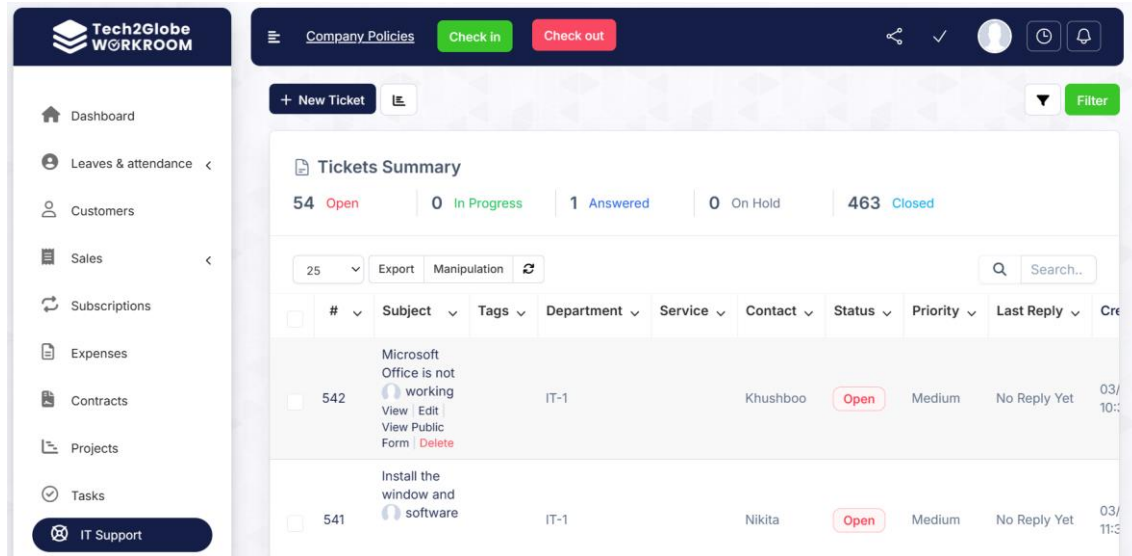
- Tasks created within projects can be manipulated in this section.
- Status of the tasks can be checked in this section.
- Tasks detail can be exported out with the help of export button.



### 3.8. IT support (<https://stage-crm.tech2globe.co.in/admin/tickets> )

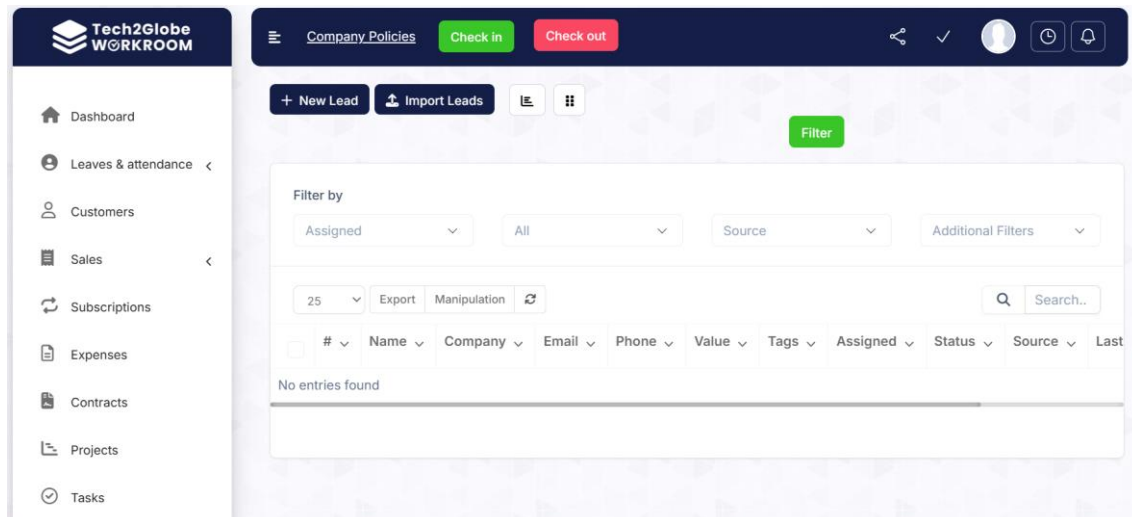
- IT support can be availed for problems regarding hardware and software.

- All the request made and completed can be viewed in this section.
- Tickets can be deleted and merged using bulk actions.



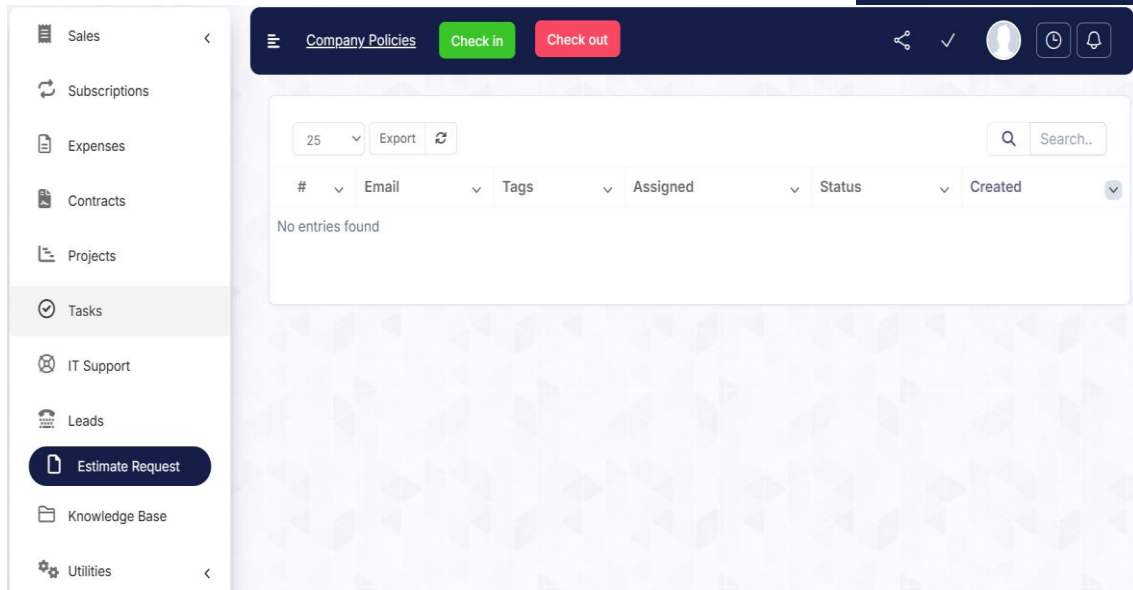
### 3.9. Leads (<https://t2gworkroom.com/admin/leads> )

- Leads contains potential client or interest shown in the company services by an organization.
- This section can be used to add potential customers and keep track of progress with them by navigating to this section.



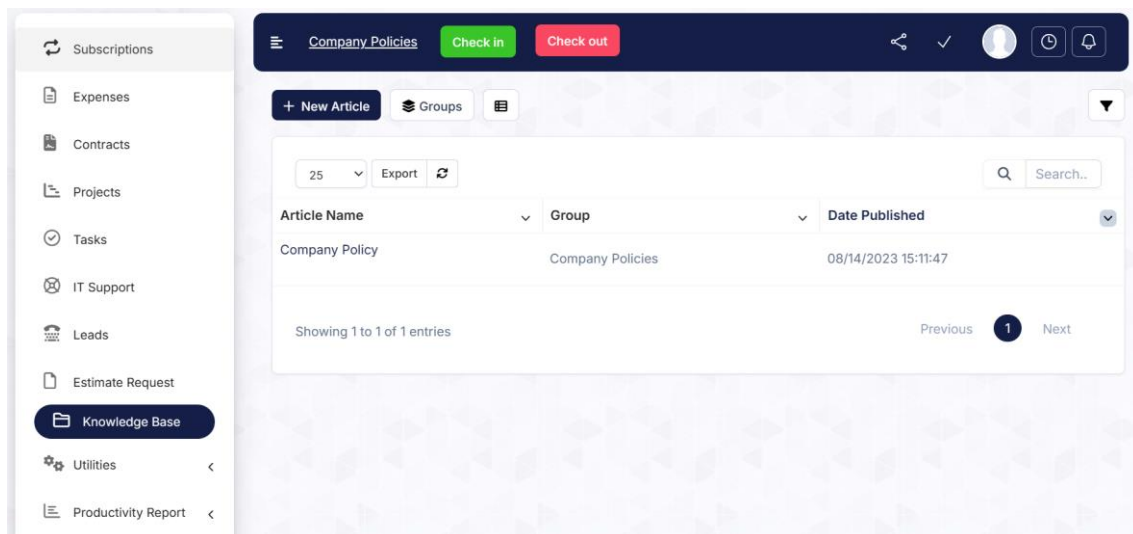
### 3.10. Estimates Request ([https://t2gworkroom.com/admin/estimate\\_request](https://t2gworkroom.com/admin/estimate_request) )

- Estimates request option is a feature that allows administrator to view request estimates send to client for specific tasks or projects.



### 3.11. Knowledge Base ([https://t2gworkroom.com/admin/knowledge\\_base](https://t2gworkroom.com/admin/knowledge_base))

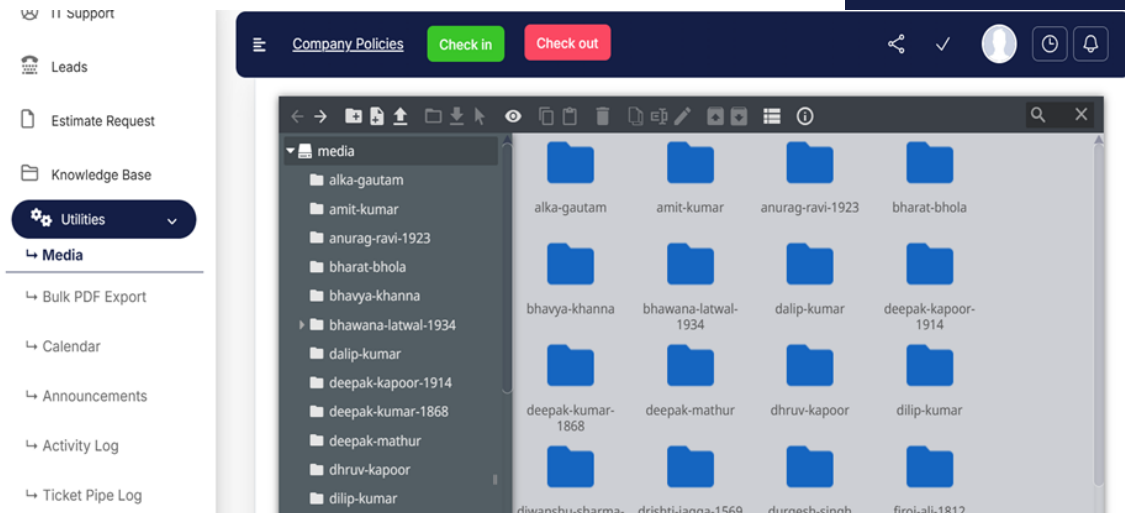
- Knowledge base contains information that is relevant to company's operations, project and resources.
- This information can be referred in case of confusion or ambiguity.



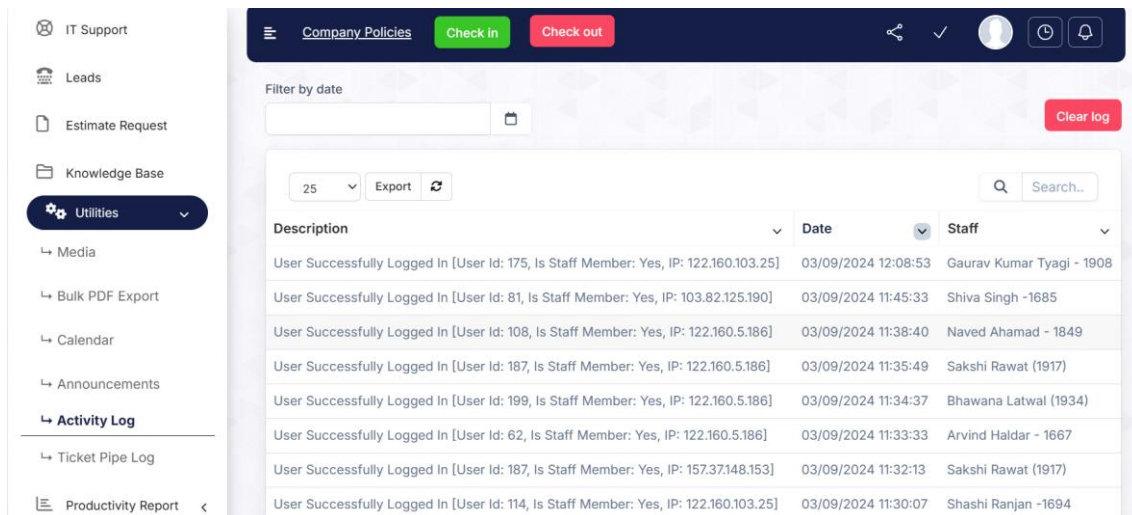
### 3.12. Utilities

- Setup includes configuration options and setting for the above mentioned section and some additional settings.

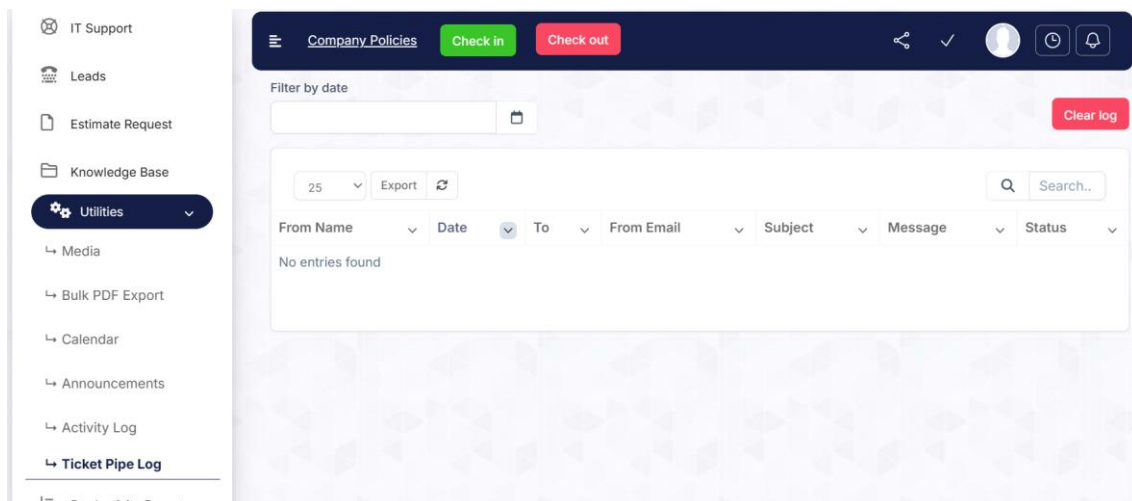
### Media Viewing



Activity log ([https://t2gworkroom.com/admin/utilities/activity\\_log](https://t2gworkroom.com/admin/utilities/activity_log))



Ticket Pipe Log

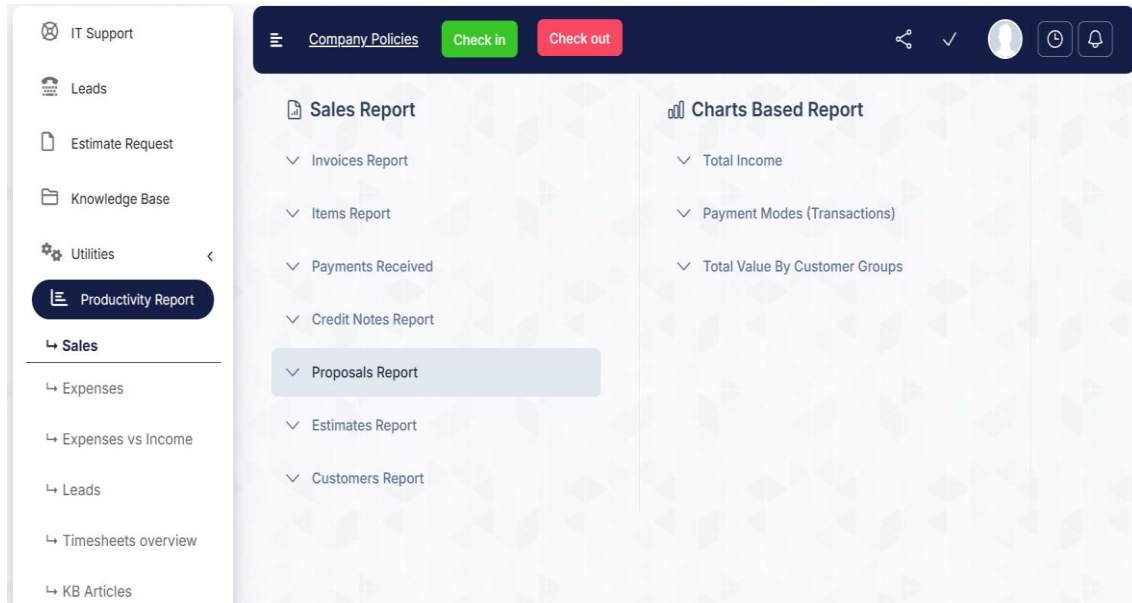


### 3.13. Productivity Report

- Productivity report menu provides you with

Sales records and data informatics.

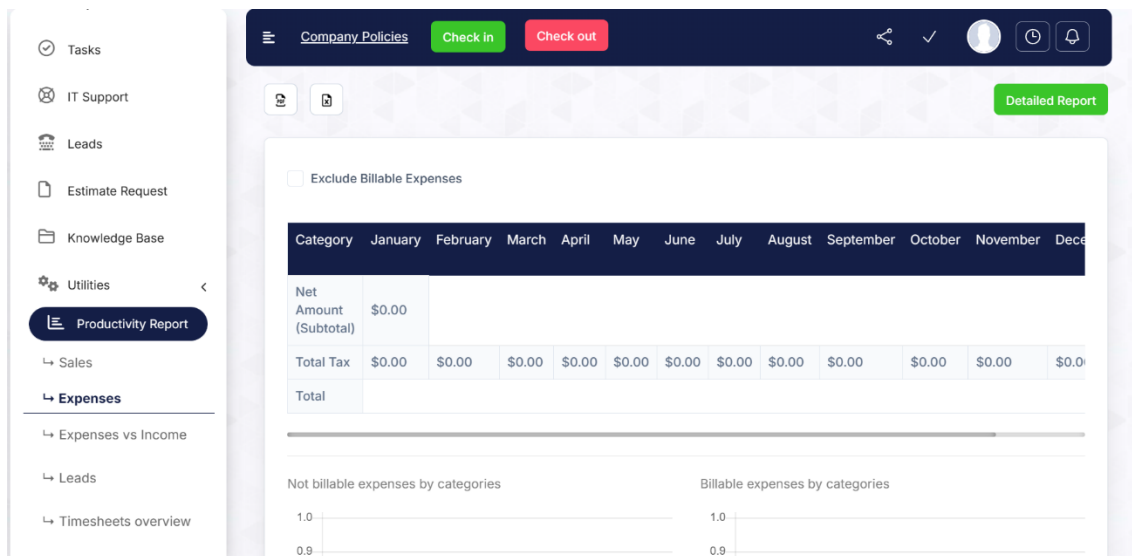
(<https://stage-crm.tech2globe.co.in/admin/reports/sales> )



The screenshot shows the 'Productivity Report' menu selected in the left sidebar. The main content area displays two columns of report options:

- Sales Report**
  - Invoices Report
  - Items Report
  - Payments Received
  - Credit Notes Report
  - Proposals Report** (highlighted)
  - Estimates Report
  - Customers Report
- Charts Based Report**
  - Total Income
  - Payment Modes (Transactions)
  - Total Value By Customer Groups

Organisation Expense Report (<https://stage-crm.tech2globe.co.in/admin/reports/expenses> )



The screenshot shows the 'Organisation Expense Report' interface. It includes a sidebar with navigation options and a main content area with a detailed report table.

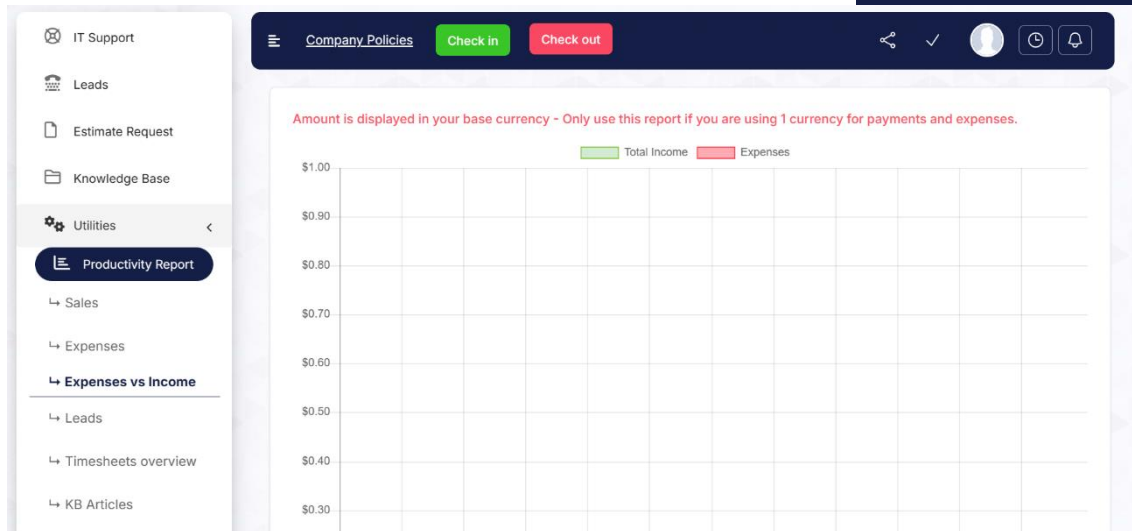
**Report Table:**

Category	January	February	March	April	May	June	July	August	September	October	November	December
Net Amount (Subtotal)	\$0.00											
Total Tax	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total												

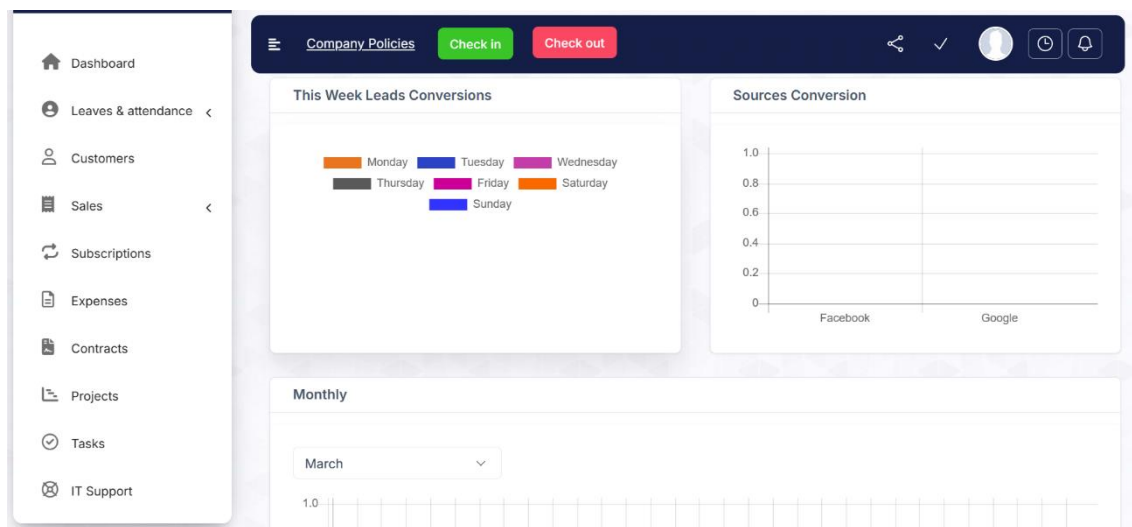
Below the table, there are two sections for visualizing expenses:

- Not billable expenses by categories:** A horizontal bar chart showing values ranging from 0.9 to 1.0.
- Billable expenses by categories:** A horizontal bar chart showing values ranging from 0.9 to 1.0.

Comparison ([https://stage-crm.tech2globe.co.in/admin/reports/expenses\\_vs\\_income](https://stage-crm.tech2globe.co.in/admin/reports/expenses_vs_income) )



Leads (<https://t2gworkroom.com/admin/reports/leads> )



#### 4.14. Setup

- Setup includes configuration options and setting for the above mentioned section and some additional settings.
- Setup section can also be used to access the help section and general accessibility settings..



