Features

"Decode CRM" covers maximum features, a modern CRM should have. It includes-

- New customer adding system
- Bulk customer importing system
- New lead adding system
- Lead > Customer conversion system
- Product & Services adding option
- New estimate creation system
- New invoice creation system
- Estimate to Invoice conversion system
- Print, download ,email estimate/invoice
- Partial / Full payment system based on invoice
- Decent Expense management system
- New employee adding system
- New task creating system
- Decent Project management system
- Ticket creation system
- Assign task to employee
- Assign project to employee
- Assign ticket to employee
- Powerful Role & Permission handling system
- Login system as admin , customer and employee
- Powerful settings
- Password changing option
- Forgot password option

Installation

In order to install the software you have to follow the following instructions.

- Before starting installation make sure that your server meets following requirements-
    1. Your server should have php version >= 7.2.0
    2. OpenSSl PHP extension should be enabled
    3. PDO PHP extension should be enabled
    4. Mbstring PHP extension should be enabled
    5. Tokenizer PHP extension should be enabled
    6. XML PHP extension should be enabled
    7. CURL should be enabled
    8. .env PHP extension should be enabled
- Download the .zip file from Codecanyone .
- Upload the downloaded file inside "public_html" folder.
- Now you have to unzip the uploaded file. You can unzip the uploaded file inside "public_html" folder, or you can create a new folder inside "publc_html" folder and unzip the file there.
- Let assume that your domain name is "abc.xyz". If you unzip the uploaded file inside "public_html" folder then your base-url will be "abc.xyz". If you create a folder, for example-"crm" inside "public_html" and unzip the uploaded file there, then your base-url will be "abc.xyz/crm".
- Now create a database and remember the database name, user name and password
- Type the base-url in the browser and hit enter. After that you will get the following page

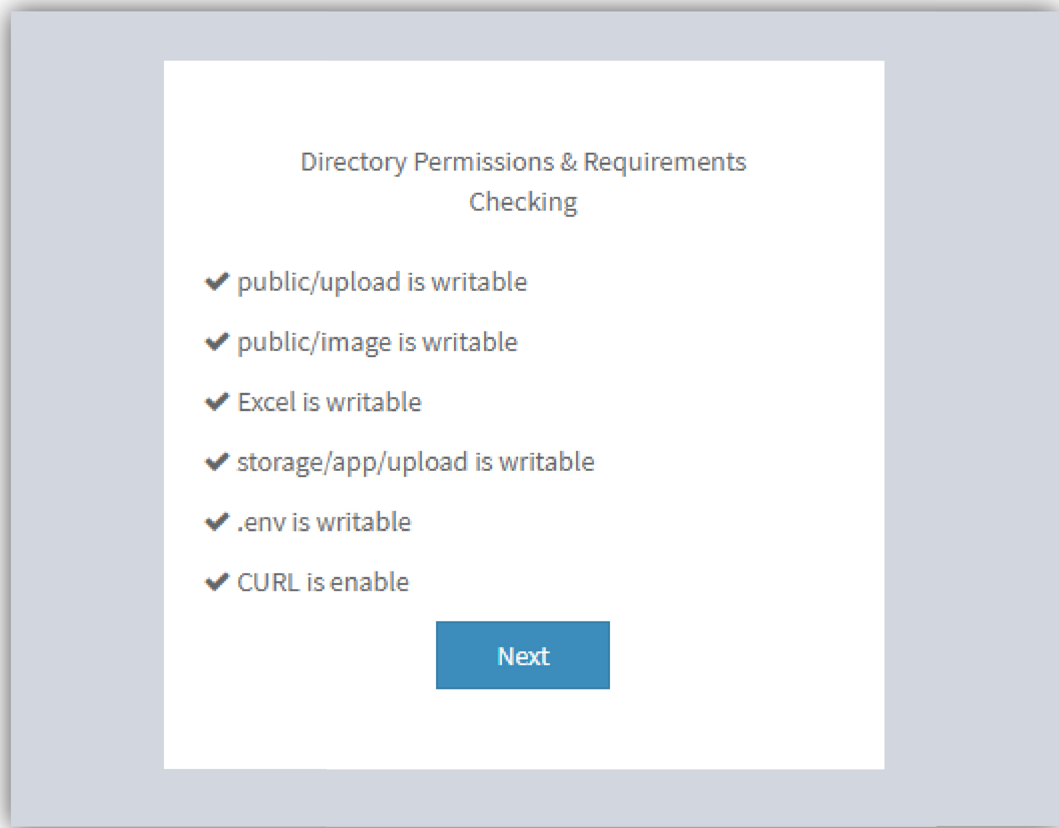


Fig-Checking Directory Permissions & Necessary Requirements

- In this part of installation, system will check directory permissions and necessary server requirements. Please click "Next" to go to the next phase of installation.
- In the next part of installation, you have to enter "Database Name", "Database User Name", "Database Password" & "Host Name". If you give correct information system will redirect you to the next phase of installation. You will have to wait some time for that

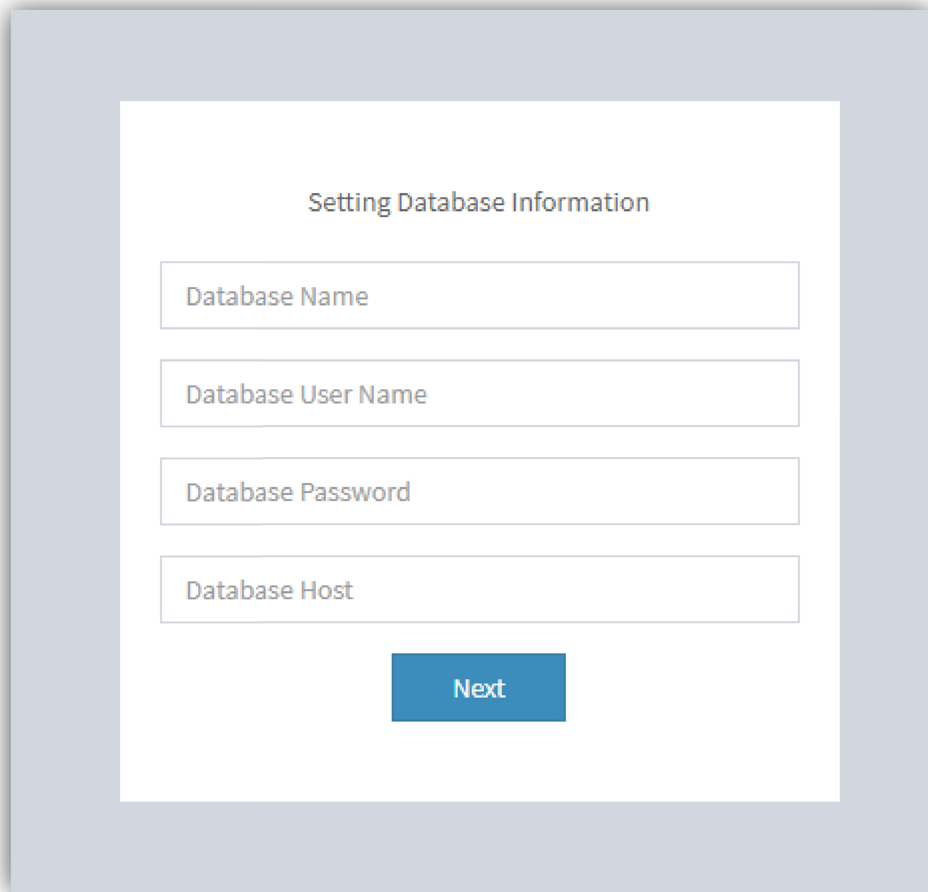


Fig- Setting Database Information

- In the last part of installation user will get supper admin registration form. Registered user will be the supper admin of this software

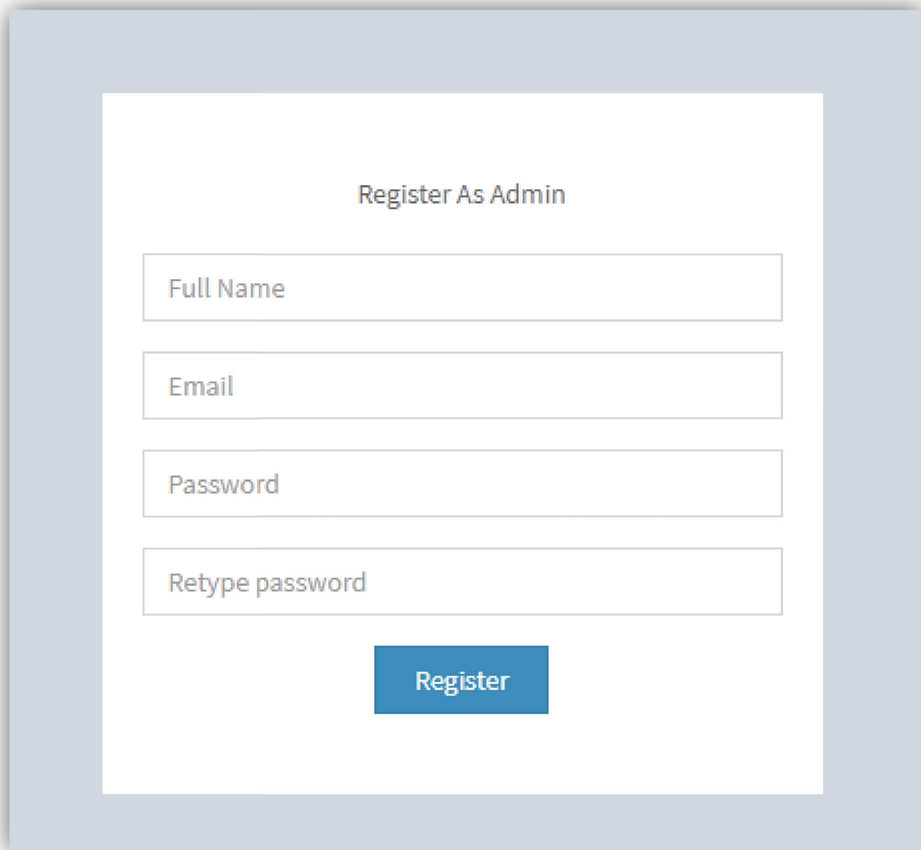


Fig- Supper Admin Registration Form

System Setup

After successfully finishing installation, this system will automatically redirect you to the dashboard. Before start using this system you can setup some necessary things, which will help you to use the software more efficiently

- You have to update your organization profile from “Settings > Organization Profile”
- You have to setup “Unit of Measurements(UOM)” which will be necessary while creating services or products
- You can setup “SMTP Details” from “Settings > SMTP Setup” if you want to send email in different occasions.
- You can setup “Tax Types” from “Settings > Tax Type” which will be using while creating invoice or estimate.
- You can setup “Invoice Terms & Conditions” from “Settings > Invoice Terms & Conditions” which will be using while showing invoice details.
- You have to setup “Expense Types” from “Settings > Expense Type” which will be using while creating different types of expenses.
- You have to setup “Ticket Status” from “Settings > Ticket Status” which will be using while creating tickets.
- You have to setup “Employee Job Status” from “Settings > Employee Job Status” which will be using while creating employee.
- You have to setup “Employee Designation” from “Settings > Designation List” which will be using while creating employee.
- You have to setup “Employee Department” from “Settings > Employee Department” which will be using while creating employee.
- **Note: You will get full documentation of how to setup above things in section -14.**

1. Dashboard

User will get dashboard details by clicking “Dashboard” button inside “Dashboard” menu.

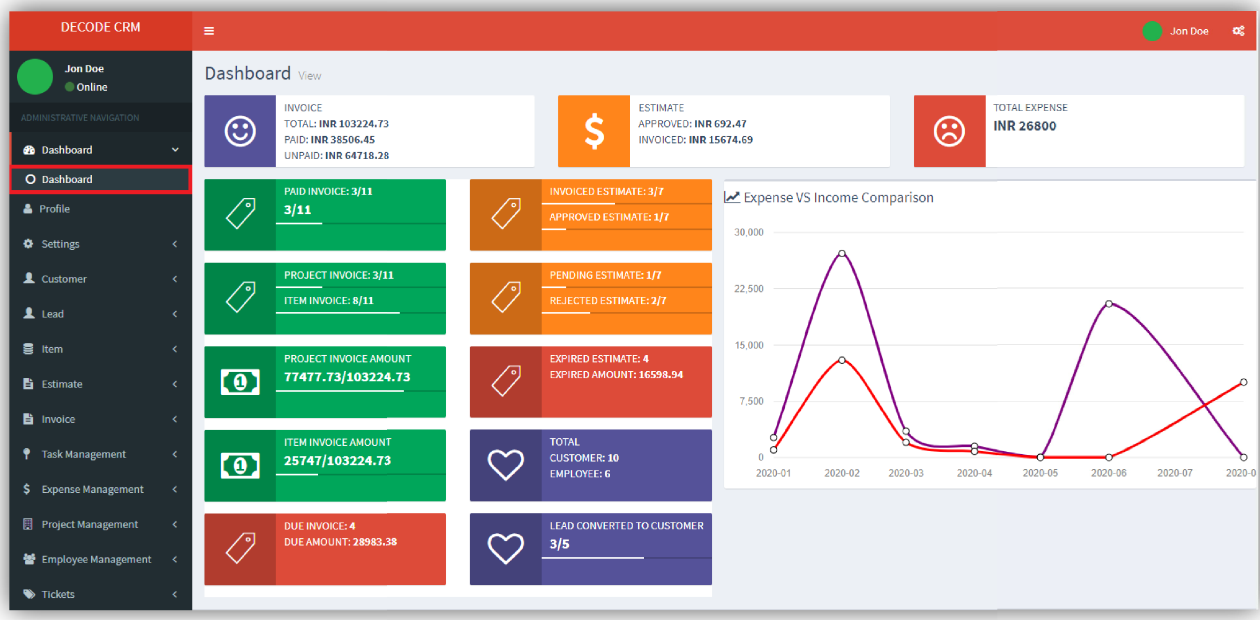


Fig 1 - Dashboard Details

2. Profile

Customer and employee will get their general profile details by clicking “Profile” button from left side menu bar.

3. Customer

User can manage (create, import, edit, delete) & see details of customer from this module. Customer module has two sections.

- Create customer
- Customer List

3.1 Create Customer

- User can create customer after clicking “Create Customer” button inside “Customer” menu.

- After clicking “Create Customer” button user will see a customer creation form. User has to fill up all the mandatory fields (marked by *).
- User can crop customer image by moving the cursor under the selected image.
- After successful creation of a customer, this system will email the login credentials to the provided email address of that customer.
- Newly created customer’s password will be “***abcdef***”.
- While creating/editing customer user has to select a language. User will get language managing page by clicking “Language List” button inside “Settings” page.

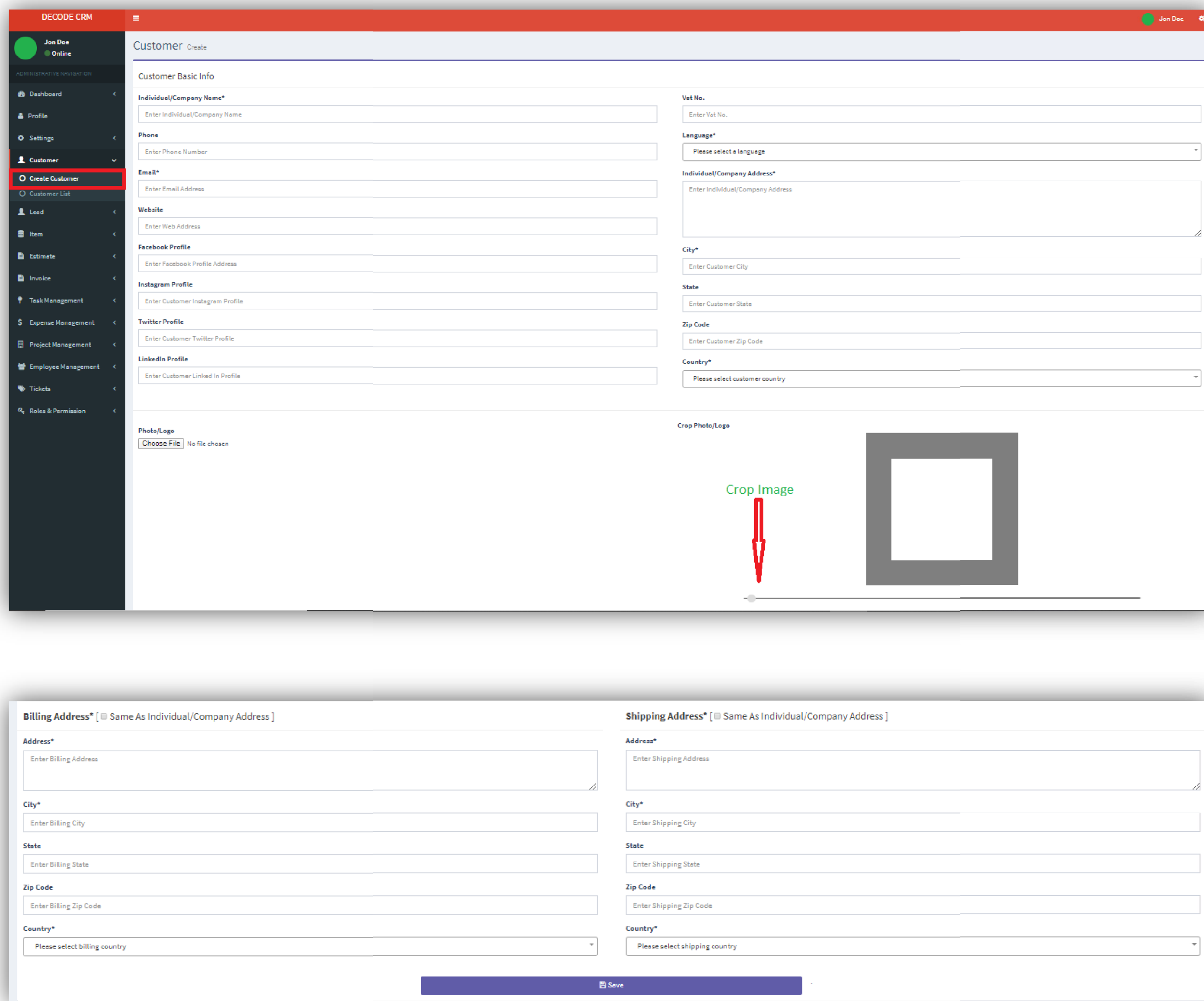


Fig 3.1 - Customer Creation Form

3.2 Customer List

- User can see the customer list by clicking “Customer List” button inside “Customer” menu.
- User can filter customer by “Customer Name”.
- User can hide/show particular column of customer list table by clicking “Column Visibility” button and then selecting a column which he wants to show/hide.
- User can see the hidden column by clicking “Plus” icon of a particular row.
- User can print or make pdf of the current page of the table by clicking “Print” or “PDF” button.
- User can edit, delete and see details of a customer by clicking edit, delete and view icon from action column of a particular row.
- Editing a customer is as same as creating a customer.
- If user edits any customer’s email address, then that customer’s password will be reset to “***abcdef***”. The login credentials will be emailed.
- In order to delete a customer, user just has to confirm that he wants to delete all the details of that customer permanently.
- User can not delete a customer if that customer has dependency on invoice/estimate/project/ticket.

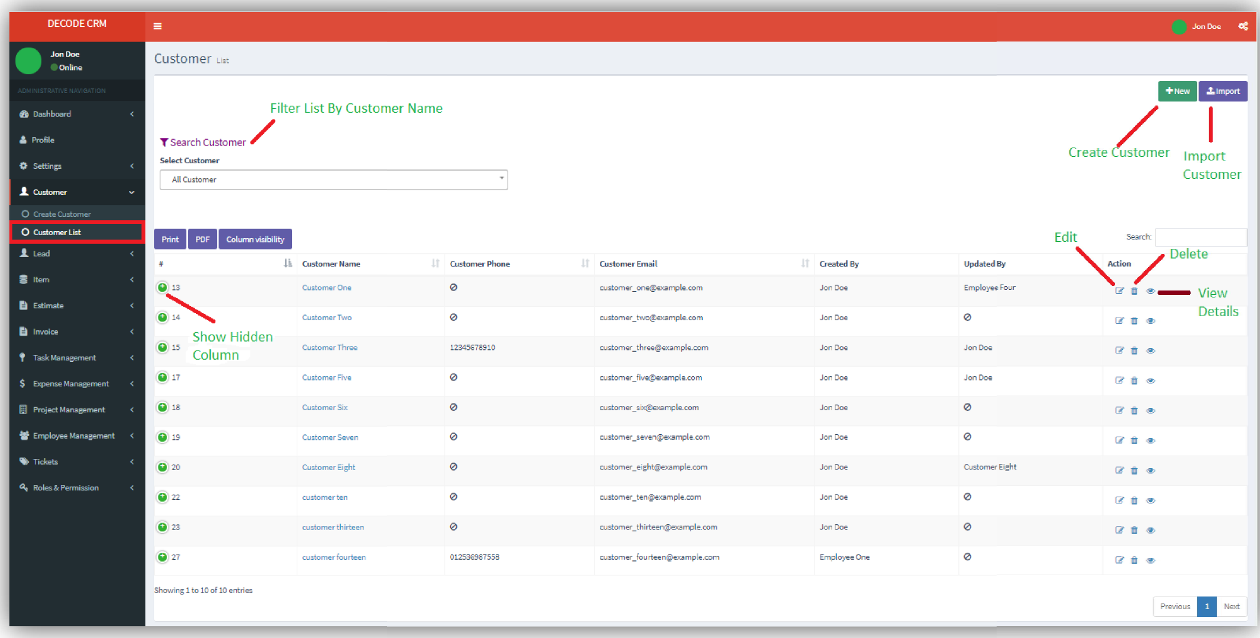


Fig 3.2 - Customer List

3.3 Import Customers

- User can import customers by clicking “Import” button and then following the rules provided in the modal box.
- In order to import customers, user has to download the example excel file from modal box and edit the file with customers’ information.
- While preparing excel file user has to fill up red colored columns, he cannot enter duplicate email.
- User will get the required country id and language id by clicking “Country List” and “Language List” button inside “Settings” page.
- User will get language managing page by clicking “Language List” button inside “Settings” page.

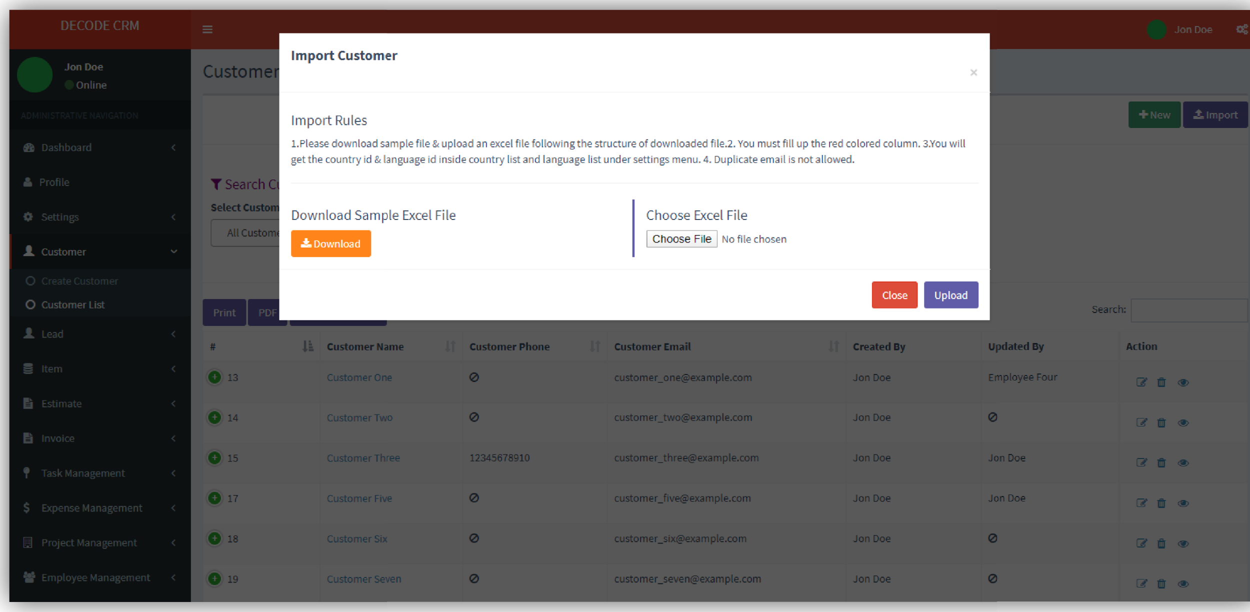


Fig 3.3 - Import Customer

3.4 Customer Details

- In order to see the details of a particular customer user has to click on “Customer Name” or “View” icon from the particular row.
- Inside customer details page, user can see, that customer’s general details, invoice details, estimate details, project details, payment details, ticket details and statement details inside “Profile General Info”, “Invoice”, “Estimate”, “Project”, “Payment”, “Ticket” & “Statement” section (more information of invoice, estimate, project, payment & ticket is given inside the documentations of these module)
- User can also search, edit, delete or see the details of invoice, estimate, project, ticket and payment details from there.
- User can generate statement of any customer by selecting a date range inside statement section.
- User can also print, download, email statement by clicking “Print”, “Download”, “Email” button after generating statement from statement section.

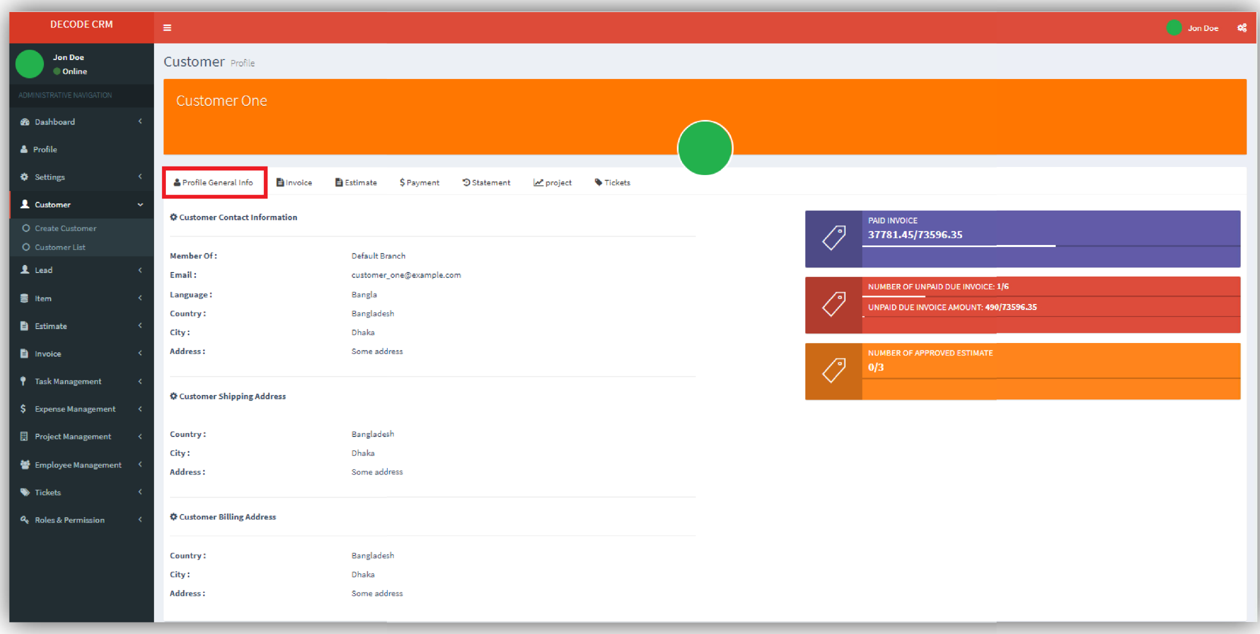


Fig 3.4 - Customer's General Details

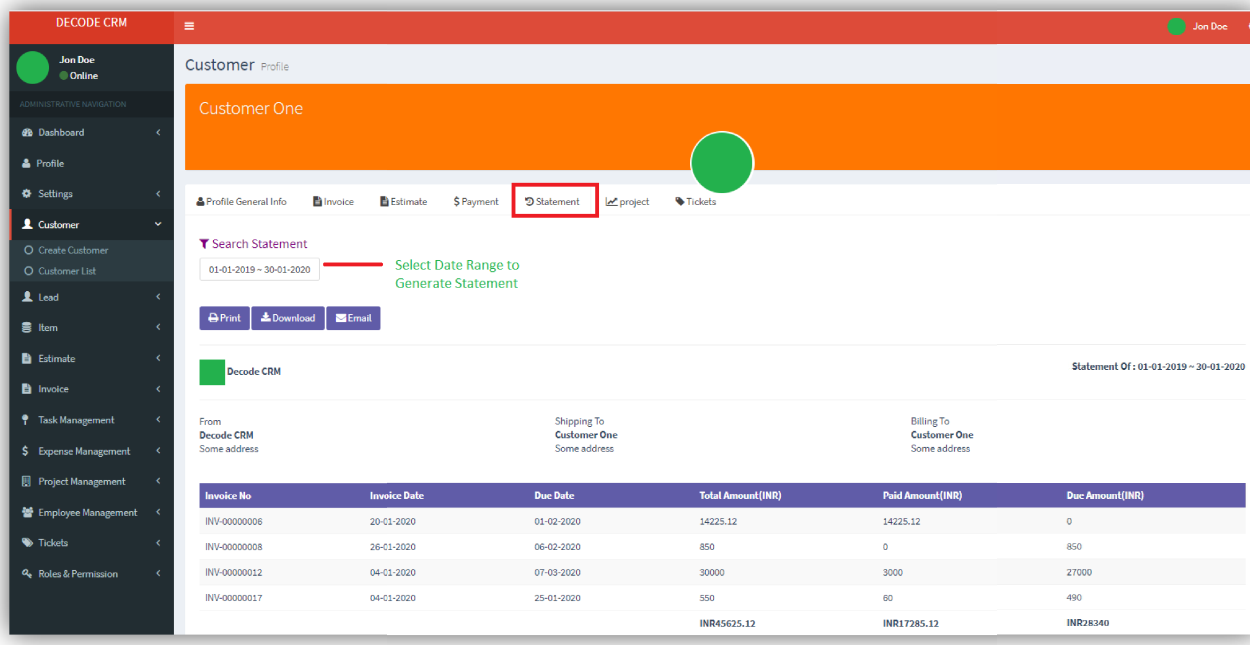


Fig 3.5 -Customer's Statement Details

4. Lead

User can manage (create, edit, delete) & see details of a lead from this module. User can also convert a lead into a customer from here. Lead module has two sections.

- Create Lead
- Lead List

4.1 Create Lead

- User can create lead by clicking “Create Lead” button inside “Lead” menu.
- After clicking “Create Lead” button user will see a lead creation form. User has to fill all the mandatory fields (marked by *).
- While creating lead user must select a lead status. User will get lead status managing page by clicking “Lead Status” button inside “Settings” page.
- While creating/editing lead, if user wants to assign that lead to a particular employee, user has to select employee from the select box. User can create employee from employee module (more information about employee module is given in its documentation section).
- User may select contact person’s language while creating/editing lead. User will get language managing page by clicking “Language List” button inside “Settings” page.

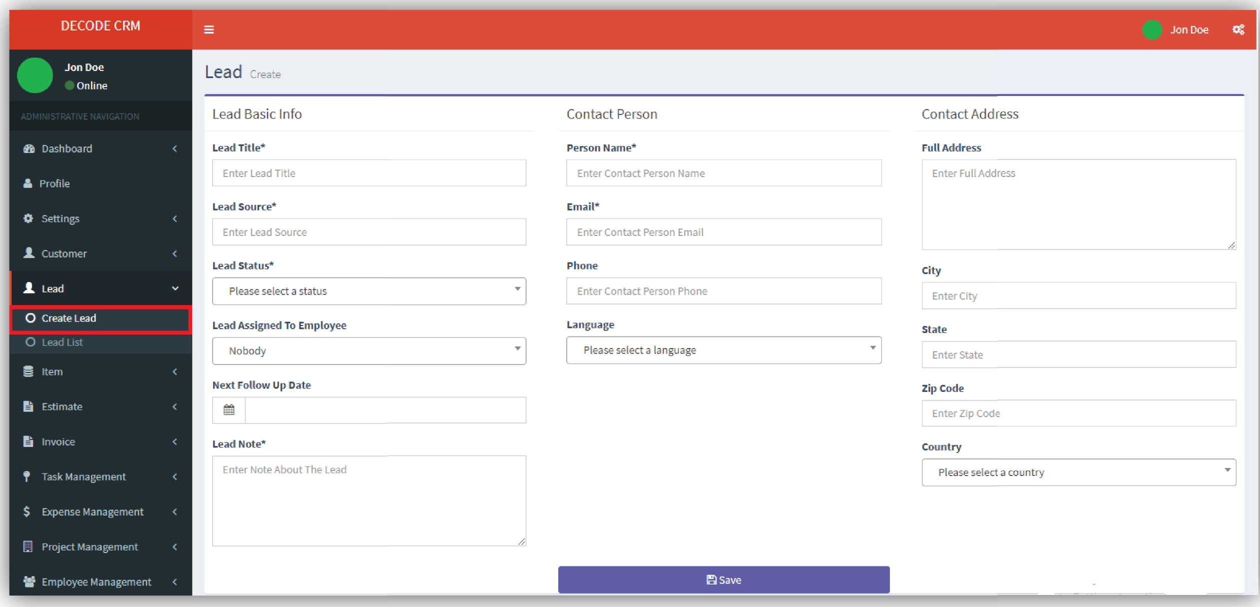


Fig 4.1 - Create Lead

4.2 Lead List

- User can see the entire lead list by clicking “Lead List” button inside “Lead” menu.
- User can filter lead list by “Assigned Employee” & “Follow up Date.
- User can hide/show particular column from the lead list table by clicking “Column Visibility” button and then selecting a column, he wants to show/hide.
- User can see the hidden column by clicking “Plus” icon of a particular row.
- User can control the number of rows per page in the table by clicking “Show * rows” and then selecting number of row.
- User can print or make pdf of the current page of the table by clicking “Print” or “PDF” button.
- User can edit, delete and see details of a lead by clicking “Edit”, “Delete” and “View” icon from action column of a particular row.
- User can also convert a lead to customer by clicking “Convert” button of a particular row.

- Before converting a customer user must update contact person name, email, language, full address, country, city of that lead.
- After conversion new customer's email will be contact person's email and password will be "***abcdef***".
- After successful conversion an email will be sent to person email address which will include login credentials.
- Editing a lead is as same as creating a lead.
- In order to delete a lead, user just has to confirm that he wants to delete all the details of that lead permanently.
- User can not edit/delete a lead which is already converted to customer.

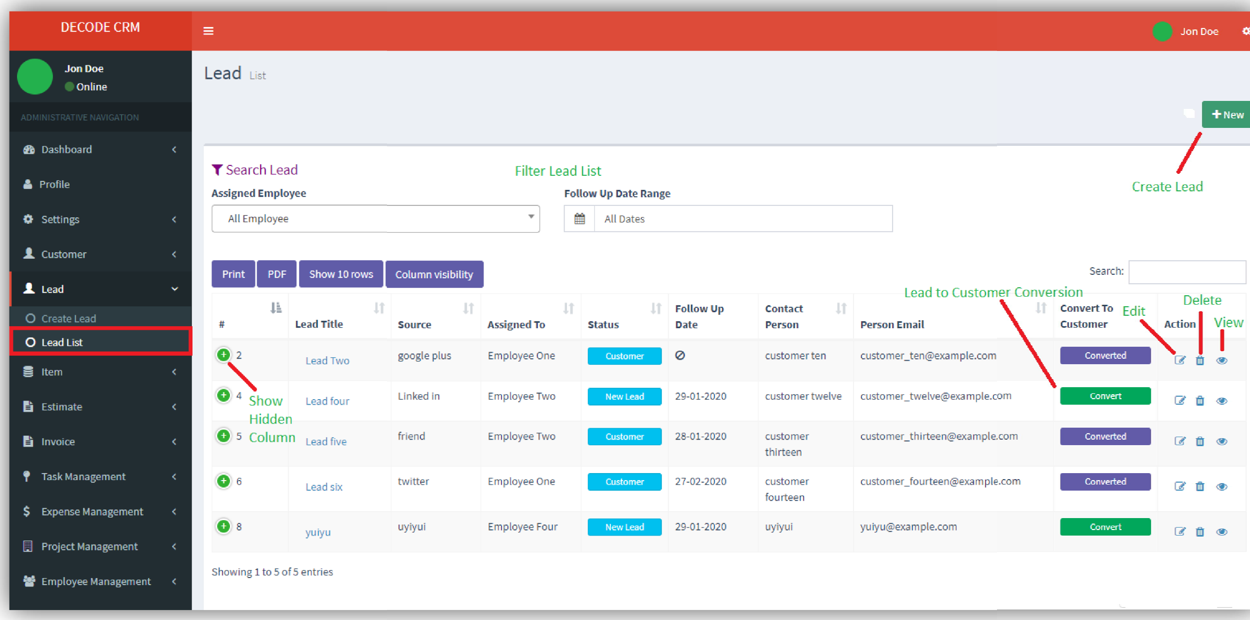


Fig 4.2 - Lead List

5. Item

User can mange (create, edit, delete) product or service from this module. Item module has four sections.

- Create Product
- Product List
- Create Service
- Service List

5.1 Create Product

- User can create product by clicking “Create Product” button inside “Item” menu.
- After clicking “Create Product” button user will see a product creation form. User has to fill all the mandatory fields (marked by *).
- While creating product, user has to select product status. User will get product status managing page by clicking “Product Status” button inside “Settings” page.
- While creating product user also has to select “Unit of Measurement”. User will get unit of measurement managing page by clicking “Unit of Measurement” button inside “Settings” page.

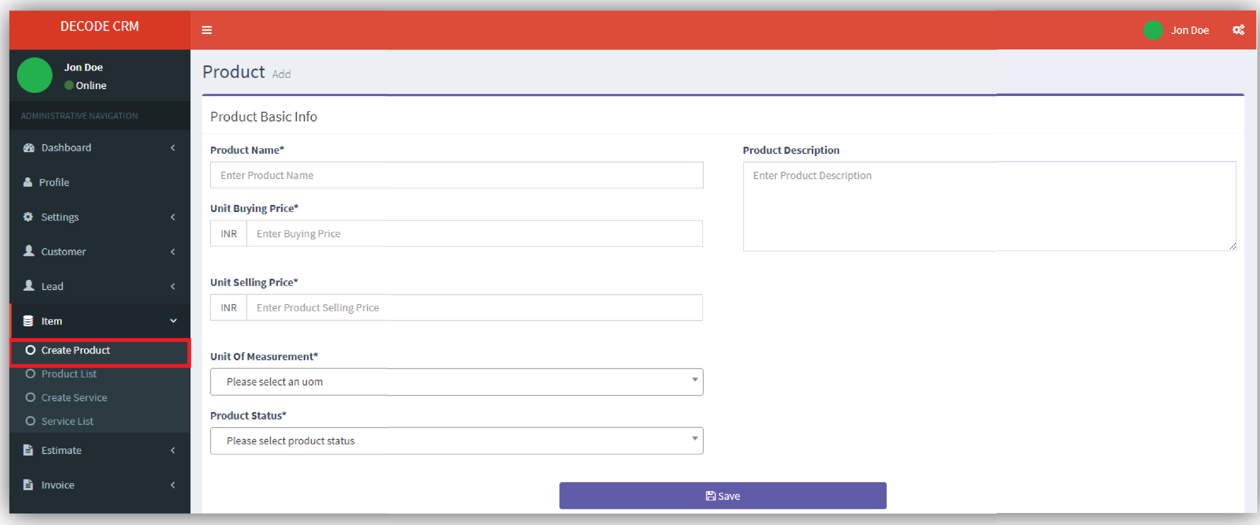


Fig 5.1 - Create Product

5.2 Product List

- User can see the product list after clicking “Product List” button inside “Item” menu.
- User can filter product list by “Product Name” & “Product Status”.
- User can hide/show particular column from the table by clicking “Column Visibility” button and then selecting a column, he wants to show/hide.
- User can see the hidden column by clicking “Plus” icon of a particular row.
- User can control the number of rows per page in the table by clicking “Show * rows” and then selecting number of row.
- User can print or make pdf of the current page of the table by clicking “Print” or “PDF” button.
- User can edit, delete product by clicking “Edit”, “Delete” icon from action column of a particular row.
- Editing product is as same as creating product.
- In order to delete a product user just has to confirm that he wants to delete all the details of that product permanently.
- User can not delete a product which is used by any invoice/estimate.

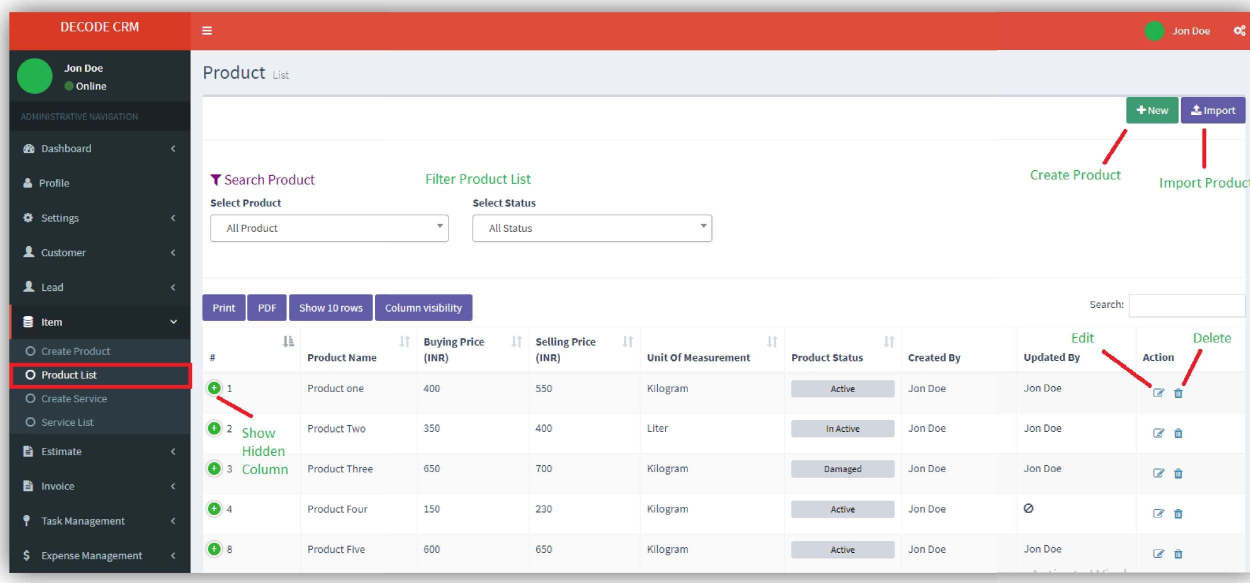


Fig 5.2 - Product List

5.3 Import Products

- User can import products by clicking “Import” button inside “Product List Page” and then following the rules provided in the modal box.
- In order to import products user has to download the example excel file from modal box and edit the file with product’s information.
- While preparing excel file user has to fill up red colored columns.
- User will get the required “product status id” and “unit of measurement id” by clicking “Product Status” & “Unit of Measurement” button inside “Settings” page. User can create product status & unit of measurement from there.

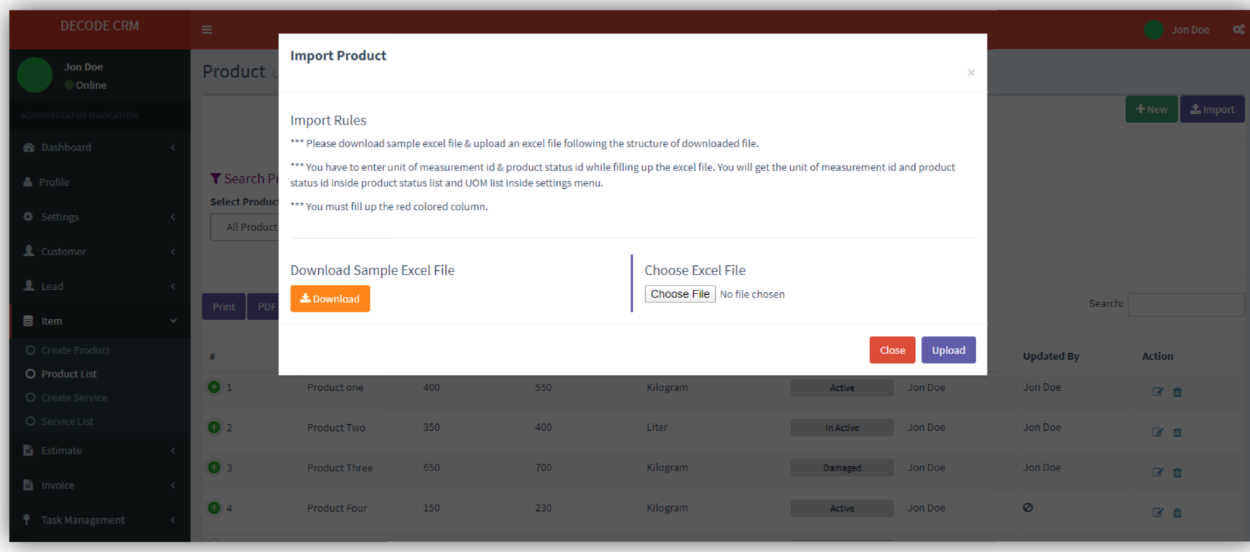


Fig 5.3 - Import Product

5.4 Create Service

- User can create service by clicking “Create Service” button inside “Item” menu.
- After clicking “Create Service” button user will see a service creating form. User has to fill all the mandatory fields (marked by *).

- While creating service user has to select "Unit of Measurement". User will get unit of measurement managing page by clicking "Unit of Measurement" button inside "Settings" page.

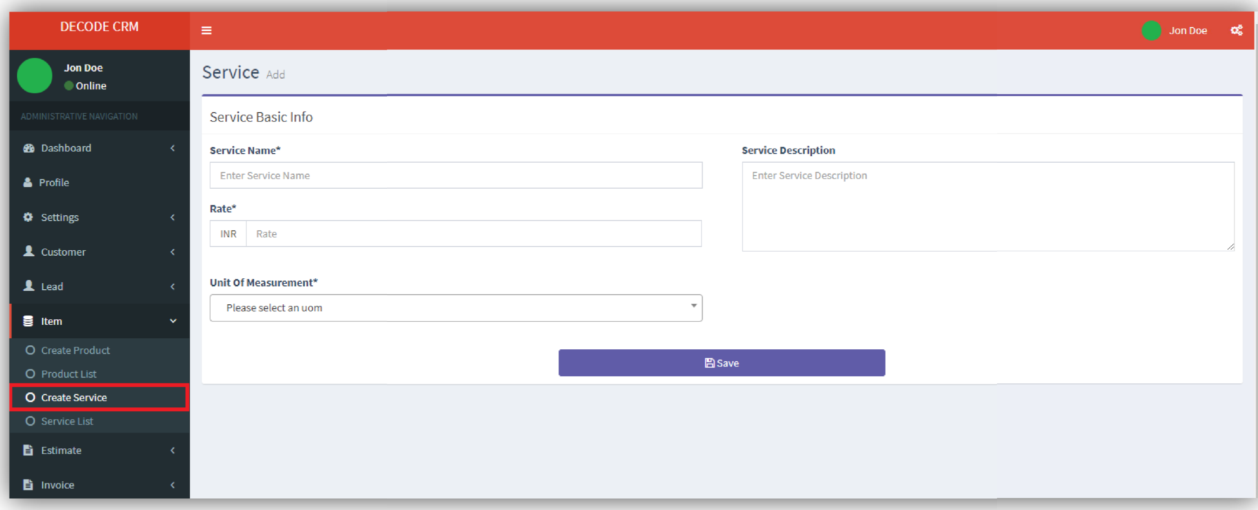


Fig 5.4 - Create Service

5.5 Service List

- User can see the service list by clicking "Service List" button inside "Item" menu.
- User can filter service by "Service Name".
- User can hide/show particular column from the table by clicking "Column Visibility" button and then selecting a column, he wants to show/hide.
- User can see the hidden column by clicking "Plus" icon of a particular row.
- User can control the number of rows per page in the table by clicking "Show * rows" and then selecting number of row.
- User can print or make pdf of the current page of the table by clicking "Print" or "PDF" button.
- User can edit, delete service by clicking "Edit", "Delete" icon from action column of a particular row.

- Editing service is as same as creating service.
- In order to delete a service user just has to confirm that he wants to delete all the details of that service permanently.
- User can not delete a service which is used by any invoice/estimate

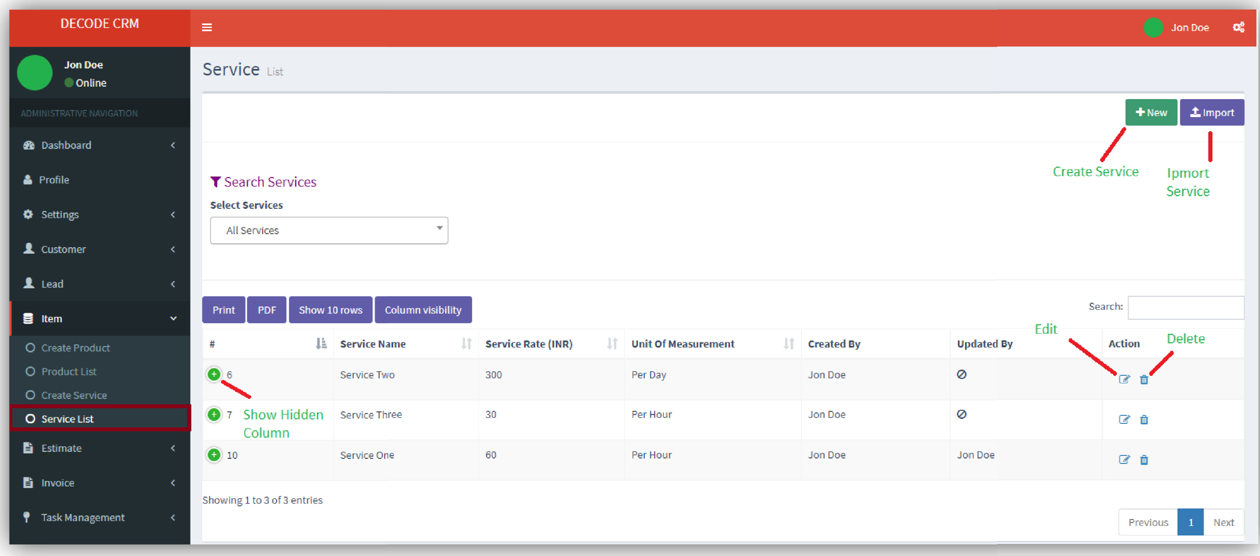


Fig 5.5 - Service List

5.6 Import Services

- User can import services by clicking “Import” button inside “Service List Page” and then following the rules provided in the modal box.
- In order to import services user has to download the example excel file from modal box and edit the file with service information.
- While preparing excel file user has to fill up red colored columns.
- User will get the required unit of measurement id by clicking “Unit of Measurement” button inside “Settings” page. User can also create “Unit of measurement” from there.

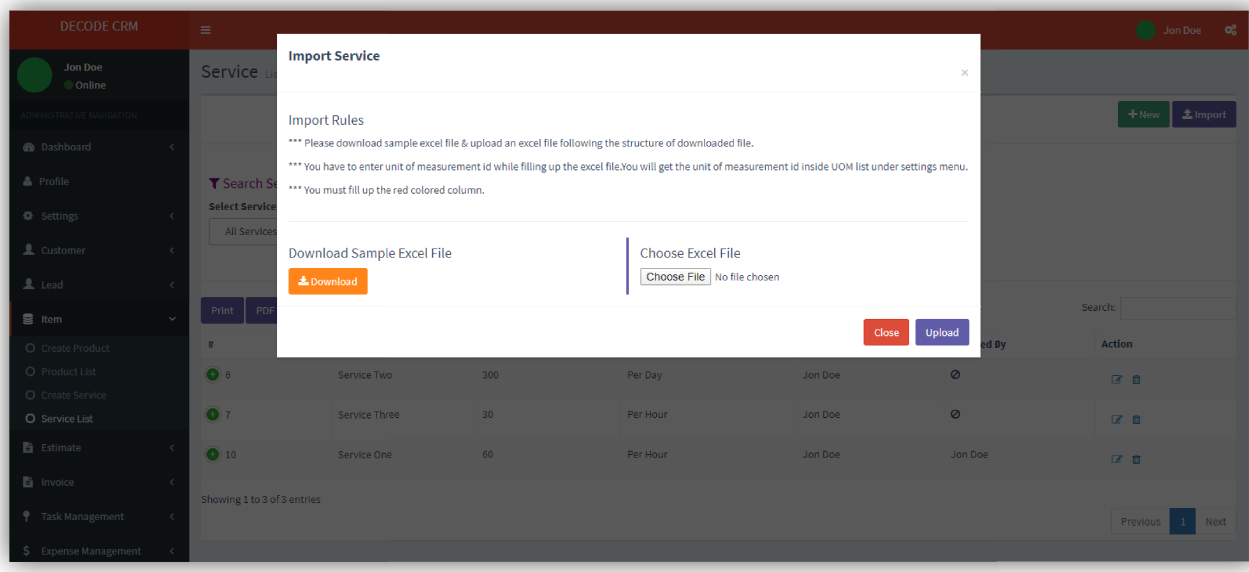


Fig 5.6 - Import Service

6. Estimate

User can manage (create, edit, delete) and see details of estimate from this module. This module has two sections.

- ➢ Create Estimate
- ➢ Estimate List

6.1. Create Estimate

- User can create estimate by clicking “Create Estimate” button inside “Estimate” menu.
- After clicking “Create Estimate” button, user will see estimate creation form. User has to fill all the mandatory fields (marked by *).
- While creating estimate user has to add items by selecting product/service from item selection box and then clicking “Add Item” button.
- User can add each item’s description, quantity, rate, unit of measurement (UOM), discount and tax while creating estimate.

- User can create unit of measurement and tax type. User will get unit of measurement and tax type managing page by clicking “Unit of Measurement” and “Tax Type” button inside “Settings” page.

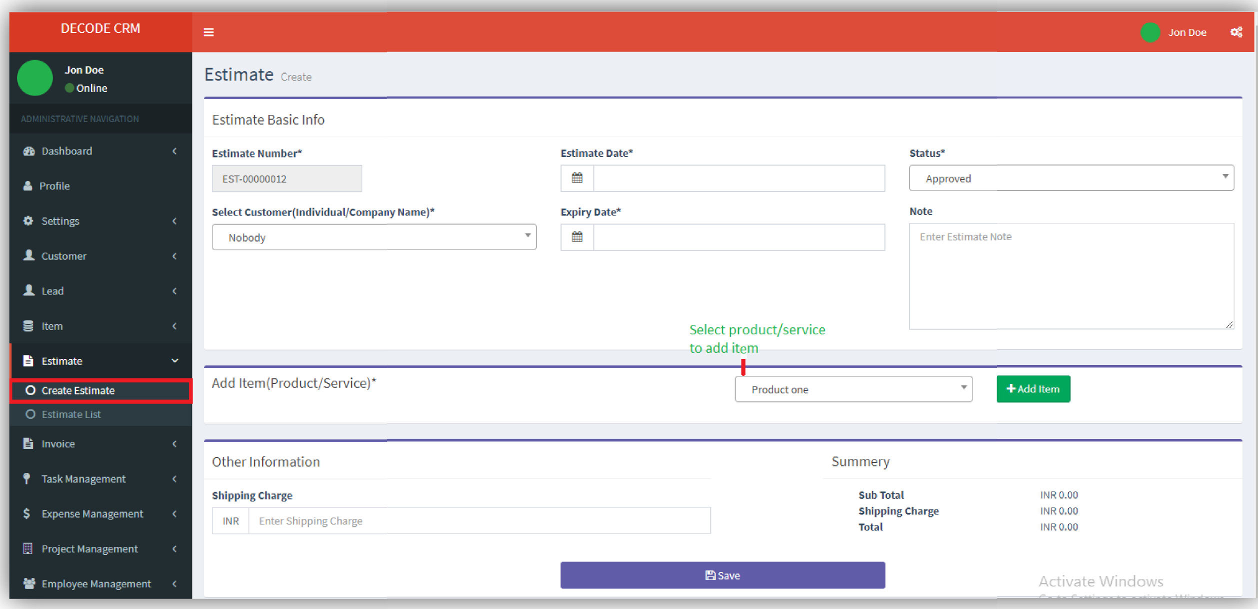


Fig 6.1 - Create Estimate

6.2 Estimate List

- User can see the estimate list by clicking “Estimate List” button inside “Estimate” menu.
- User can see the short summery of all estimates in the information boxes above estimate list page.
- User can filter estimate by “Customer”, “Estimate Status”, “Estimate Date” & “Expiry Date”.
- Pink colored rows indicate expired estimate.
- User can hide/show particular column from the table by clicking “Column Visibility” button and then selecting a column, he wants to show/hide.
- User can see the hidden column by clicking “Plus” icon of a particular row.
- User can control the number of rows per page in the table by clicking “Show * rows” and then selecting number of row.

- User can print or make pdf of the current page of the table by clicking “Print” or “PDF” button.
- User can edit, delete and see details of estimate by clicking “Edit”, “Delete” and “View” icon from action column of a particular row.
- Editing estimate is as same as creating estimate.
- In order to delete an estimate user just has to confirm that he wants to delete all the details of that estimate permanently.
- User can not edit an estimate which is already invoiced.

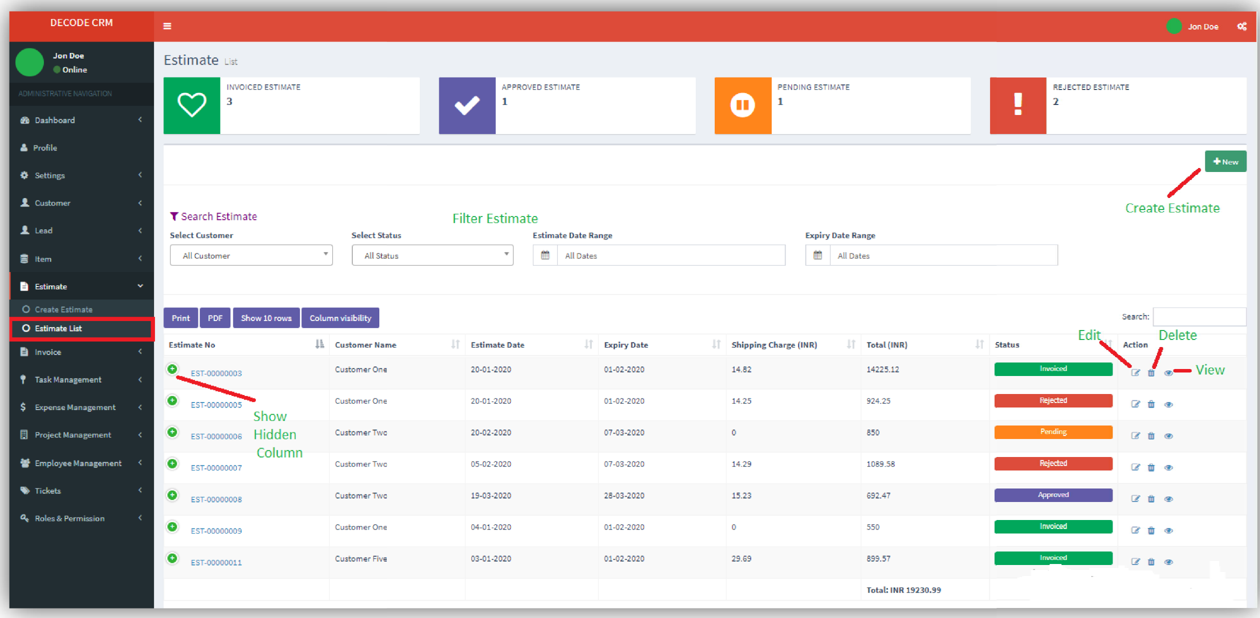


Fig 6.2 - Estimate List

6.3 Estimate Details

- In order to see the details of an estimate user has to click on particular “Estimate No” or “View” icon from “Action” column of particular row.
- User can print, download, email estimate details by clicking “Print”, “Download”, and “Email” button.
- User can convert an “Approved Estimate” into invoice by clicking “Make It Invoiced” button.

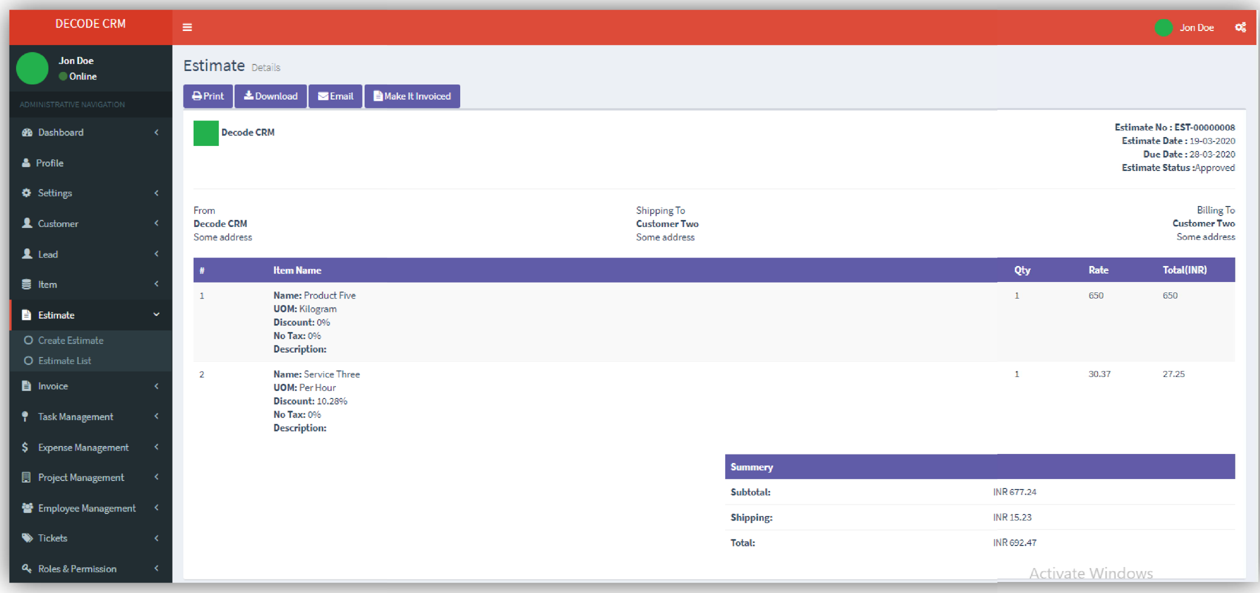


Fig 6.3 - Estimate Details

7. Invoice

User can manage (create, edit, delete) & see details of invoice from invoice module. User can create, delete and see details of each payment of an invoice from invoice details. Invoice module has 2 sections.

- ➢ Create Invoice
- ➢ Invoice List

7.1 Create Invoice

- User can create invoice by clicking “Create Invoice” button inside “Invoice” menu.
- After clicking “Create Invoice” button, user will see invoice creation form. User has to fill all the mandatory fields (marked by *).
- While creating invoice user has to add items by selecting product/service from item selection box and then clicking “Add Item” button.

- User can add each item's description, quantity, rate, unit of measurement (UOM), discount and tax while creating invoice.
- User can create unit of measurement and tax type. User will get unit of measurement and tax type managing page by clicking "Unit of Measurement" and "Tax Type" button inside "Settings" page.

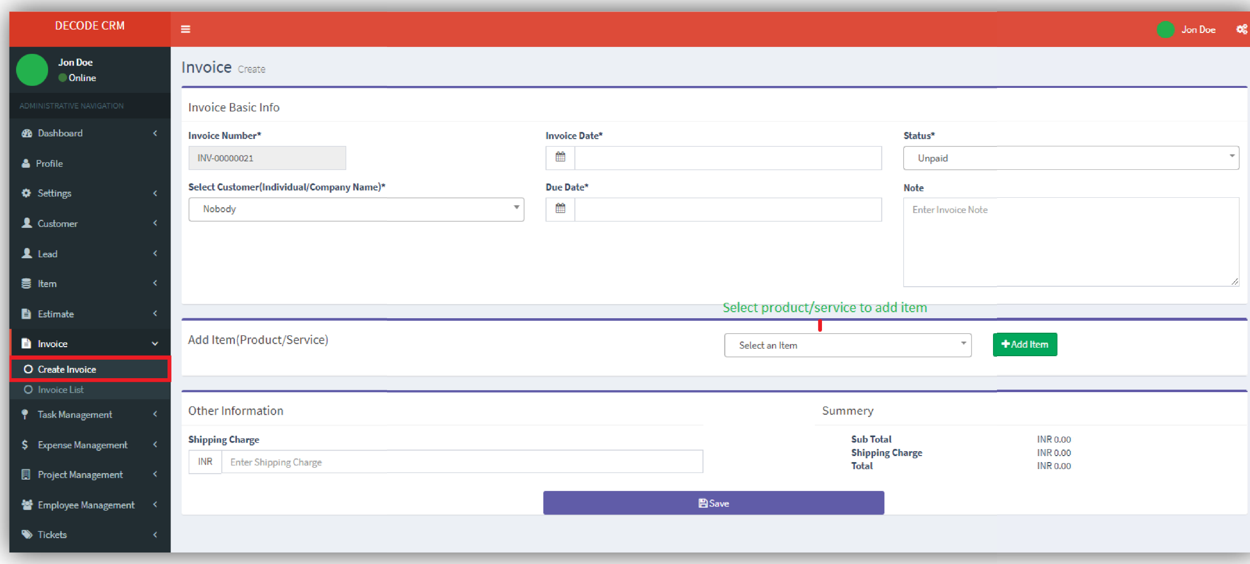


Fig 7.1 - Create Invoice

7.2 Invoice List

- User can see the invoice list by clicking "Invoice List" button inside "Invoice" menu.
- User can see the short summery of all invoices in the information box above invoice list page.
- User can filter invoice by "Customer", "Invoice Status", "Invoice Date" & "Due Date".
- Pink colored rows indicate due invoice.
- User can hide/show particular column from the table by clicking "Column Visibility" button and then selecting a column, he wants to show/hide.
- User can see the hidden column by clicking "Plus" icon of a particular row.

- User can control the number of rows per page in the table by clicking “Show * rows” and then selecting number of row.
- User can print or make pdf of the current page of the table by clicking “Print” or “PDF” button.
- User can edit, delete and see details of invoice by clicking “Edit”, “Delete” and “View” icon from action column of a particular row.
- Editing invoice is as same as creating invoice.
- In order to delete an invoice user just has to confirm that he wants to delete all the details of that invoice permanently.
- User can not edit/delete an invoice which is paid/partially paid

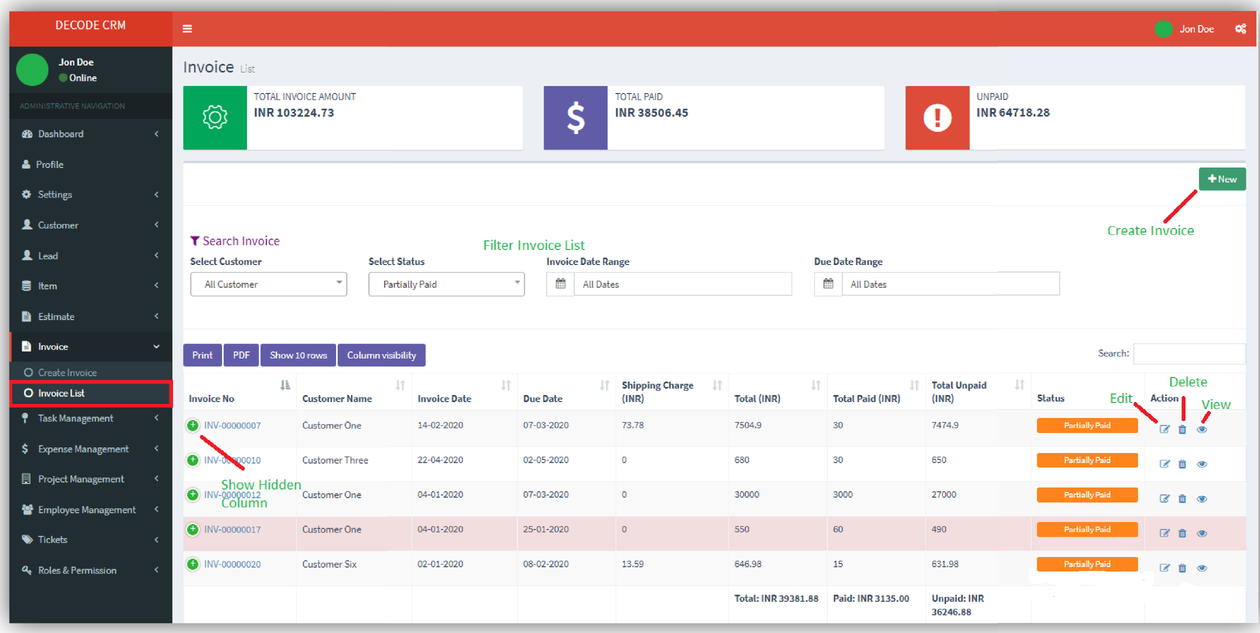


Fig 7.2 - Invoice List

7.3 Invoice Details

In order to see the details of an invoice user has to click on particular “Invoice No” or “View” icon from “Action” column of the table. Invoice details page has three sections.

- ➢ Invoice
- ➢ Payment &
- ➢ Payment List

7.3.1 Invoice

- User can see particular invoice details in this section.
- User can print, download and email invoice by clicking "Print", "Download", and "Email" button.

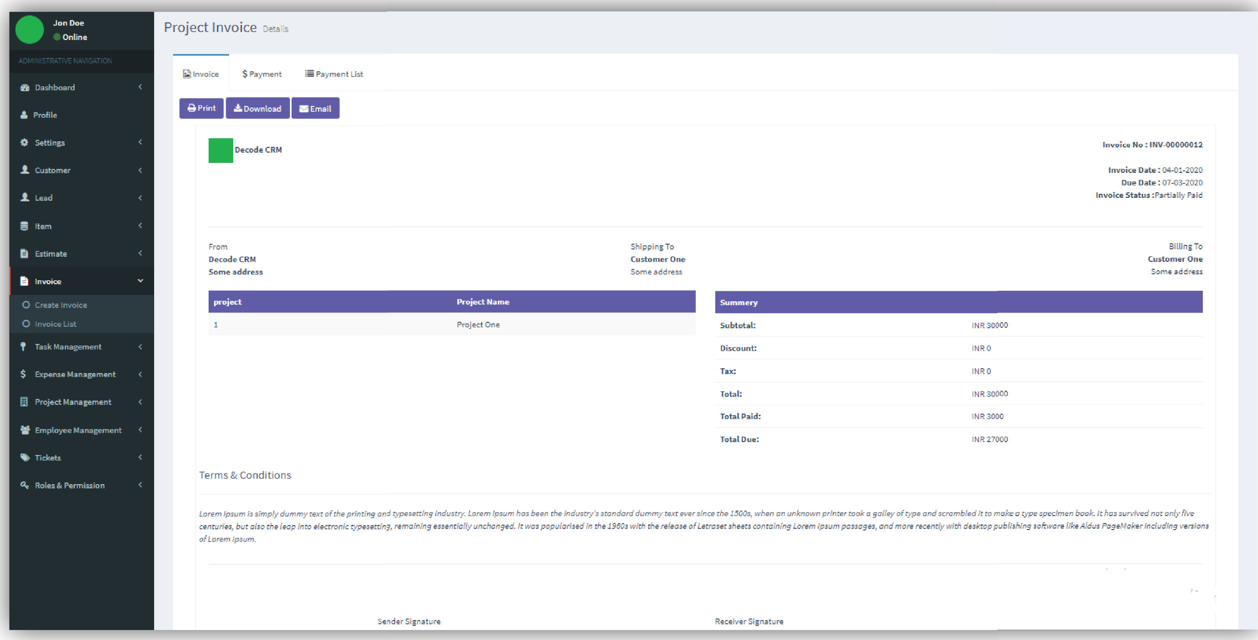


Fig 7.3 - Invoice Details

7.3.2 Payment

- User can see payment making form in this section
- User can complete half/full payment by filling up necessary details in payment form.
- User has to fill all the mandatory fields (marked by *) in payment creation form.

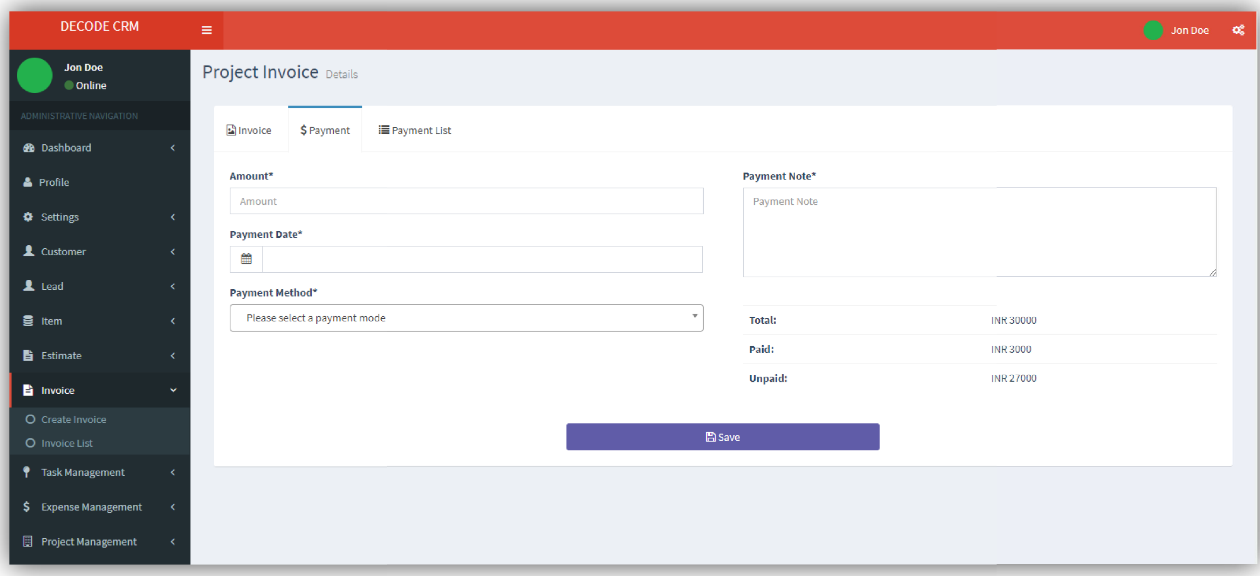


Fig 7.4 - Create Payment

7.3.3 Payment List

- User can see invoice wise payment list in this section.
- User can filter payment list by "Payment Method" & "Payment Date".
- User can hide/show particular column from the table by clicking "Column Visibility" button and then selecting a column, he wants to show/hide.
- User can see the hidden column by clicking "Plus" icon of a particular row.
- User can print or make pdf of the current page of the table by clicking "Print" or "PDF" button.
- User can delete and see details of a particular payment by clicking "Delete" and "View" icon from action column of particular row.

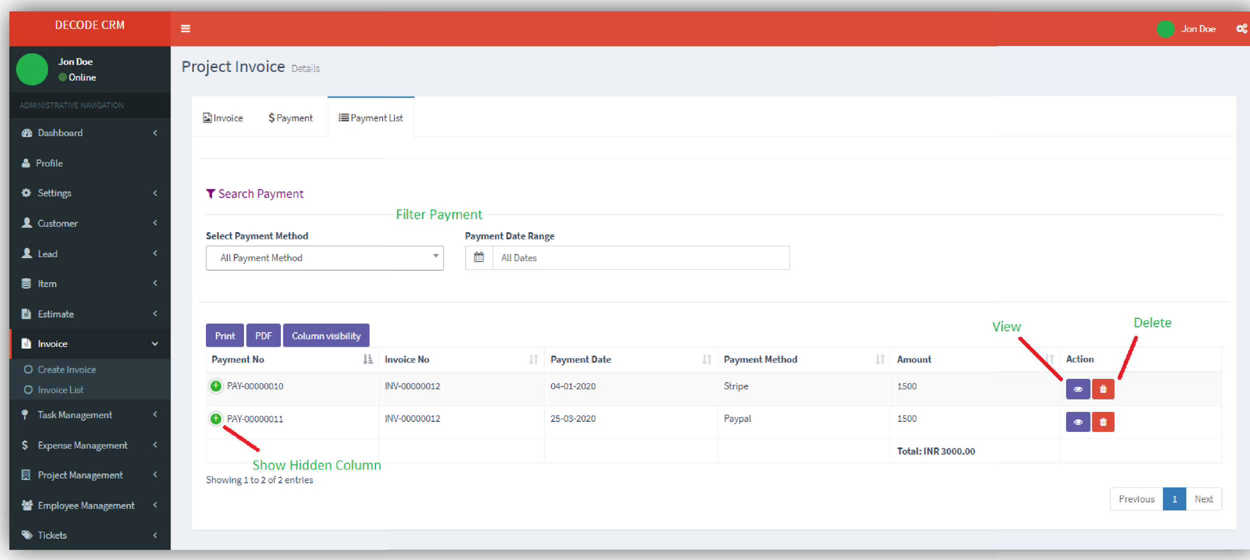


Fig 7.5 - Payment List

7.3.4 Payment Details

- In order to see the details of a particular payment, user has to click on “View” icon from action column of particular row.
- User can print/ download/ email payment details by clicking “Print”, “Download”, and “Email” button.

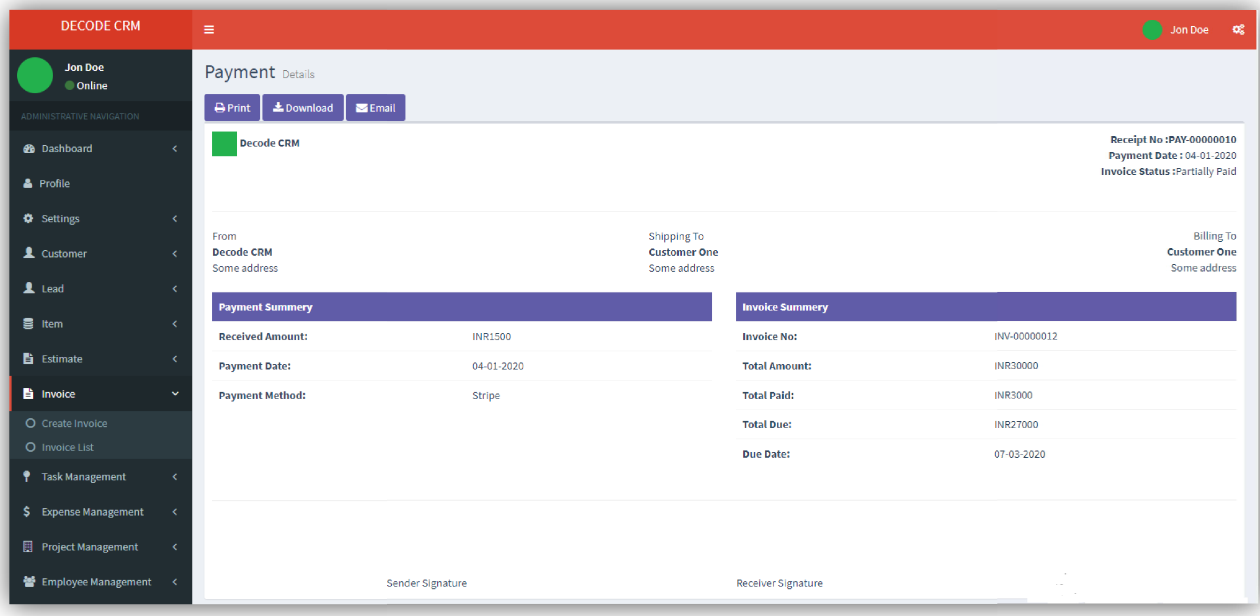


Fig 7.6 - Payment Details

8. Task Management

User can manage (Create, Edit and Delete) task and see task list from this module. In order to create, edit, delete & see the task list user has to click “Task List” button inside “Task Management” menu.

8.1Create Task

- User can create task by clicking “+New” button inside “Task list” page.
- After clicking “+New” button from task list page user will get task creation form.
- User has to fill all the mandatory fields (marked by *).
- While creating task user has to select task status. User can get task status creation page by clicking “Task Status” button inside “Settings page”.

- User can assign task to employee by selecting employee from the select box. Before selecting employee, user has to create employee from employee module

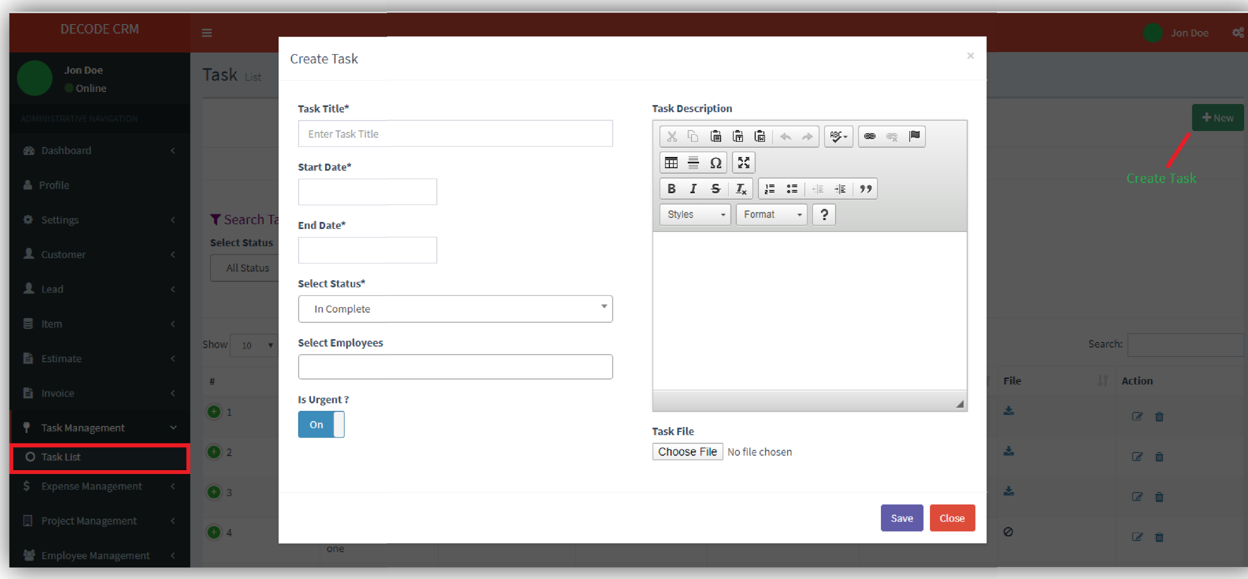


Fig 8.1 - Create Task

8.2 Task List

- Inside task listing page user will get the entire task list.
- User can filter task by "Task status", "Task starting date" & "Task ending date"
- Pink colored rows indicate that task ending date is over.
- User can edit & delete task by clicking "Edit" & "Delete" icon of a particular row.
- User can also download particular task file (if any) by clicking "Download" icon from "File" column of particular row.
- Editing task is as same as creating task.
- In order to delete a task, user just has to confirm that he wants to delete all the details of that task permanently.

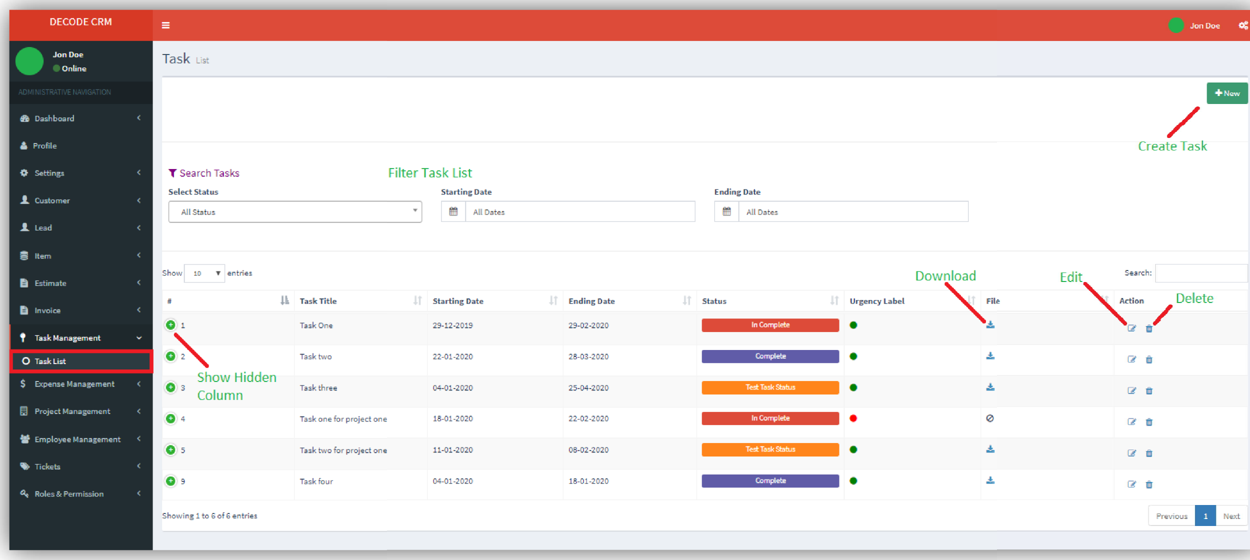


Fig 8.2 - Task List

9. Expense Management

User can manage (create, edit, delete) expense in this module. This module has 2 sections.

- ➢ Create Expense
- ➢ Expense List

9.1 Create Expense

- User can create expense by clicking “Create Expense” button inside “Expense Management” menu.
- After clicking “Create Expense” button user will get expense creation form.
- User has to fill all the mandatory fields (marked by *).
- While creating expense user has to select an expense type. User will get expense type managing page by clicking “Expense Type” button inside “Settings Page”.

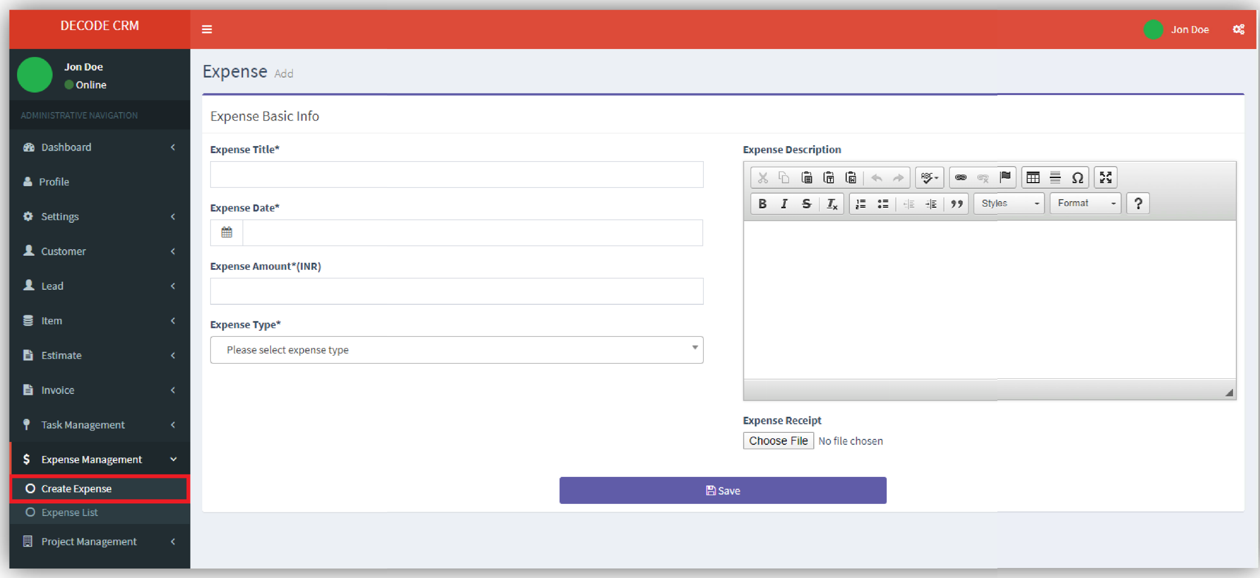


Fig 9.1 – Create Expense

9.2Expense List

- User can see the entire expense list by clicking “Expense List” button inside “Expense Management” menu.
- User can filter expense list by “Expense Type” & “Expense Date”.
- User can hide/show particular column from the table by clicking “Column Visibility” button and then selecting a column, he wants to show/hide.
- User can see the hidden column by clicking “Plus” icon of a particular row.
- User can control the number of rows per page in the table by clicking “Show * rows” and then selecting number of row.
- User can print or make pdf of the current page of the table by clicking “Print” or “PDF” button.
- User can edit, delete expense by clicking “Edit”, “Delete” icon from action column of a particular row.
- User can also download expense receipt (if any) by clicking “Download” icon of “Receipt” column.
- Editing expense is as same as creating expense.

- In order to delete an expense, user just has to confirm that he wants to delete all the details of that expense permanently.

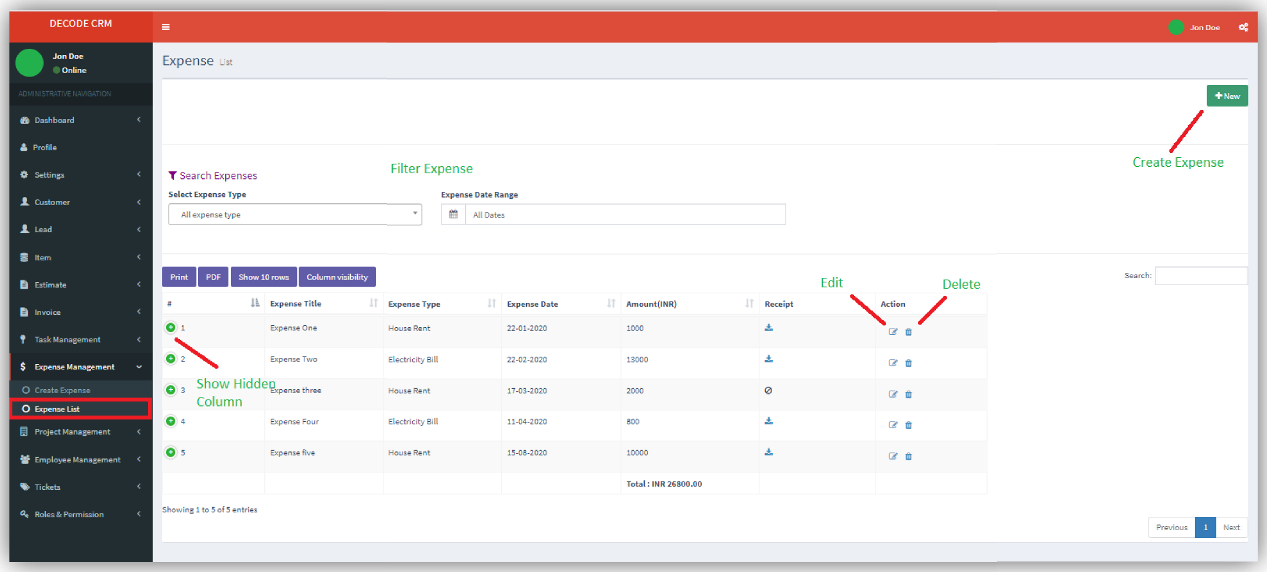


Fig 9.2 - Expense List

10. Project Management

User can manage (create, edit, delete) and see details of a project from this module. User can manage (create, edit, delete) project features, project tasks, project bugs, project related files and can see the list of project payment details from here. User can also manage (create, edit, delete and see details) of project invoice from this module. This module has 2 main sections.

- Create Project
- Project List

10.1 Create Project

- User can create project by clicking “Create Project” button under “Project Management” menu.

* After clicking “Create Project” button user will see a project creation form. User has to fill all the mandatory fields (marked by *).

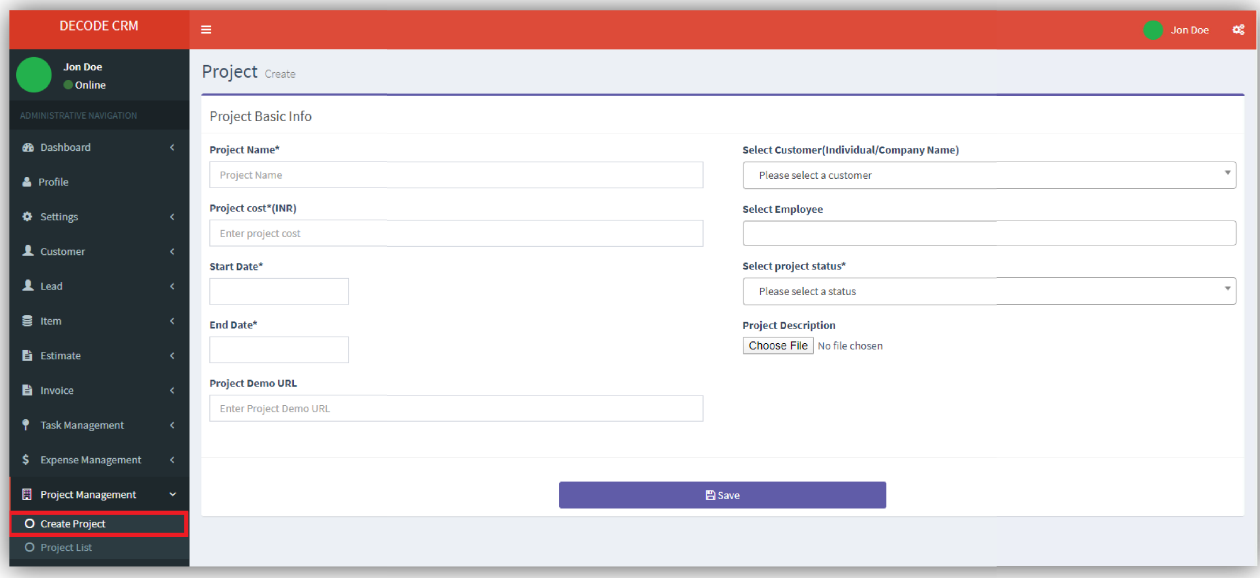


Fig 10.1 - Create Project

10.2 Project List

* User can see the entire project list by clicking “Project List” button inside “Project Management” menu.
* User can filter project list by “Customer Name”, “Project Status”, “Project Start Date” & “Project End Date”.
* User can hide particular column from the table by clicking “Column Visibility” button and then selecting a column, he wants to show/hide.
* User can see the hidden column by clicking “Plus” icon of a particular row.
* User can control the number of rows per page in the table by clicking “Show * rows” and then selecting number of row.
* User can print or make pdf of the current page of the table by clicking “Print” or “PDF” button.

- User can edit, delete, and see details of a project by clicking "Edit", "Delete", and "View" icon of a particular row's action column.
- User can also download project description file (if any) by clicking "Download" icon of "Project Description" column.
- Editing project is as same as creating project.
- In order to delete a project user just has to confirm that he wants to delete all the details of that project permanently.
- User can not delete a project which has invoice.

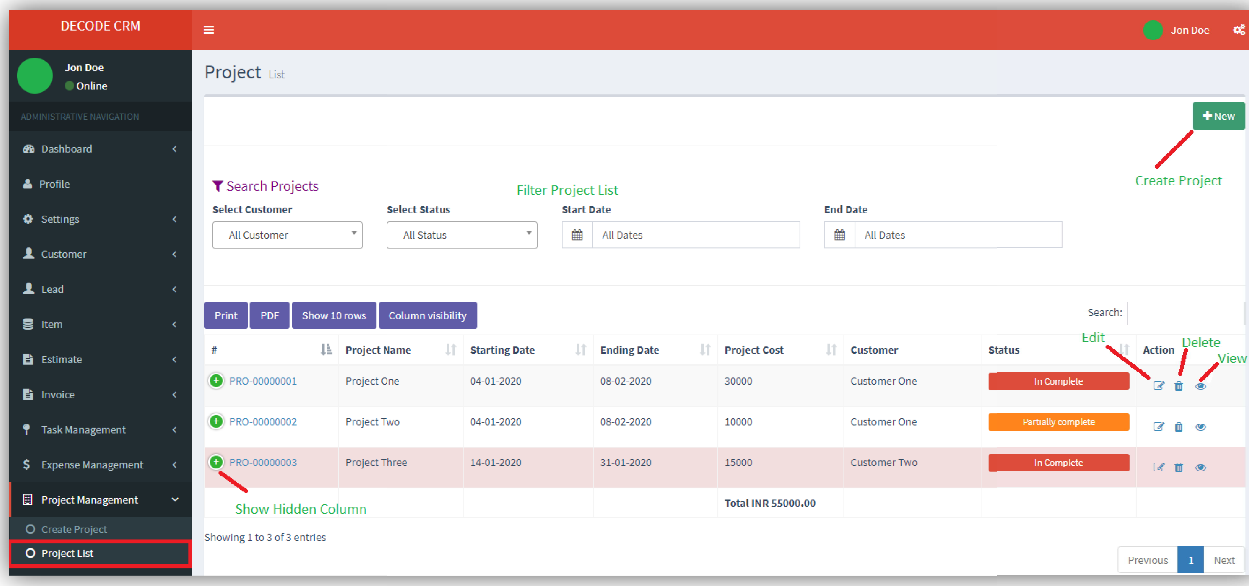


Fig 10.2 - Project List

10.3 Project Details

In order to see project details user has to click "View" icon from action column of particular row. Project details page has eight sub sections

- ➢ Project General Details
- ➢ Project Features
- ➢ Project Tasks
- ➢ Report Bugs
- ➢ Project Files
- ➢ Create Project Invoice To Sell

- ➢ Project Invoices
- ➢ Project Payment

10.3.1 General

- User can get project basic information from this section.
- User can download project description by clicking "Download" icon.
- User can get the list of employee working on this project.
- User can get information about project progress (total completed tasks & total fixed bugs) from here.

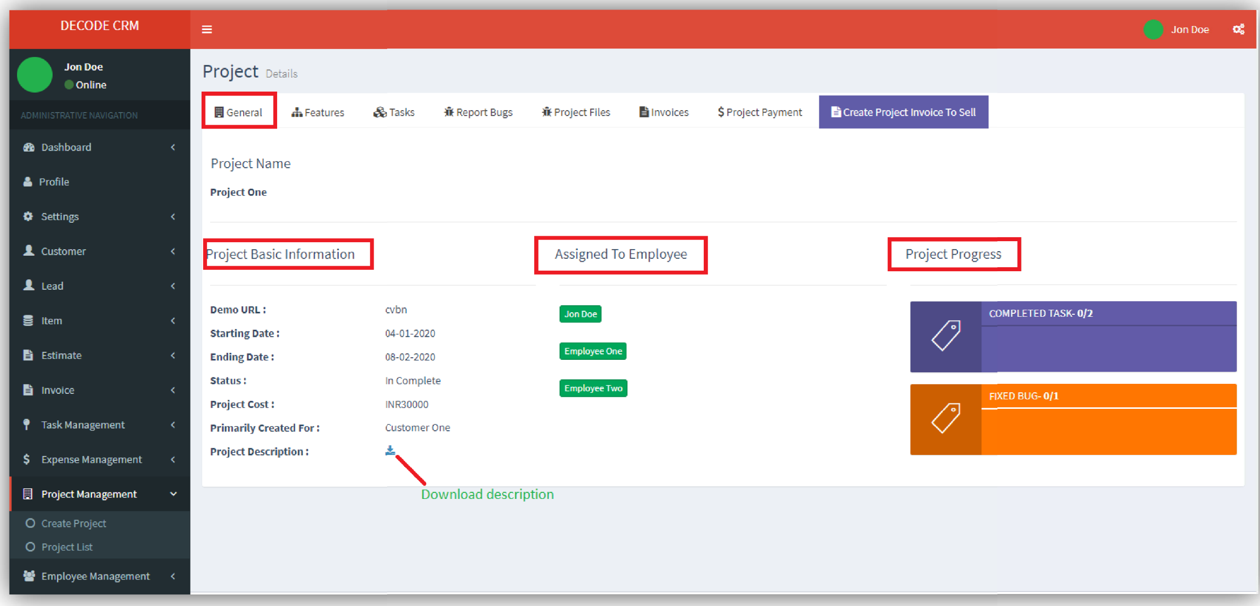


Fig 10.3 - Project General Details

10.3.2 Features

- User can manage(create, edit, delete) features & see feature list in this section
- User can create feature by clicking "+New" button in top right corner of this section
- After clicking "+New" button, a modal box (contains feature creation form) will open.
- User has to fill all the necessary field (marked by *)

- User can see hidden details by clicking “plus” icon of particular row.
- User can edit the feature by clicking “Edit icon” of particular row’s action column.
- Editing a feature is as same as creating a feature.
- User can download feature file by clicking “Download” icon of particular row’s “File” column.
- User can delete feature by clicking “Delete” icon of particular row’s action column.
- In order to delete a feature user just has to confirm that he wants to delete all the details of that feature permanently.

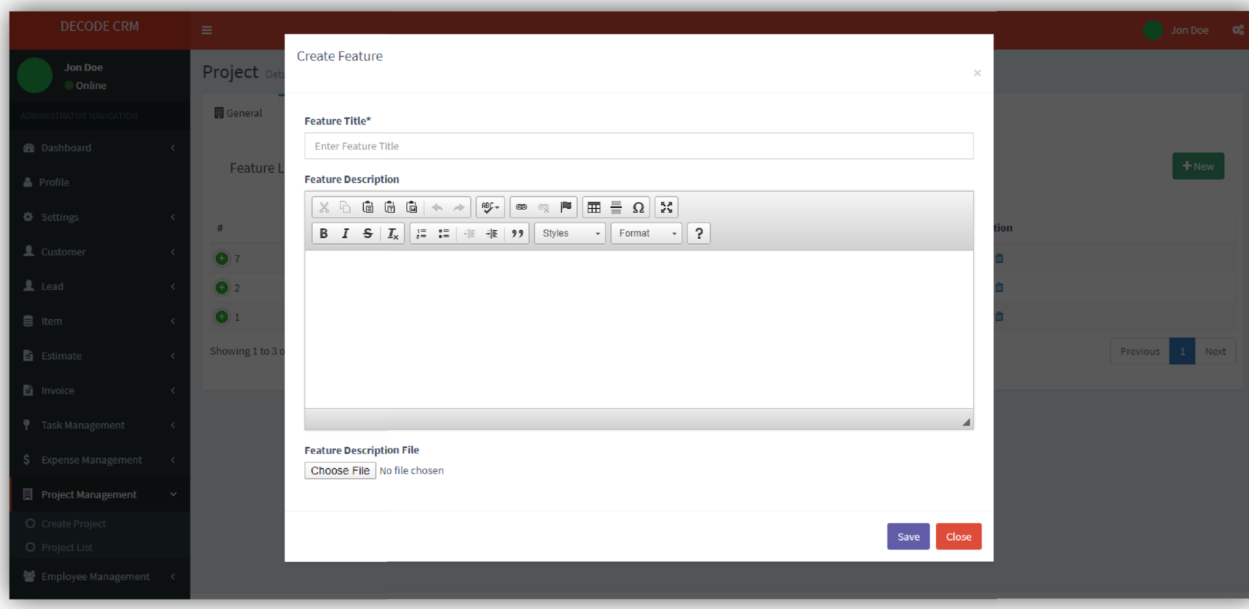


Fig 10.4 - Create Project Feature

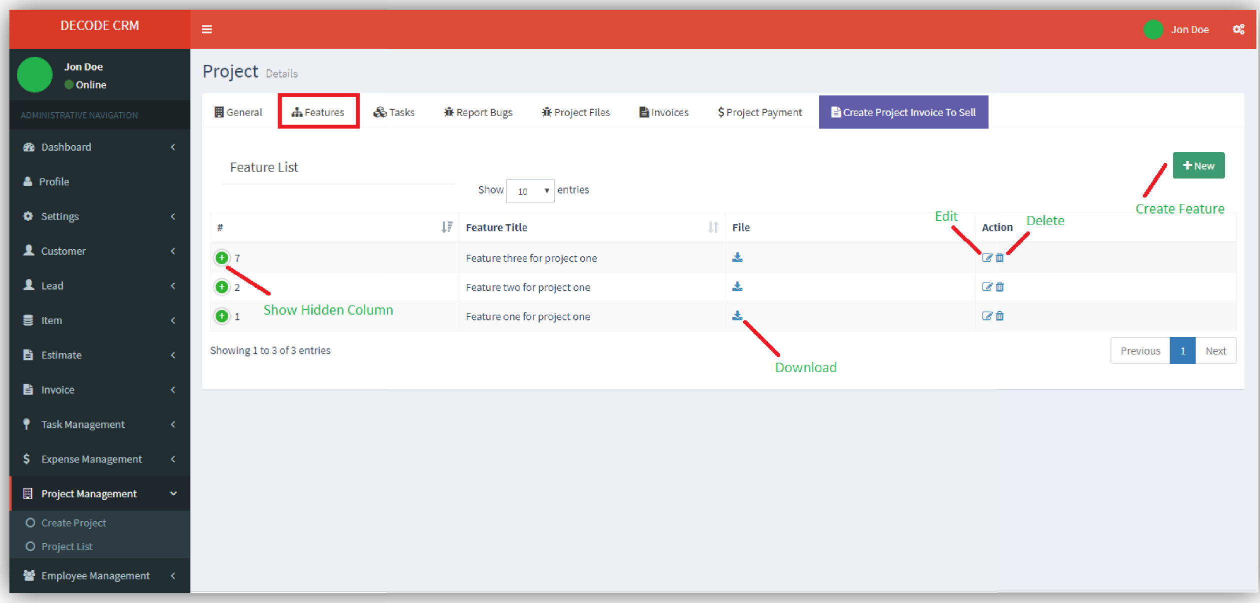


Fig 10.5 - Project Feature List

10.3.3 Project Tasks

- User can manage(create, edit, delete) project's tasks & see project task list in this section
- User can create task by clicking "+New" button in top right corner of this section
- After clicking "+New" button, a modal box (contains task creation form) will open.
- User has to fill all the necessary field (marked by *).More information about task is given in the documentation of "Task Management"
- User can see hidden details by clicking "plus" icon of particular row
- User can edit the task by clicking "Edit" icon of particular row's action column.
- Editing a task is as same as creating a task.
- User can download task file by clicking "Download" icon of particular row's "File" column.
- User can delete task by clicking "Delete icon" from the row of particular task's action column.

- In order to delete a task user just has to confirm that he wants to delete all the details of that task permanently.
- While creating/editing project task user can only assign that task to the employees of that project

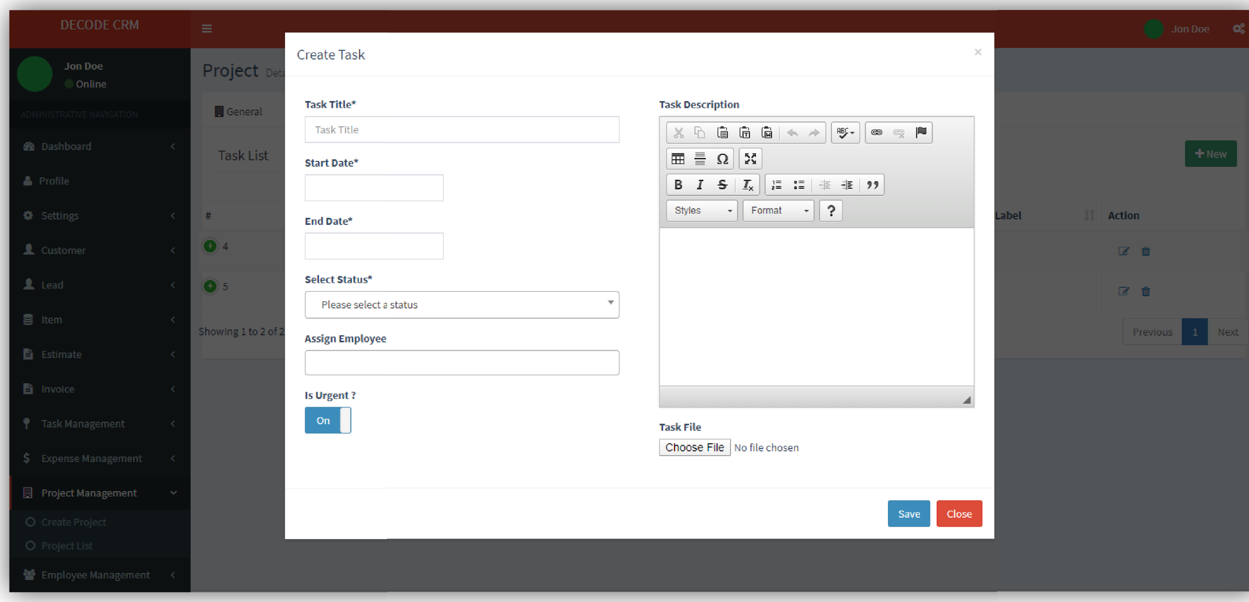


Fig 10.6 - Create Project Task

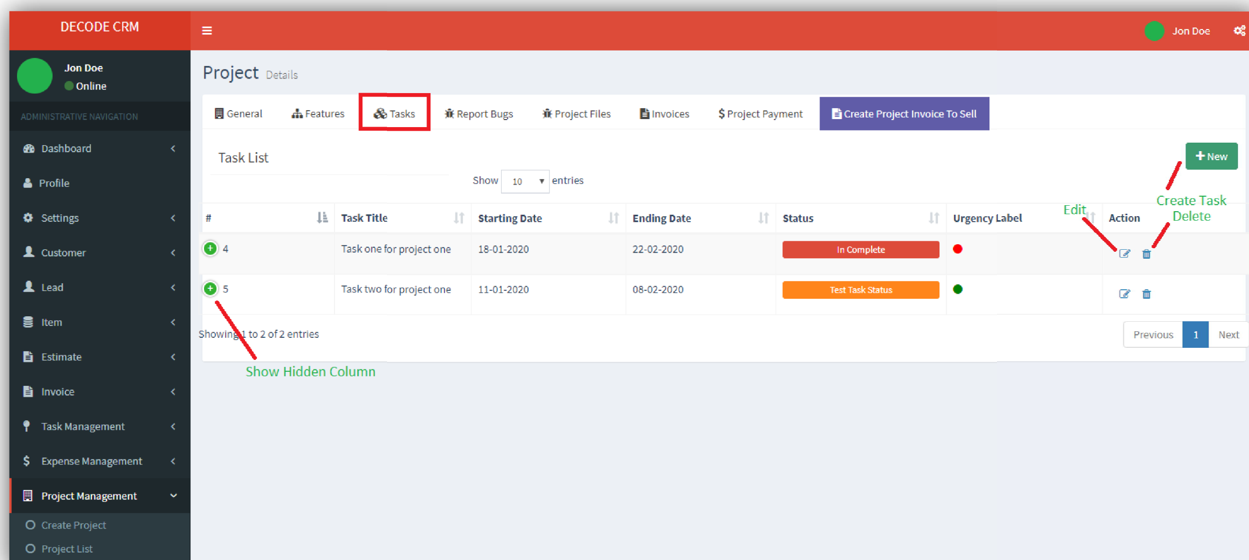


Fig 10.7 - Project Task List

10.3.4 Report Bugs

- User can report bugs in this section
- User can report bug by clicking "+New" button in top right corner of this section
- After clicking "+New" button, a modal box (contains bug reporting form) will open.
- User has to fill all the necessary field (marked by *)
- While reporting bug user has to select bug status. User will get bug status managing page by clicking "Bug Status" button inside "Settings Page".
- User can edit the reported bug by clicking "Edit icon" from the row of particular bug's action column.
- User can see hidden details by clicking "plus" icon of particular row
- Editing a reported bug is as same as reporting a bug.
- While reporting/editing bug user can only assign that bug to solve to the employees of that project
- User can download bug description file by clicking "Download icon" from the row of particular bug's "File" column.
- User can delete reported bug by clicking "Delete icon" from the row of particular bug's action column
- In order to delete a bug user just has to confirm that he wants to delete all the details of reported bug permanently.

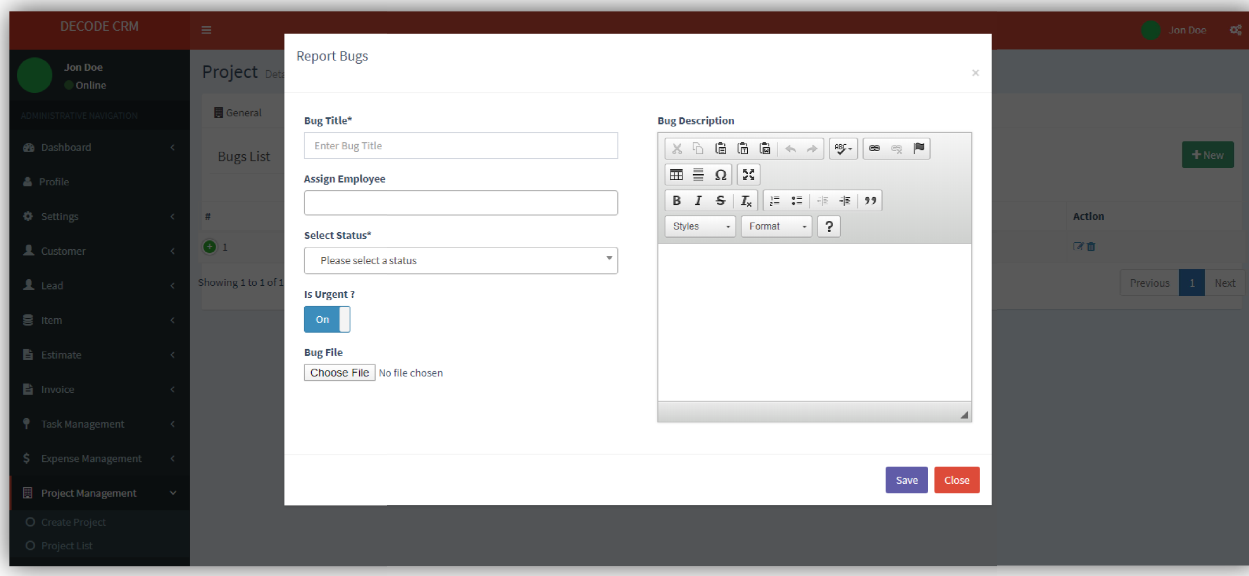


Fig 10.8 - Report Bug

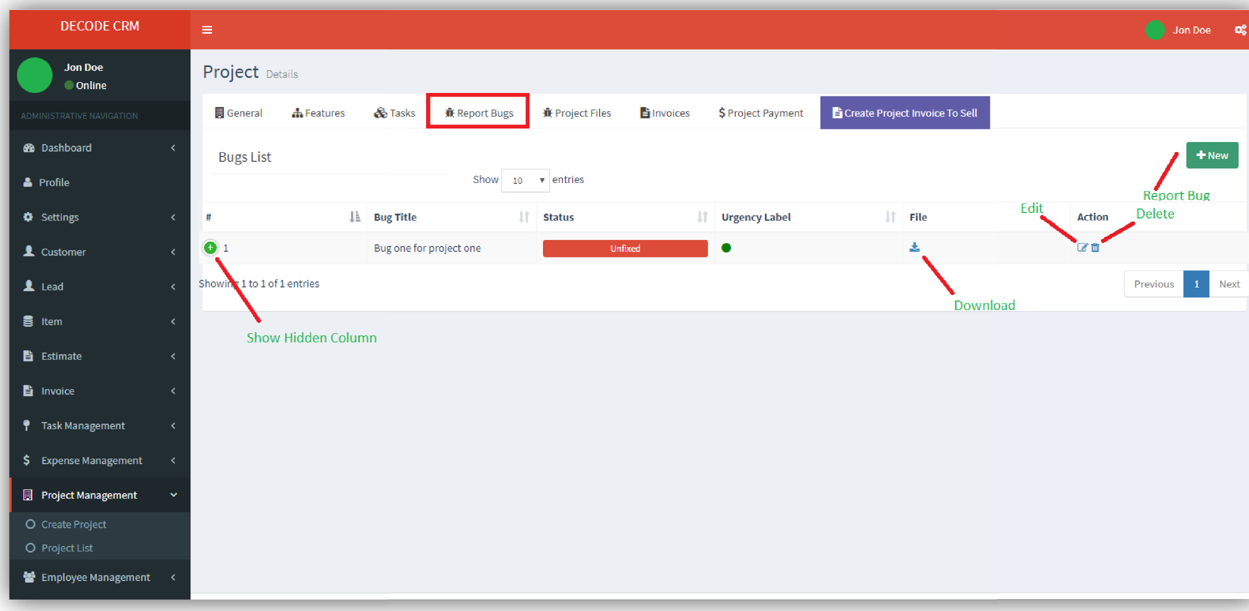


Fig 10.9 - Project Bug List

10.3.5 Project Files

- User can manage (create, edit, delete, share with customer) project related files in this section.
- User can create project file by clicking "+New" button in top right corner of this section
- After clicking "+New" button, a modal box (contains project file creation form) will open.
- User has to fill all the necessary field (marked by *)
- User can see hidden details by clicking "plus" icon of particular row
- User can edit the project file by clicking "Edit icon" from the row of particular project file's action column.
- Editing a project file is as same as creating a project file.
- User can download project file by clicking "Download icon" of particular row's "File" column.
- User can delete project file by clicking "Delete icon" of particular row's action column.
- In order to delete particular project file, user just has to confirm that he wants to delete all details of that project file permanently

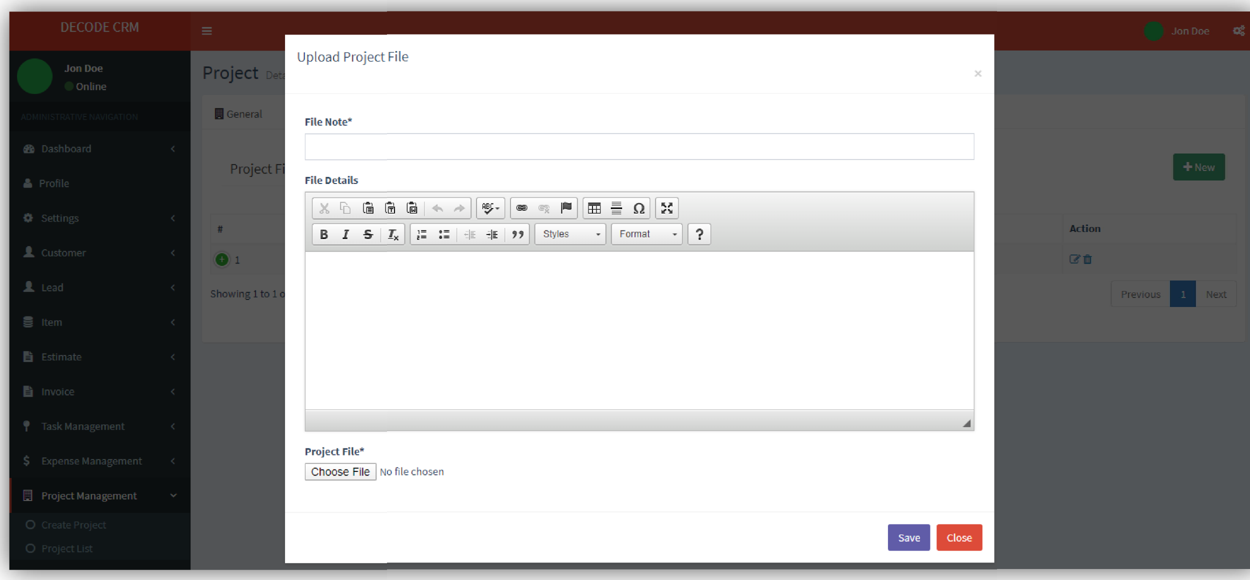


Fig 10.10 - Create Project File

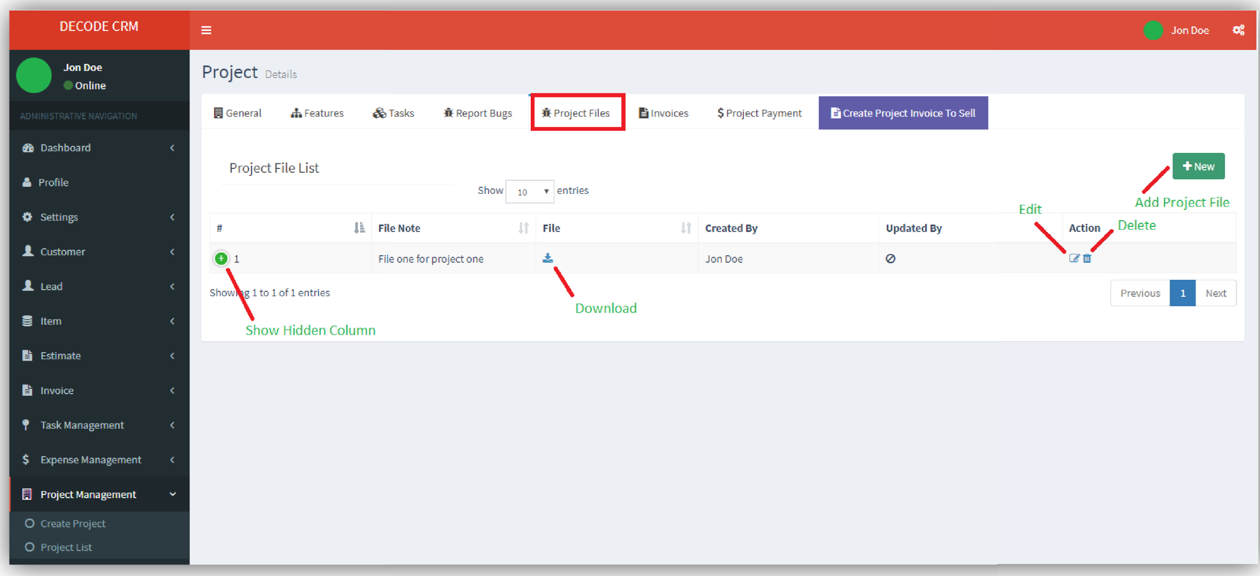


Fig 10.11 - Project File List

10.3.6 Create Project Invoice to Sell

- In order to create project invoice user has to click “Create Project Invoice to Sell” button in project details page.
- After clicking “Create Project Invoice to Sell” button user will get project invoice creation form.
- User has to fill the necessary field (marked by *).

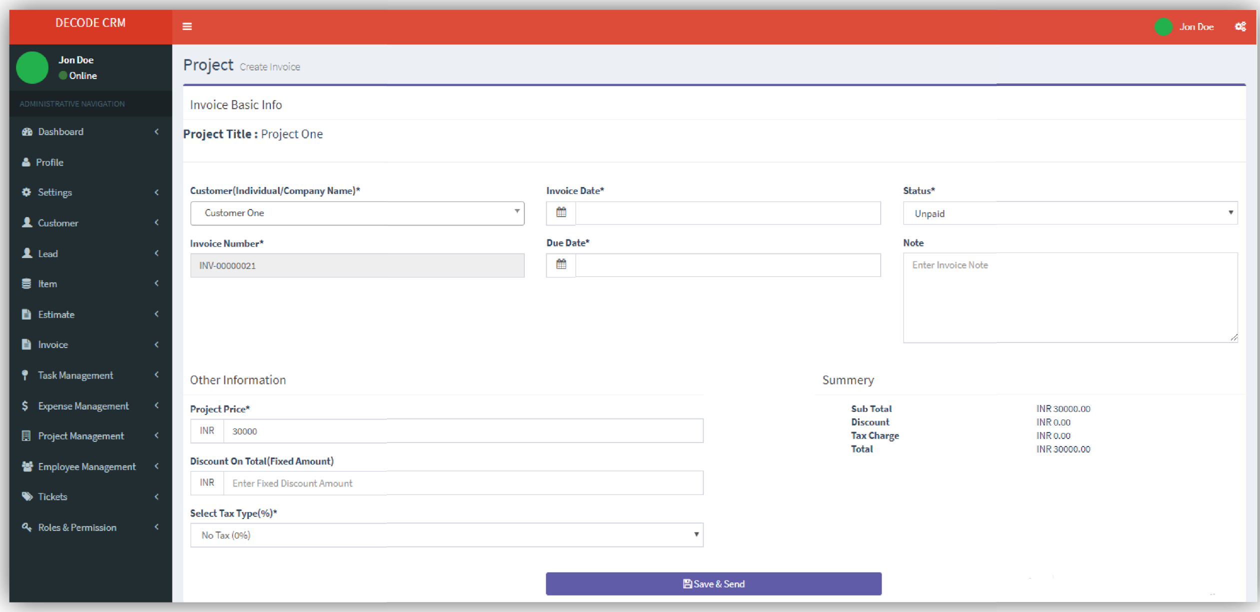


Fig 10.12 - Create Project Invoice

10.3.7 Project Invoices

User will see all invoice list of this project in this section. The detail documentation about invoice is given in **section 5**

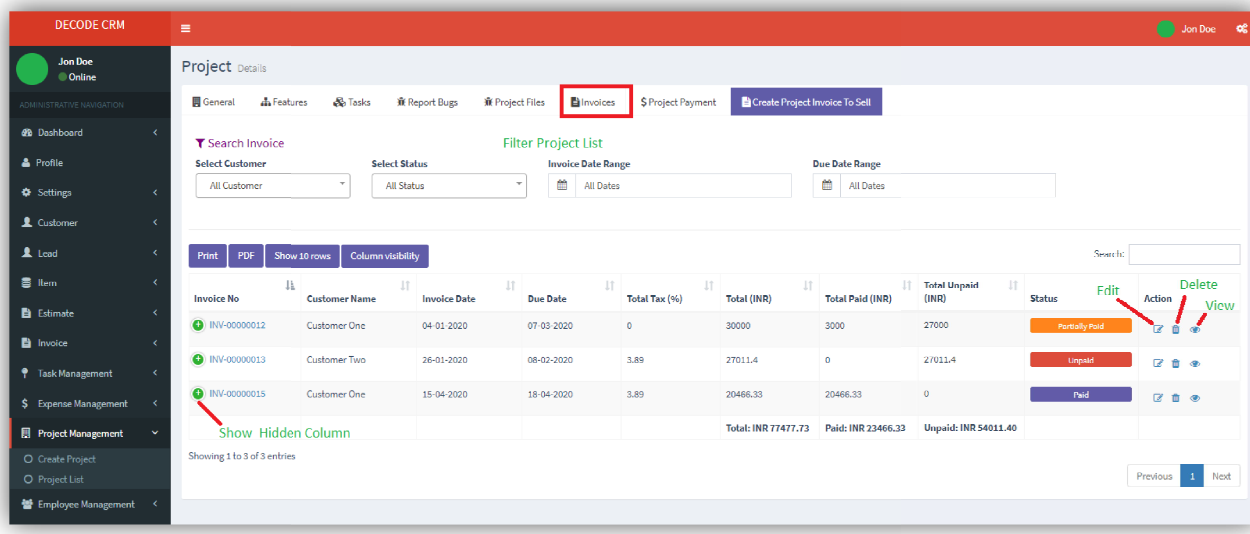


Fig 10.13 - Project Invoice List

10.3.8 Project Payment

User will see all payment history of a project in this section. The detail documentation about payment is given in section 5.3.3 & 5.3.4

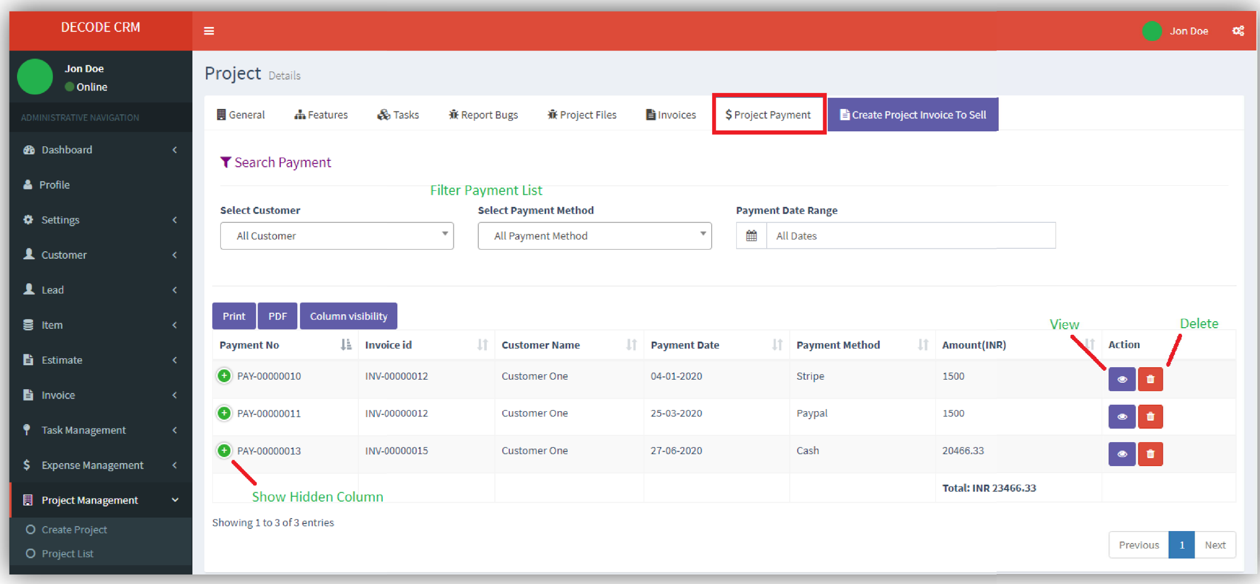


Fig 10.14 - Project Payment List

11. Employee Management

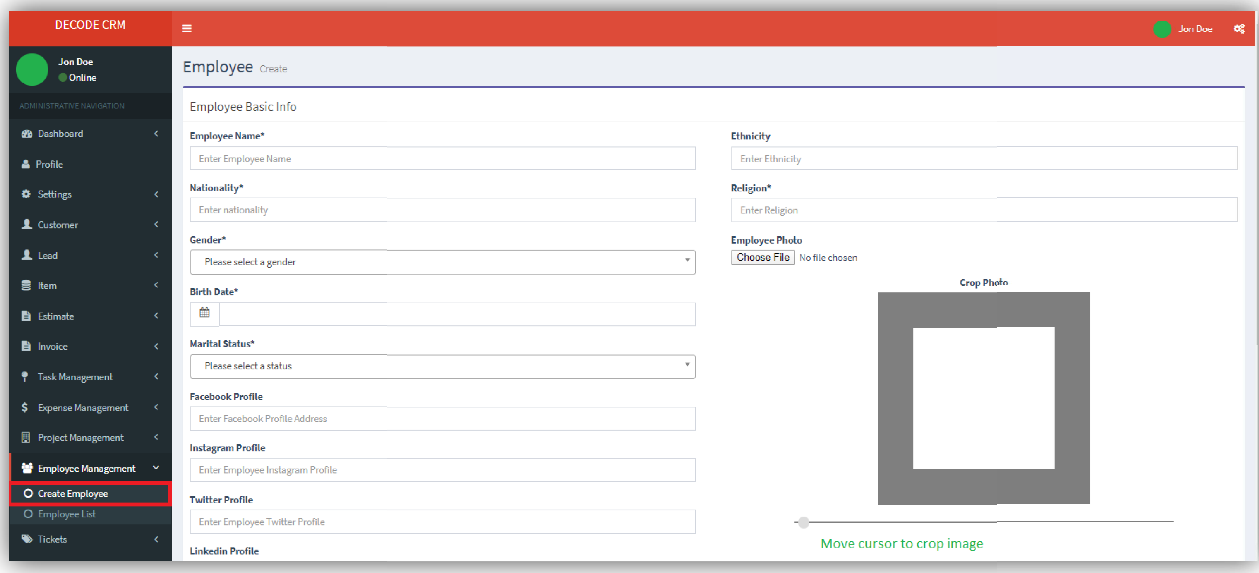
User can manage (create, edit, delete) & see details of employee from this module. Employee module has two sections.

- ➢ Create employee
- ➢ Employee List

11.1 Create Employee

- User can create employee after clicking “Create Employee” button inside “Employee Management” menu.
- After clicking “Create Employee” button user will see an employee creation form. User has to fill up all the mandatory fields (marked by *).

- User can crop employee image by moving the cursor under the selected image.
- After successful creation of an employee, this system will email the login credentials to the provided email address of that employee.
- Newly created employee's password will be "***abcdef***".
- While creating employee user has to select job status & designation. User will get job status & designation managing page by clicking "Employee Job Status" button & "Designation List" button inside "Settings page"



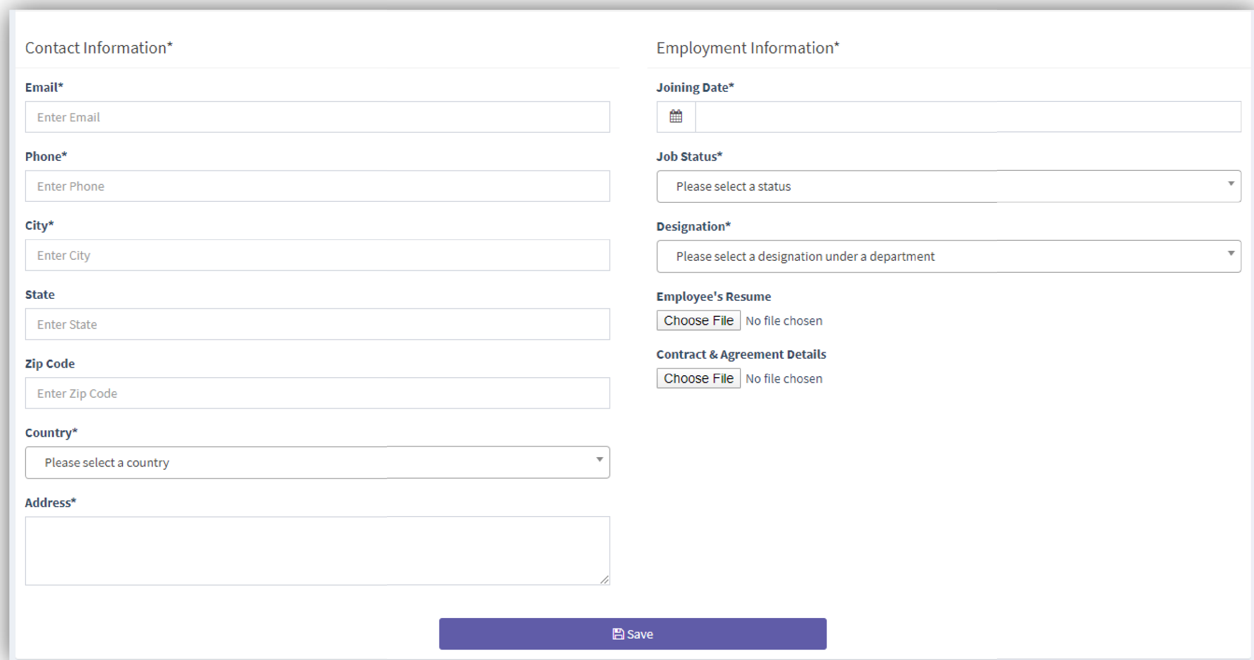


Fig 11.1 - Create Employee

11.2 Employee List

- User can see the employee list by clicking “Employee List” button inside “Employee Management” menu.
- User can filter employee by “Employee Name”, “Job Status”, “Joining Date” and “Designation”.
- User can hide/show particular column of employee list table by clicking “Column Visibility” button and then selecting a column which he wants to show/hide.
- User can see the hidden column by clicking “Plus” icon of a particular row.
- User can print or make pdf of the current page of the table by clicking “Print” or “PDF” button.
- User can edit, delete and see details of an employee by clicking “Edit’, “Delete” and “View” icon from action column of a particular row.
- Editing an employee is as same as creating a employee.

- If user edits any employee's email address, then that employee's password will be reset to "***abcdef***". The login credentials will be emailed.
- In order to delete an employee, user just has to confirm that he wants to delete all the details of that employee permanently.
- User can not delete an employee if that employee has dependency on project/task/lead/ticket or employee is an admin.

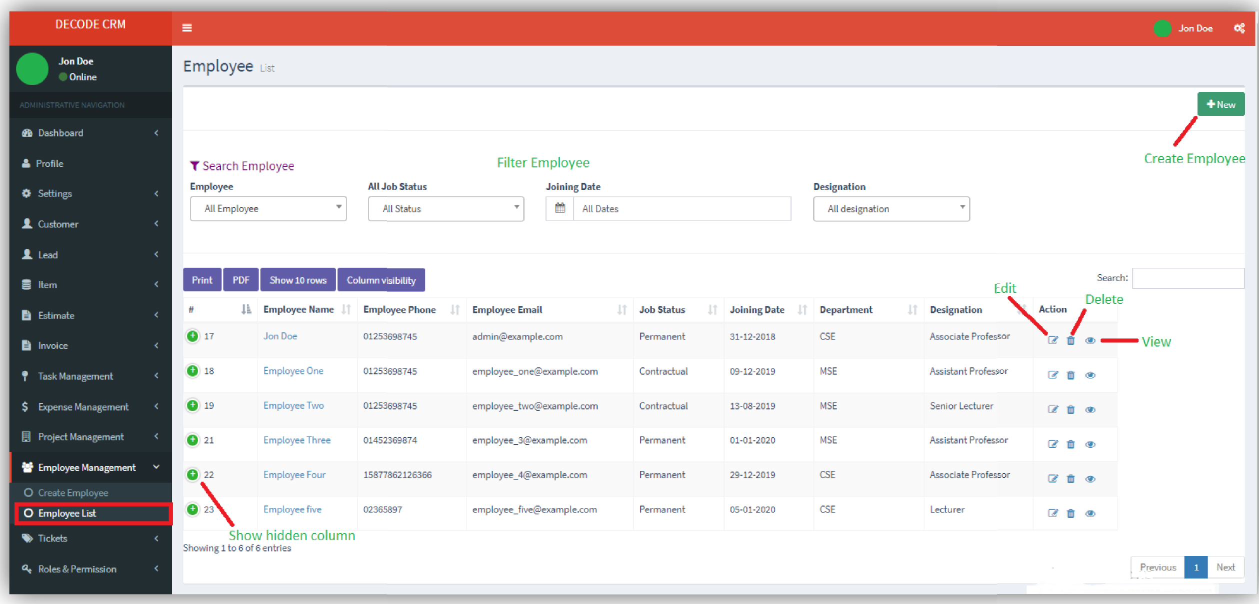


Fig 11.2 - Employee List

11.3 Employee Details

- In order to see the details of a particular employee, user has to click on "Employee Name" or "View" icon from the particular row.
- Inside employee details page, user can see, that employee's general details, project details, task details, lead details and ticket details inside "Profile General Info", "Project", "Tasks", "Leads", & "Tickets" section (more information of project, task, lead & ticket is given inside the documentations of these module)
- User can also search, edit, delete or see the details of project, tasks, lead & ticket details from there.

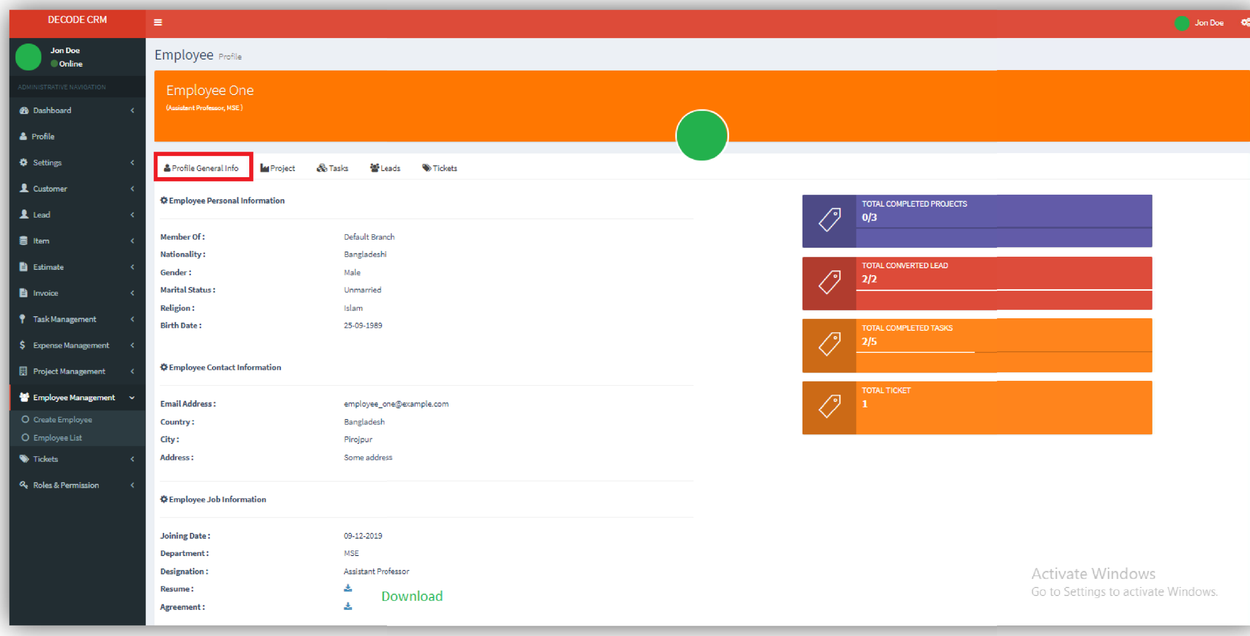


Fig 11.3 - Employee Details

12. Ticket Management

User can manage (create, edit, delete) ticket in this module. This module has 2 sections.

- Create Ticket
- Ticket List

12.1Create Ticket

- User can create ticket by clicking “Create Ticket” button inside “Tickets” menu.
- After clicking “Create Ticket” button user will get ticket creation form.
- User has to fill all the mandatory fields (marked by *).
- While creating ticket user has to select a ticket type. User will get ticket status managing page by clicking “Ticket Status” button inside “Settings Page”.

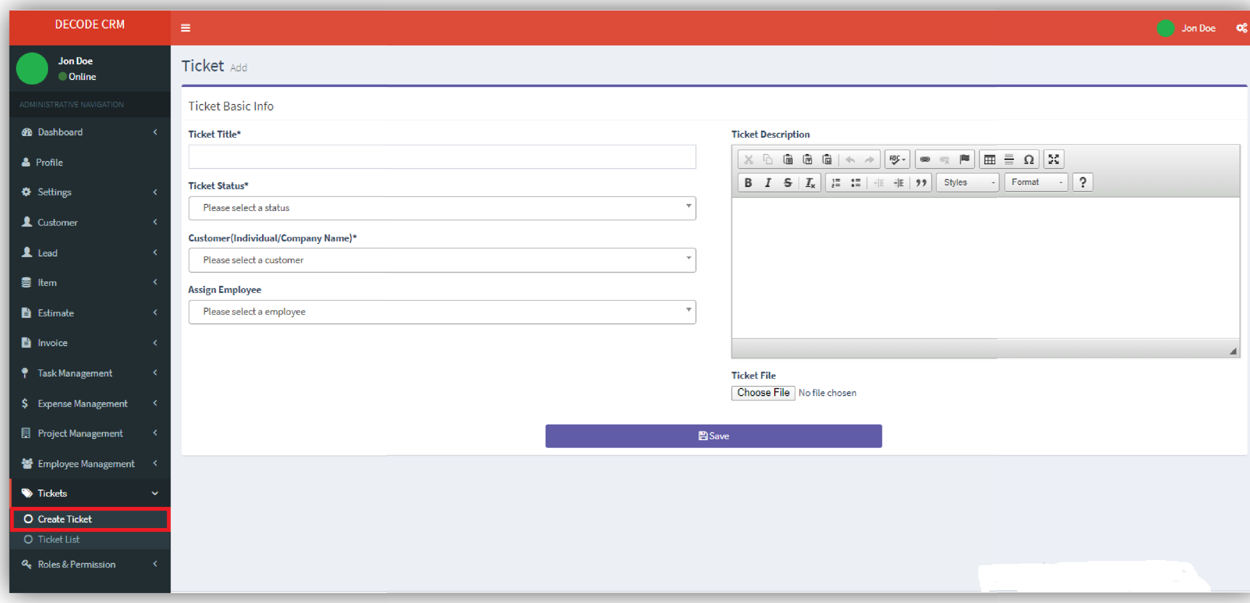


Fig 12.1 - Create Ticket

12.2Ticket List

- User can see the entire ticket list by clicking "Ticket List" button inside "Tickets" menu.
- User can filter ticket list by "Customer Name" & "Employee Name"
- User can hide particular column from the table by clicking "Column Visibility" button and then selecting a column, he wants to show/hide.
- User can see the hidden column by clicking "Plus" icon of a particular row.
- User can control the number of rows per page in the table by clicking "Show * rows" and then selecting number of row.
- User can print or make pdf of the current page of the table by clicking "Print" or "PDF" button.
- User can edit, delete ticket by clicking "Edit", "Delete" icon of a particular row's action column.

- User can also download ticket file (if any) by clicking "Download" icon of "Ticket File" column.
- Editing ticket is as same as creating ticket.
- In order to delete a ticket, user just has to confirm that he wants to delete all the details of that ticket permanently.

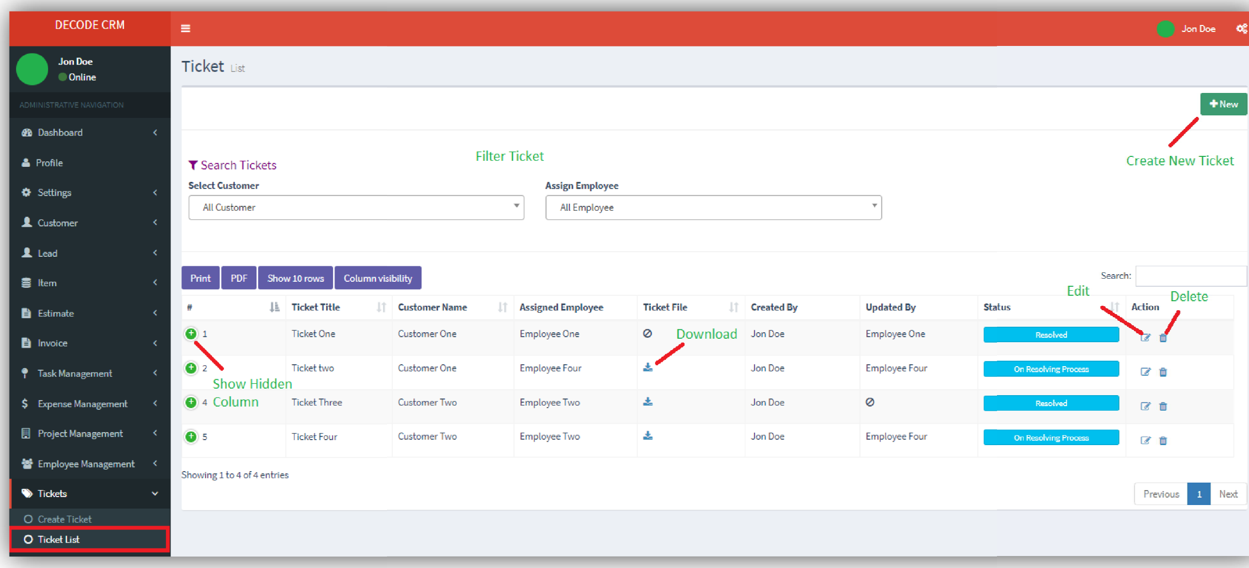


Fig 12.2 - Ticket List

13. Role & Permission

User can manage (create, edit, delete) roles and see role list in this section. User can also assign/remove roles to employee from this module. Moreover user can assign permissions to each role from here. This module has three sections

- Role List
- Employee Has Roles
- Roles Has Permissions

13.1 Role List

- User can go to this module by clicking "Role List" button inside "Role & Permission" menu
- User can create new roles and see role list from here
- User can create role by clicking "+New" button in top right corner
- After clicking "+New" button, a modal box (contains role creating form) will open.
- User has to fill all the necessary field (marked by *)
- User can edit the role by clicking "Edit icon" from the row of particular role's action column.
- Editing a role is as same as creating a role.
- User can delete role by clicking "Delete icon" from the row of particular role's action column
- In order to delete a role user just has to confirm that he wants to delete all the details of that role permanently.

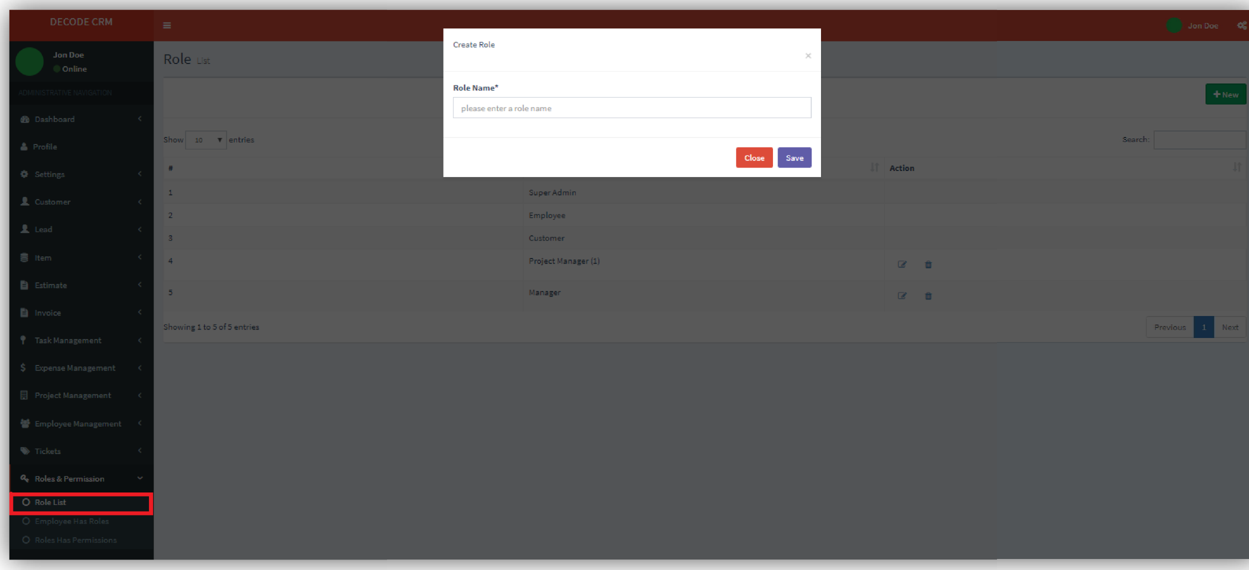


Fig 13.1 - Create Role

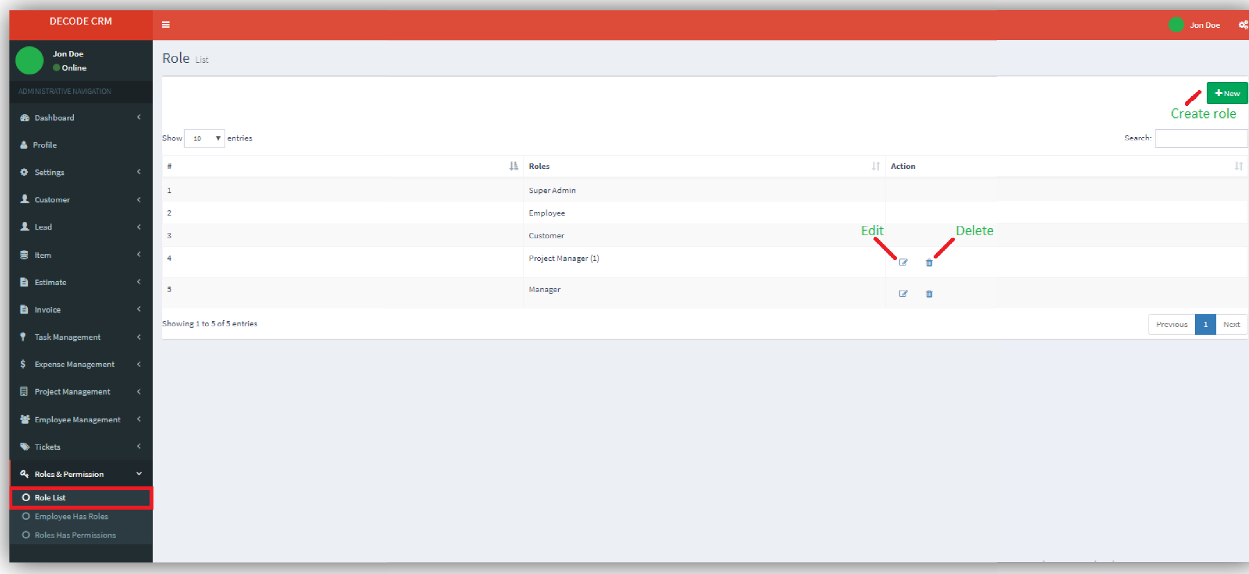


Fig 13.2 - Role List

13.2 Employee Has Roles

- User can go to this module by clicking "Employee Has Roles" button inside "Role & Permission" menu
- User can see assigned roles of each employee from here.
- User can also assign roles to employee by clicking "Plus" icon from the action column of particular employee.
- User can also delete assigned roles by clicking "Cross" icon of assigned role.

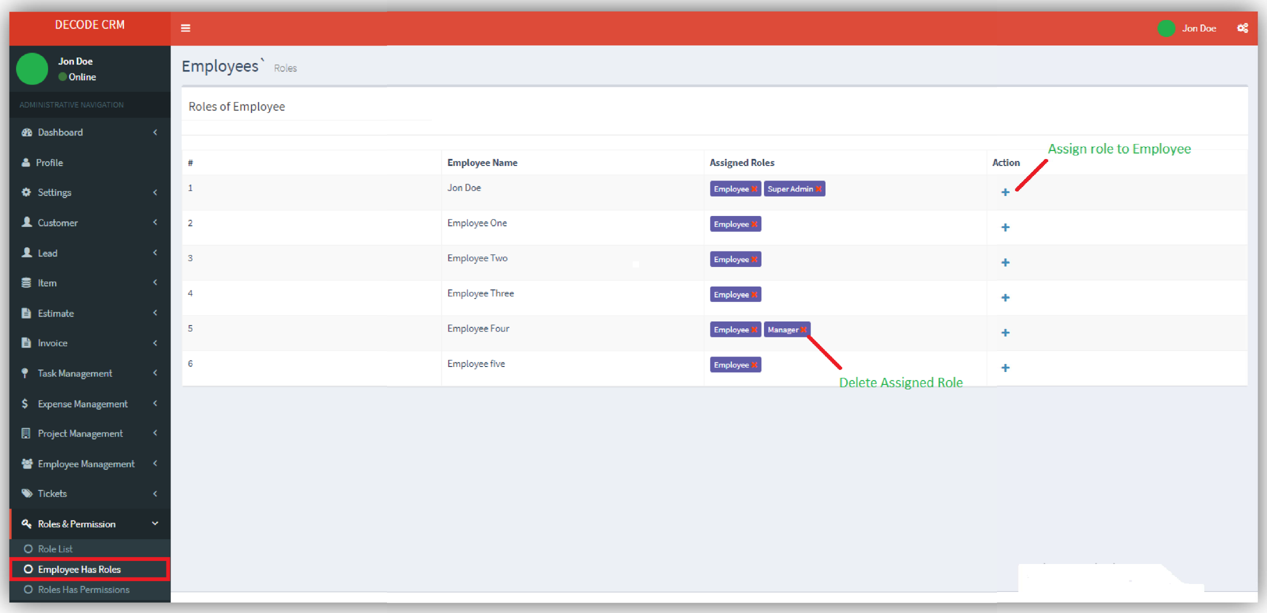


Fig 13.3 - Assigned Roles to Employee

13.3 Roles Has Permissions

- User can go to this module by clicking "Roles Has Permissions" button inside "Role & Permission" menu
- User can select and save permissions for each role from this module
- In order to give permission firstly user has to select particular role from the "Select Role" dropdown.

- After that user has to “Check” all the permissions he wants to give to the “Selected Role” and then click “Save Permissions Of This Role” button.

Component	Permissions	Permission’s Description
	Create(Only Applicable for this component)	Allow to create customer
	List View & Edit(Only Applicable for this component)	Allow to see customer list and edit customer
Customer	List View & Delete(Only Applicable for this component)	Allow to see customer list and delete customer
	List View & Show Details(Only Applicable for this component)	Allow to see customer list and see customer details
	Only List View(Only Applicable for this component)	Allow to see only customer list
	List View & Import(Only Applicable for this component)	Allow to see customer list and import customers

Component	Permissions	Permission’s Description
	Create(Only Applicable for this component)	Allow to create new lead
	List View & Edit(Only Applicable for this component)	Allow to see lead list and edit lead
	List View & Delete(Only Applicable for this component)	Allow to see lead list and delete lead
Lead	List View & Show Details(Only Applicable for this component)	Allow to see lead list and see lead details
	Only List View(Only Applicable for this component)	Allow to see only lead list
	Only List view of assigned lead to currently logged in employee	Allow to see only assigned lead to logged in employee
	List View & Convert Leads Into Customers	Allow to see lead list and convert lead into customer

Component	Permissions	Permission's Description
	Create(Only Applicable for this component)	Allow to create new product
	List View & Edit(Only Applicable for this component)	Allow to see product list and edit product
Product	List View & Delete(Only Applicable for this component)	Allow to see product list and delete product
	Only List View(Only Applicable for this component)	Allow to see only product list
	List View & Import(Only Applicable for this component)	Allow to see product list and import products

Component	Permissions	Permission's Description
	Create(Only Applicable for this component)	Allow to create new estimate
	List View & Edit(Only Applicable for this component)	Allow to see estimate list and edit estimate
Estimate	List View & Delete(Only Applicable for this component)	Allow to see estimate list and delete estimate
	List View & Show Details(Only Applicable for this component)	Allow to see estimate list and see estimate details
	Only List View(Only Applicable for this component)	Allow to see only estimate list

Component	Permissions	Permission's Description
	Create(Only Applicable for this component)	Allow to create new invoice
	List View & Edit(Only Applicable for this component)	Allow to see invoice list and edit invoice
	List View & Delete(Only Applicable for this component)	Allow to see invoice list and delete invoice
	List View & Show Details(Only Applicable for this component)	Allow to see invoice list and see invoice details
Invoice	Only List View(Only Applicable for this component)	Allow to see only invoice list
	Only List view of logged in customer's invoice list	Allow to see invoice list only for logged in customer
	Create Payment	Allow to make payment
	Payment List	Allow to see payment list
	Show Payment List & View Payment Details	Allow see payment list and view payment details
	Show Payment List & Payment Delete	Allow to see payment list and delete payment

Component	Permissions	Permission's Description
	Create(Only Applicable for this component)	Allow to see task list create new task
	List View & Edit(Only Applicable for this component)	Allow to see task list and edit task
Task Management	List View & Delete(Only Applicable for this component)	Allow to see task list and delete task
	Only List View(Only Applicable for this component)	Allow to see only task list
	Only List view of assigned task to currently logged in employee	Allow to see only assigned task list

Component	Permissions	Permission's Description
	Create(Only Applicable for this component)	Allow to see expense list create new expense
	List View & Edit(Only Applicable for this component)	Allow to see expense list and edit expense
Expense Management	List View & Delete(Only Applicable for this component)	Allow to see expense list and delete expense
	Only List View(Only Applicable for this component)	Allow to see only expense list

Component	**Permissions**	**Permission’s Description**
	Create(Only Applicable for this component)	Allow to create new project
	List View & Edit(Only Applicable for this component)	Allow to see project list and edit project
	List View & Delete(Only Applicable for this component)	Allow to see project list and delete project
	List View & Show Details(Only Applicable for this component)	Allow to see project list and see project details
	Only List View(Only Applicable for this component)	Allow to see only project list
Project Management	Only List view of assigned project to currently logged in employee	Allow to see only assigned project to logged in employee
	Only List view of logged in customer's project list	Allow to see only logged in customer’s project
	Show Project Feature List	Allow to see project feature list
	Show Project Bug List	Allow to see project bug list
	Show Project File List	Allow to see project file list

Component	**Permissions**	**Permission’s Description**
	Create(Only Applicable for this component)	Allow to create new employee
	List View & Edit(Only Applicable for this component)	Allow to see employee list and edit employee
Employee Management	List View & Delete(Only Applicable for this component)	Allow to see employee list and delete employee
	List View & Show Details(Only Applicable for this component)	Allow to see employee list and see employee details
	Only List View(Only Applicable for this component)	Allow to see only employee list

Component	Permissions	Permission's Description
	Create(Only Applicable for this component)	Allow to create new ticket
	List View & Edit(Only Applicable for this component)	Allow to see ticket list and edit ticket
Ticket Management	List View & Delete(Only Applicable for this component)	Allow to see ticket list and delete ticket
	Only List View(Only Applicable for this component)	Allow to see only ticket list
	Only List view of assigned ticket to currently logged in employee	Allow to see only assigned ticket to logged in employee
	Only List view of logged in customer's ticket list	Allow to see only logged in customer's ticket list

Component	Permissions	Permission's Description
	Create(Only Applicable for this component)	Allow create new service
	List View & Edit(Only Applicable for this component)	Allow to see service list and edit service
Service	List View & Delete(Only Applicable for this component)	Allow to see service list and delete service
	Only List View(Only Applicable for this component)	Allow to see only service list
	List View & Import(Only Applicable for this component)	Allow to see service list and import service

Component	Permissions	Permission's Description
Role & Permission	List View & Show Details(Only Applicable for this component)	Allow to see permissions against each role and also allow to give different permissions to each role

Component	Permissions	Permission's Description
Dashboard	List View & Show Details(Only Applicable for this component)	Allow to see dashboard

Component	Permissions	Permission’s Description
	Organization Profile	Allow to update organization profile
	Currency	Allow to create, edit, delete, see currency list & change default currency
	Unit of Measurement	Allow to create, edit, delete & see unit of measurement list
	Tax Type	Allow to create, edit, delete & see tax type list
	Invoice Terms and Conditions	Allow to change invoice terms and conditions
	Lead Status	Allow to create, edit, delete & see lead status list
	Task Status	Allow to create, edit, delete & see task status list
	Bug Status	Allow to create, edit, delete & see bug status list
	Expense Type	Allow to create, edit, delete & see expense type list
Settings	Ticket Status	Allow to create, edit, delete & see ticket status list
	Product Status	Allow to create, edit, delete & see product status list
	Job Status	Allow to create, edit, delete & see job status list
	Designation List	Allow to create, edit, delete & see designation list
	Employee Department	Allow to create, edit, delete & see department list
	SMTP setup	Allow to configure SMTP
	Change Password	Allow to change password
	Country List	Allow to see country list
	Language List	Allow to create, edit, delete & see language list

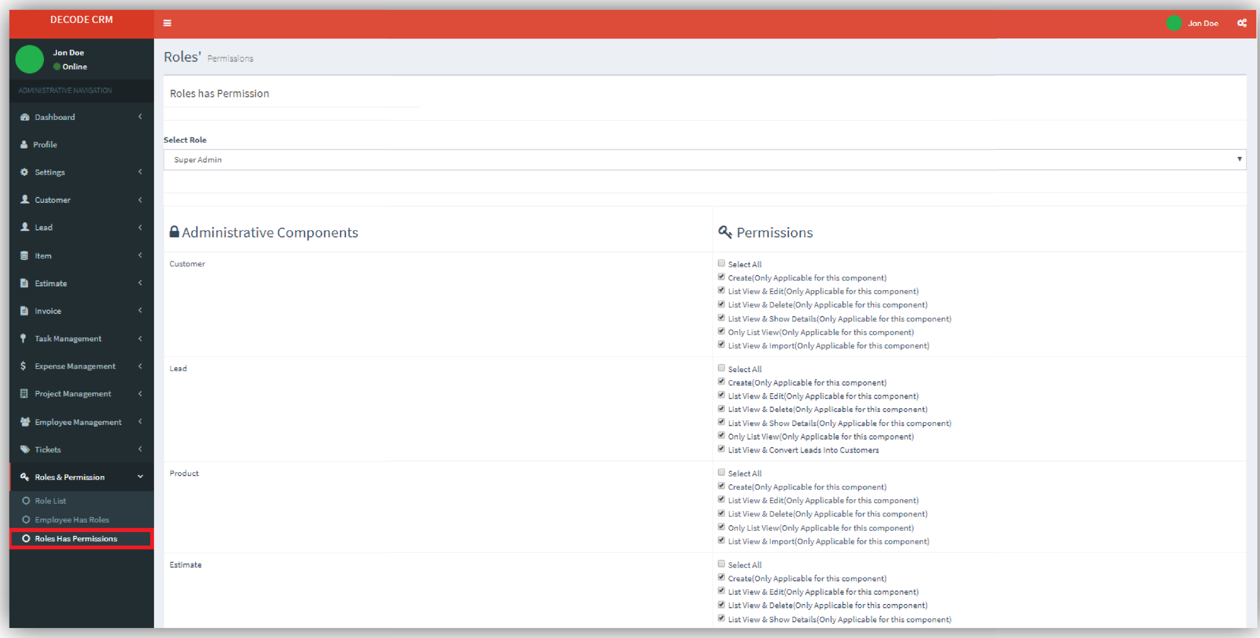


Fig 13.4 - Role Has Permissions

14. Settings

User can go to settings page by clicking “Settings” button inside “Settings” menu.

14.1 Organization Profile

- User can see organization profile by clicking “Organization Profile” button inside “Settings” page
- User can change organization details from this section
- In order to change/add profile details, user just has to click “Add Organization Info” button
- After clicking click “Add Organization Info” button user will get organization details changing form.
- User has to fill the mandatory fields (marked by *).

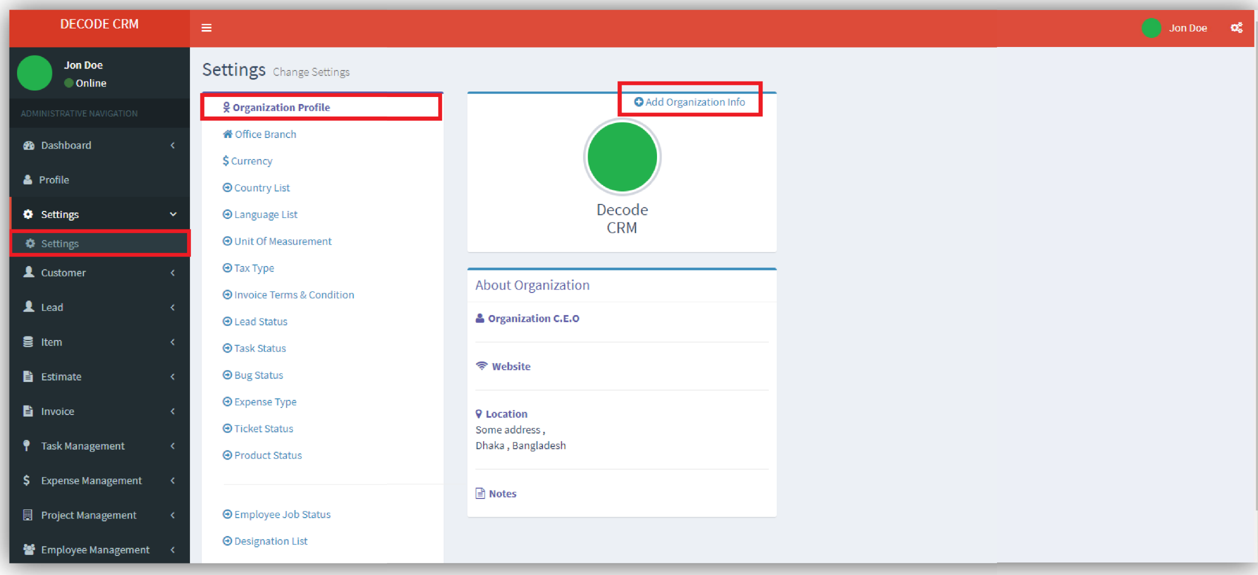


Fig 14.1 - Organization Profile

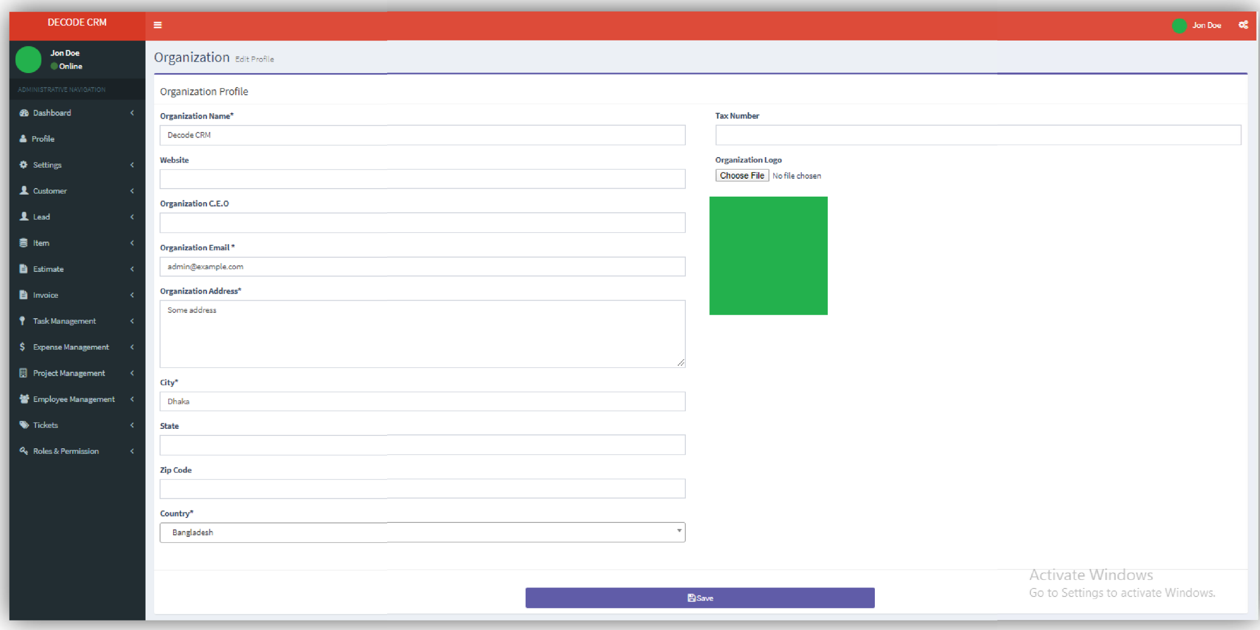


Fig 14.2 - Change Organization Profile Info

14.2 Currency

- User can get entire currency list by clicking “Currency” button inside settings.
- User can add, edit, delete and set default currency from this section
- In order to add currency user has to click “+New” button from the top right corner.
- After clicking “+New” button user will get a currency adding modal box, user has to fill the mandatory field (marked by *).
- Before adding currency user should see PayPal and stripe supported country and currency list.
- User can edit and delete currency by clicking “Edit” and “Delete” icon from action column.
- User can not delete default currency
- User can change the default currency by changing the “Switch” in “Default Currency” column.

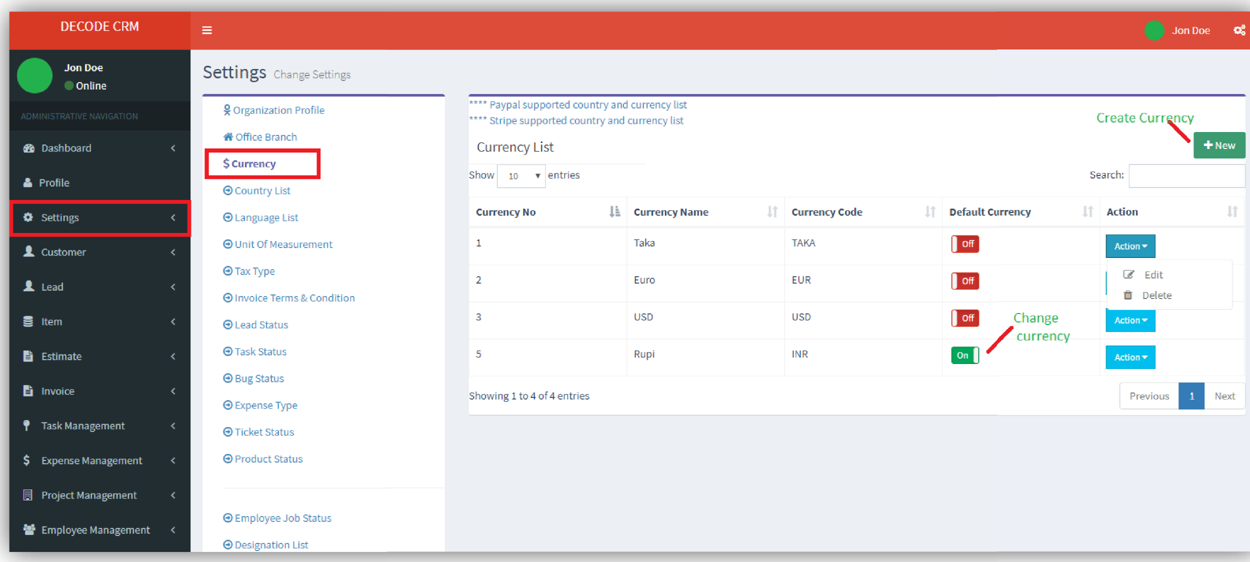


Fig 14.3 - Currency List

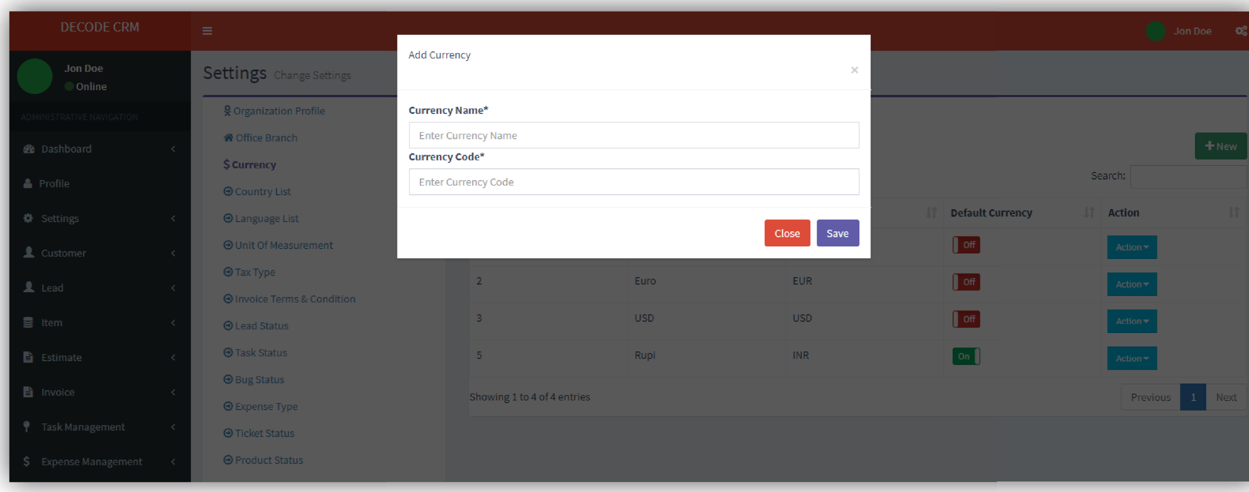


Fig 14.4 - Create Currency

14.3Country List

User can get entire country list by clicking “Country List” button inside “Settings page”

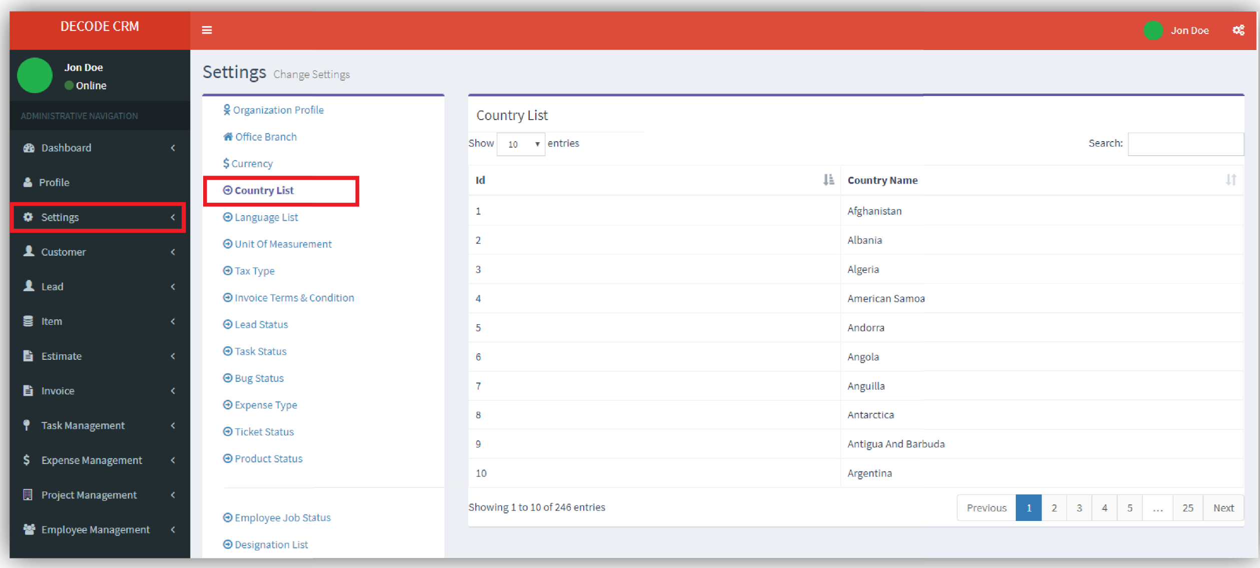


Fig 14.5 - Country List

14.4 Language List

- User can get entire language list by clicking “Language List” button inside settings page.
- User can add, edit and delete language from this section
- In order to add language user has to click “+New” button from the top right corner.
- After clicking “+New” button user will get a language adding modal box, user has to fill the mandatory field (marked by *).
- User can edit and delete language by clicking “Edit” and “Delete” icon from action column.
- User can not delete language which is in use

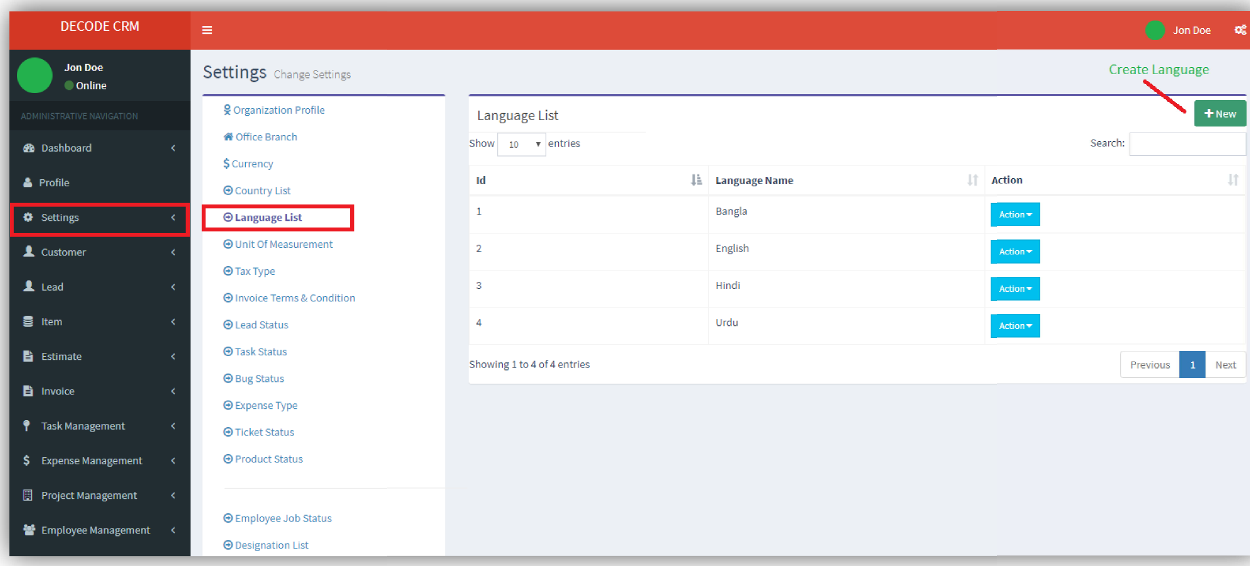


Fig 14.6 - Language List

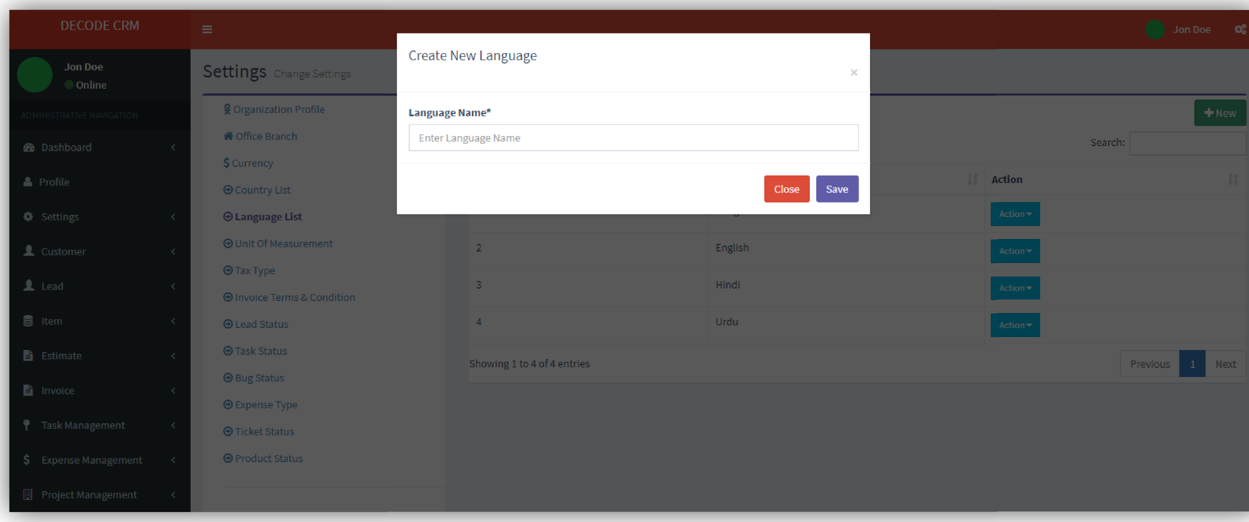


Fig 14.7 - Create Language

14.5 Unit of Measurement

- User can get entire unit of measurement list by clicking “Unit Of Measurement” button inside settings page.
- User can add, edit and delete unit of measurement from this section
- In order to add unit of measurement user has to click “+New” button from the top right corner.
- After clicking “+New” button user will get a unit of measurement adding modal box, user has to fill the mandatory field (marked by *).
- User can edit and delete unit of measurement by clicking “Edit” and “Delete” icon from action column.
- User can not delete unit of measurement which is in use

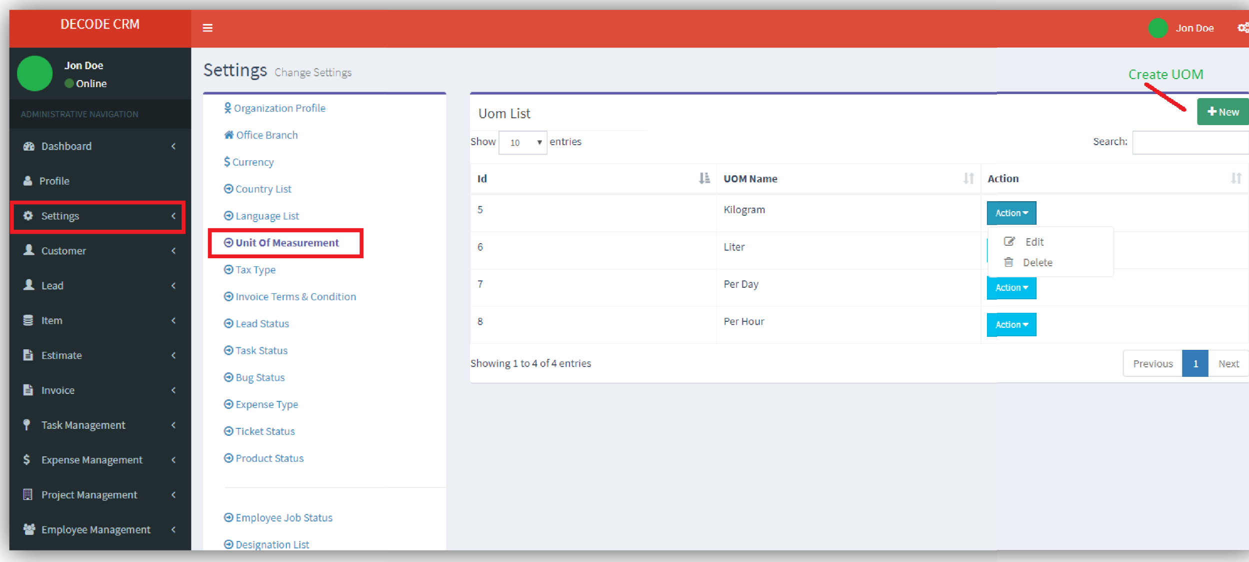


Fig 14.8 - UOM List

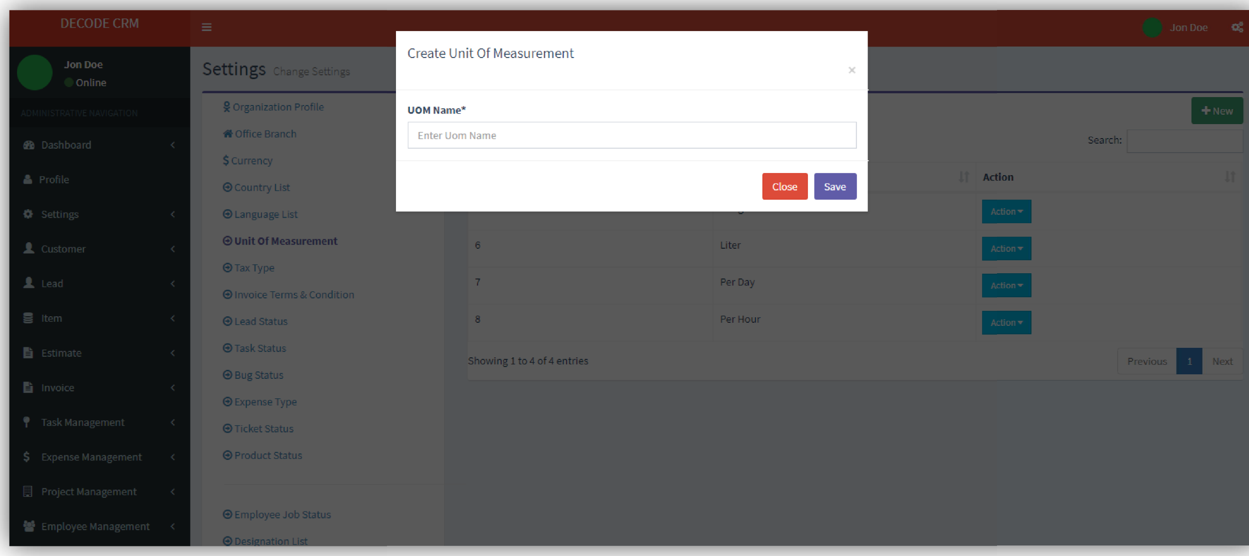


Fig 14.9 - Create UOM

14.6 Tax Type

- User can get entire tax type list by clicking “Tax Type” button inside settings page.
- User can add, edit and delete tax type from this section

- In order to add tax type user has to click “+New” button from the top right corner.
- After clicking “+New” button user will get a tax type adding modal box, user has to fill the mandatory field (marked by *).
- User can edit and delete tax type by clicking “Edit” and “Delete” icon from action column.
- User can not delete tax type which is in use

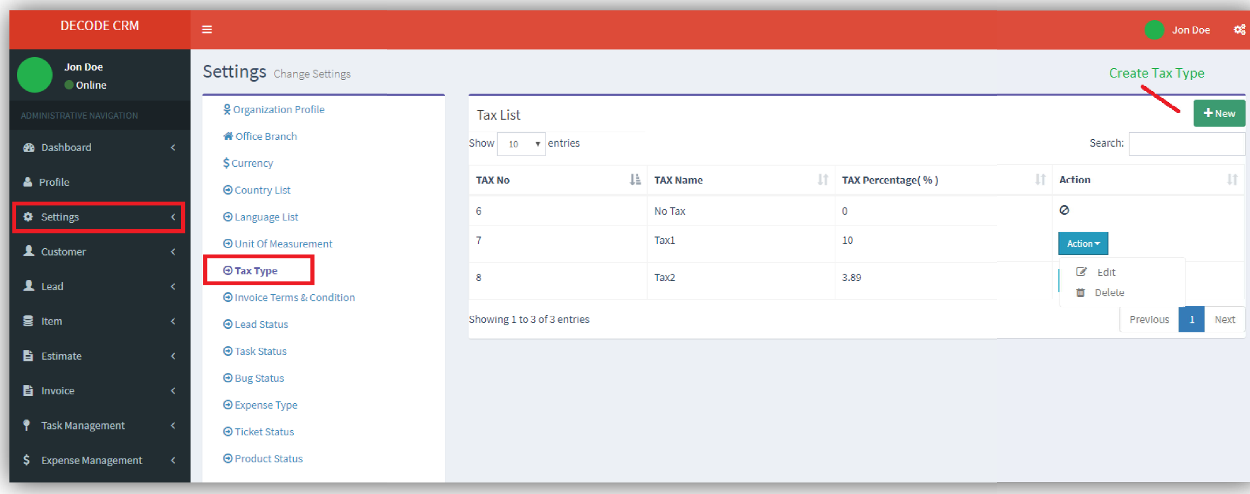


Fig 14.10 - Tax Type List

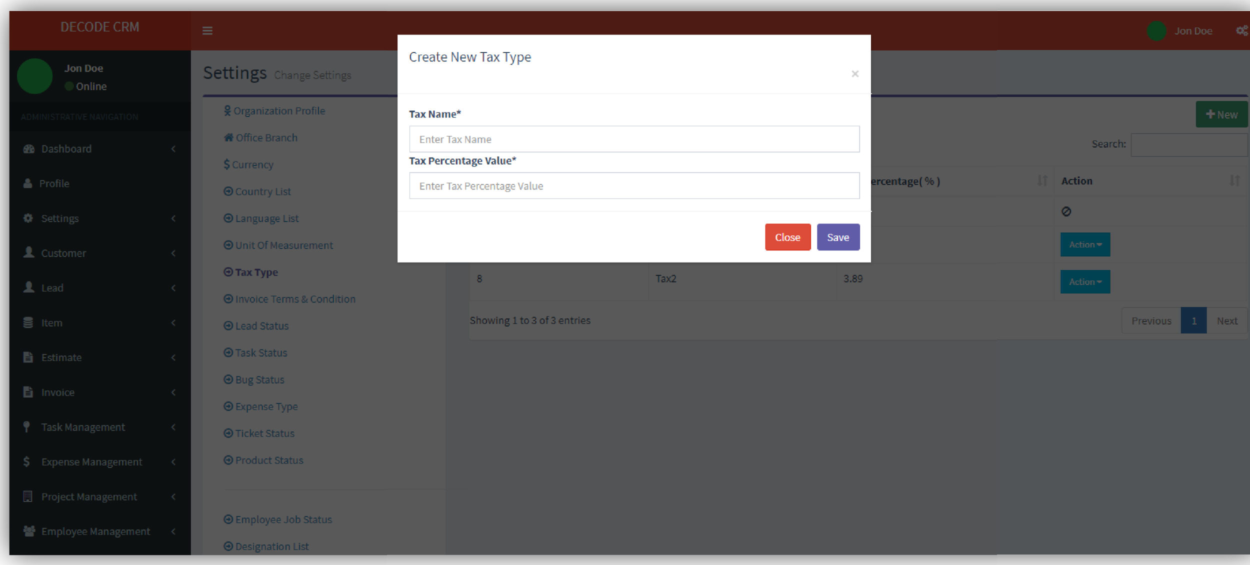


Fig 14.11- Create Tax Type

14.7 Invoice Terms & Conditions

User will see invoice terms & conditions by clicking “Invoice Terms & Condition” button inside settings page. User can change invoice terms and conditions by clicking “Edit” button and then updating terms & conditions.

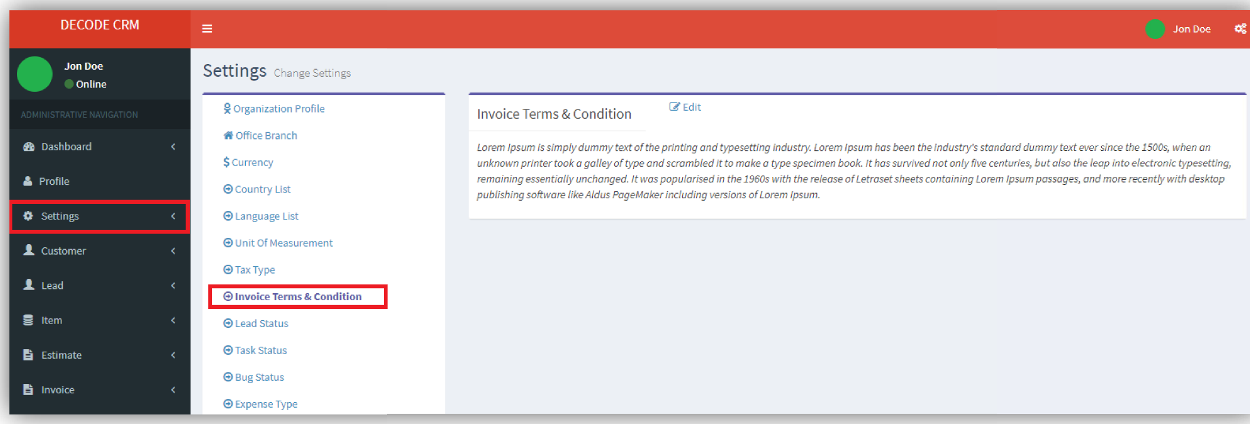


Fig 14.12 - Invoice Terms & Conditions

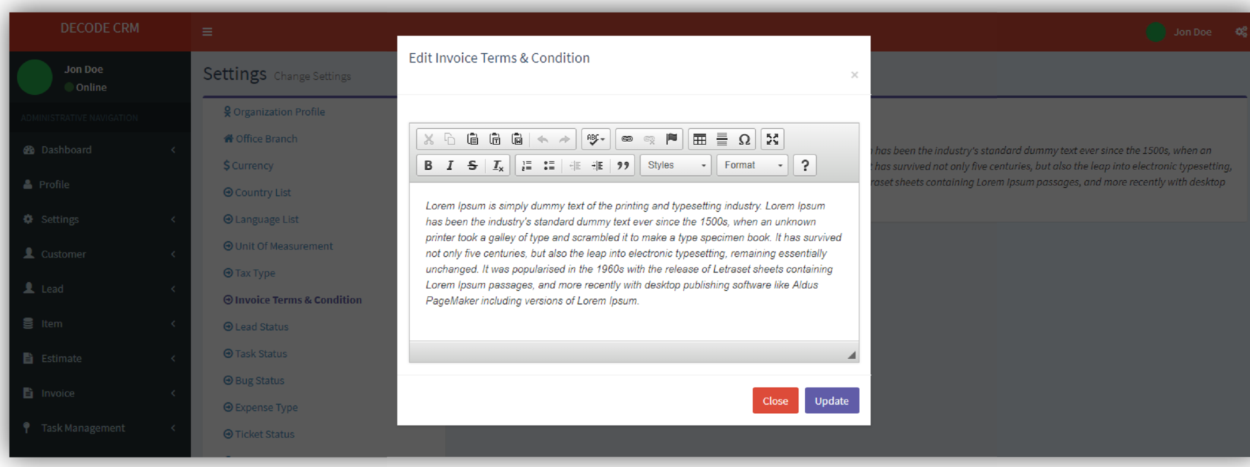


Fig 14.13 - Edit Invoice Terms & Conditions

14.8 Lead Status

- User can get entire lead status list by clicking “Lead Status” button inside settings page.
- User can add, edit and delete lead status from this section
- In order to add lead status user has to click “+New” button from the top right corner.
- After clicking “+New” button user will get a lead status adding modal box, user has to fill the mandatory field (marked by *).
- User can edit and delete lead status by clicking “Edit” and “Delete” icon from action column.
- User can not delete lead status which is in use

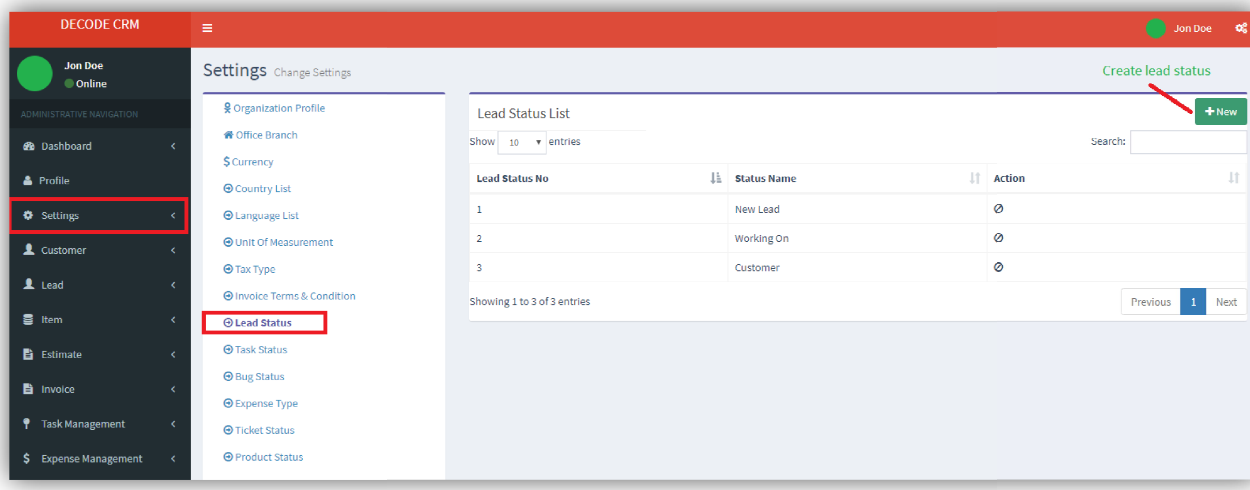


Fig 14.14 - Lead Status List

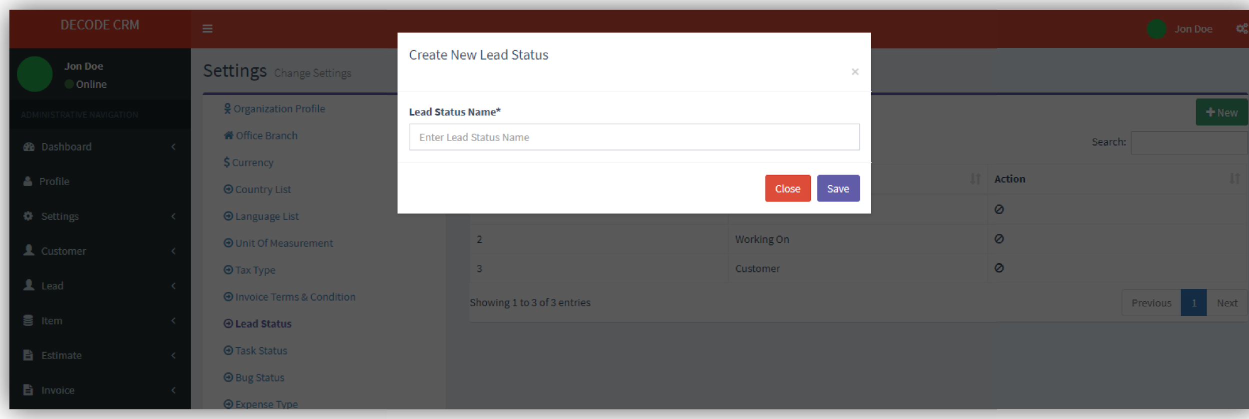


Fig 14.15 - Create Lead Status

14.9 Task Status

- User can get entire task status list by clicking “Task Status” button inside settings page.
- User can add, edit and delete task status from this section
- In order to add task status user has to click “+New” button from the top right corner.
- After clicking “+New” button user will get a task status adding modal box, user has to fill the mandatory field (marked by *).
- User can edit and delete task status by clicking “Edit” and “Delete” icon from action column.
- User can not delete task status which is in use

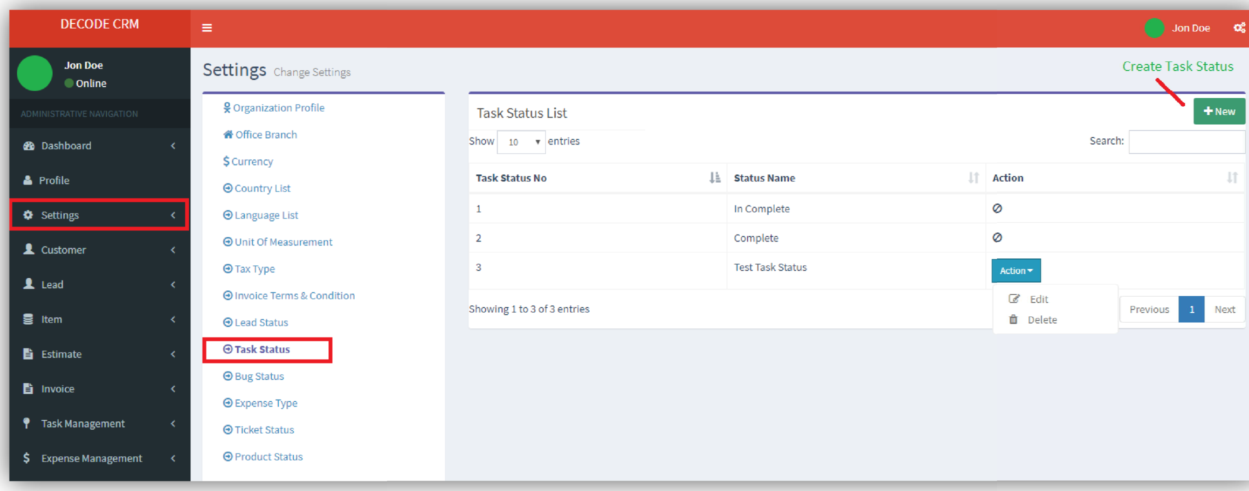


Fig 14.16 - Task status list

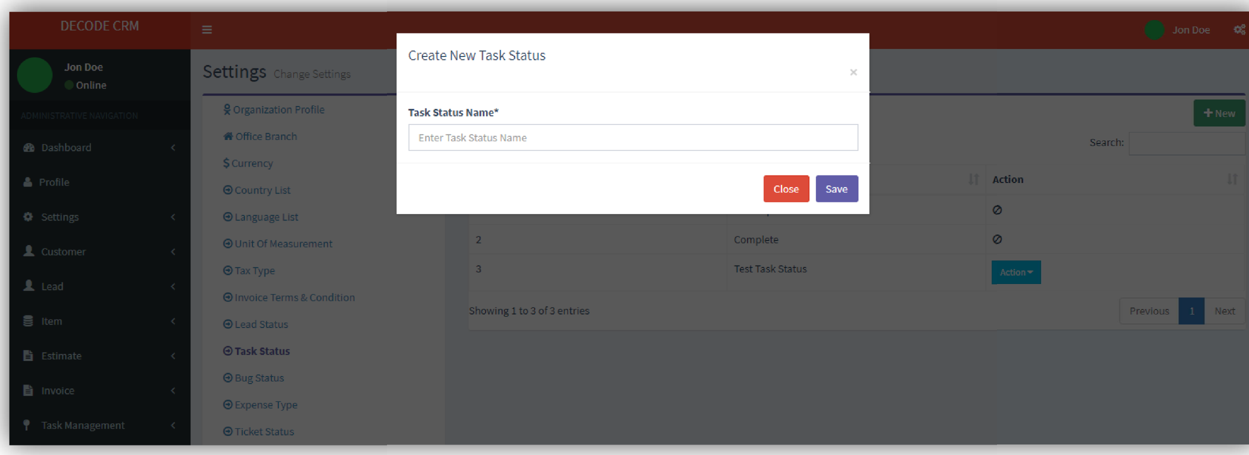


Fig 14.17 - Create Task Status

14.10 Bug Status

- User can get entire bug status list by clicking “Bug Status” button inside settings page.
- User can add, edit and delete bug status from this section
- In order to add bug status user has to click “+New” button from the top right corner.

- After clicking “+New” button user will get a bug status adding modal box, user has to fill the mandatory field (marked by *).
- User can edit and delete bug status by clicking “Edit” and “Delete” icon from action column.
- User can not delete bug status which is in use

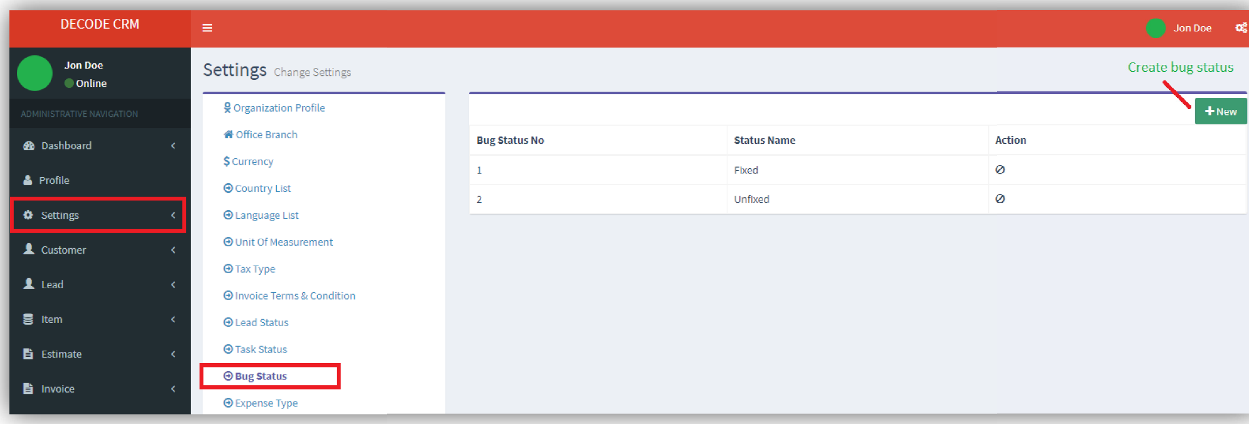


Fig 14.18 - Bug status list

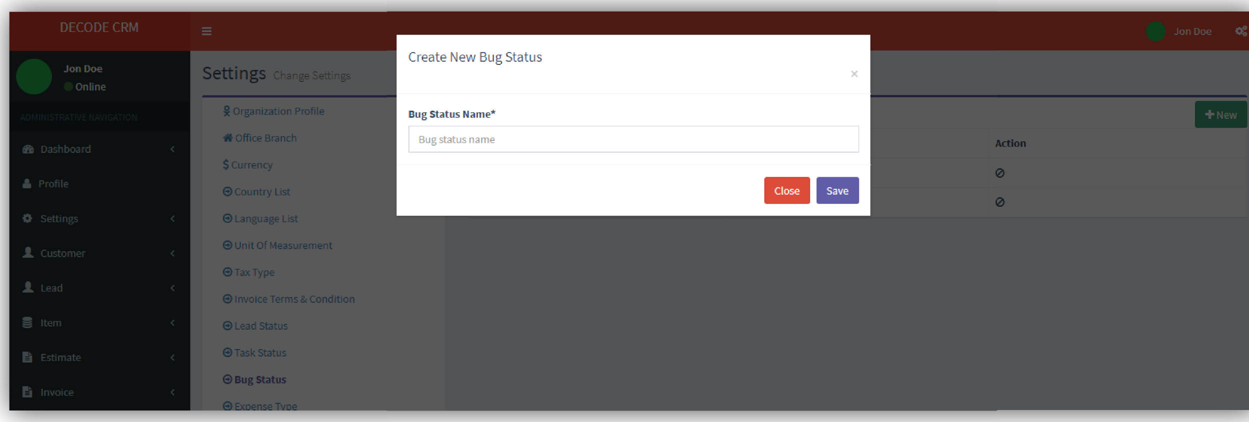


Fig 14.19 - Create Bug Status

14.11 Expense Type

- User can get entire expense type list by clicking “Expense Type” button inside settings page.
- User can add, edit and delete expense type from this section

- In order to add expense type user has to click "+New" button from the top right corner.
- After clicking "+New" button user will get an expense type adding modal box, user has to fill the mandatory field (marked by *).
- User can edit and delete expense type by clicking "Edit" and "Delete" icon from action column.
- User can not delete expense type which is in use

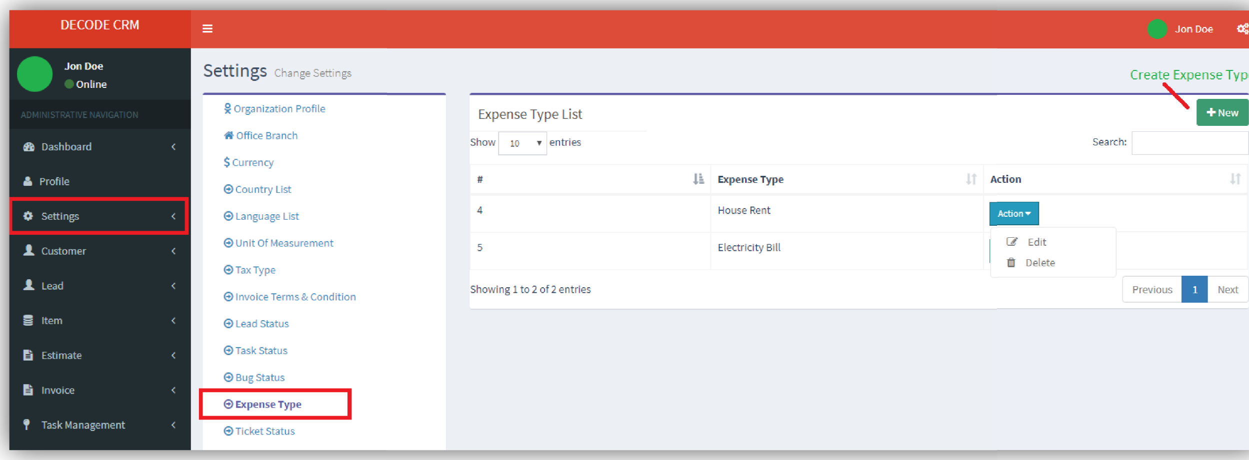


Fig 14.20 - Expense Type List

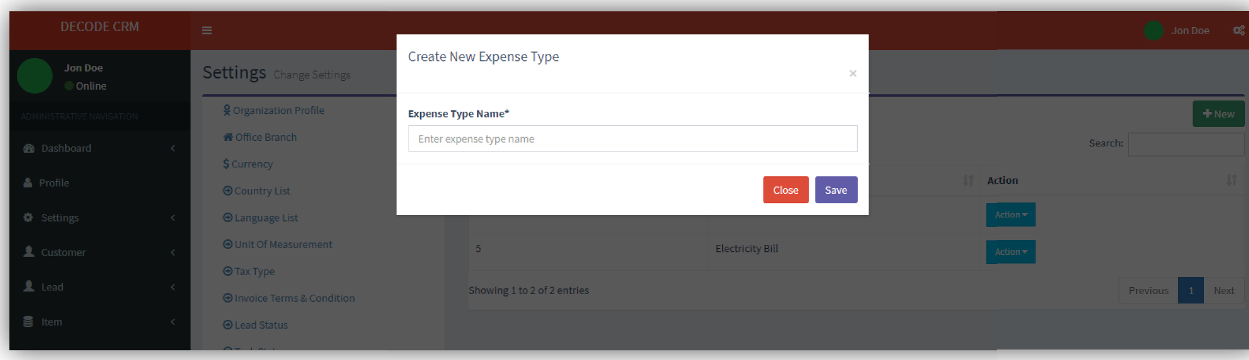


Fig 14.21 - Create Expense Type

14.12 Ticket Status

- User can get entire ticket status list by clicking "Ticket Status" button inside settings page.

- User can add, edit and delete ticket status from this section
- In order to add ticket status user has to click “+New” button from the top right corner.
- After clicking “+New” button user will get a ticket status adding modal box, user has to fill the mandatory field (marked by *).
- User can edit and delete ticket status by clicking “Edit” and “Delete” icon from action column.
- User can not delete ticket status which is in use

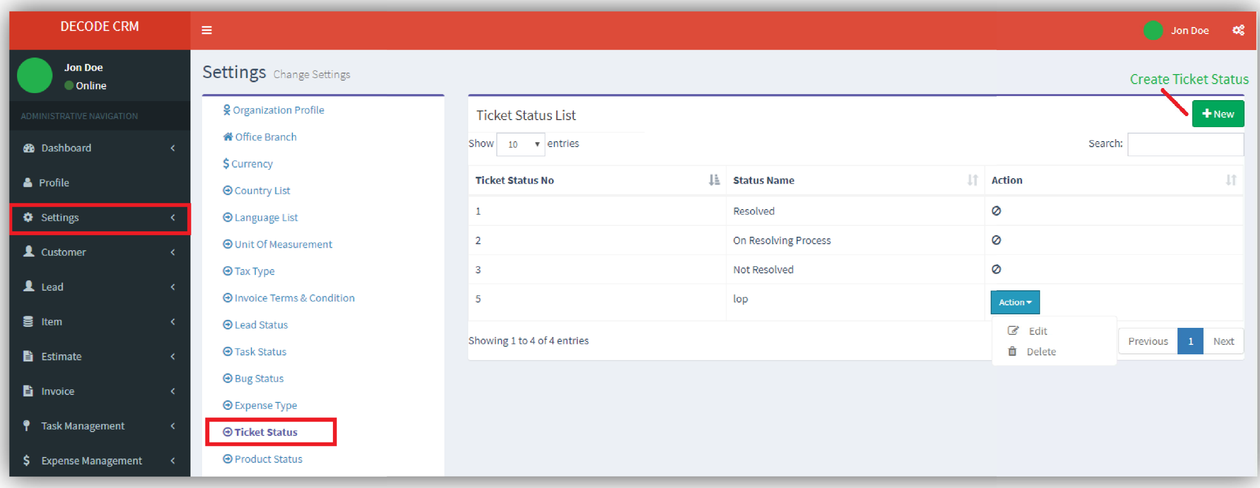


Fig 14.22- Ticket Status List

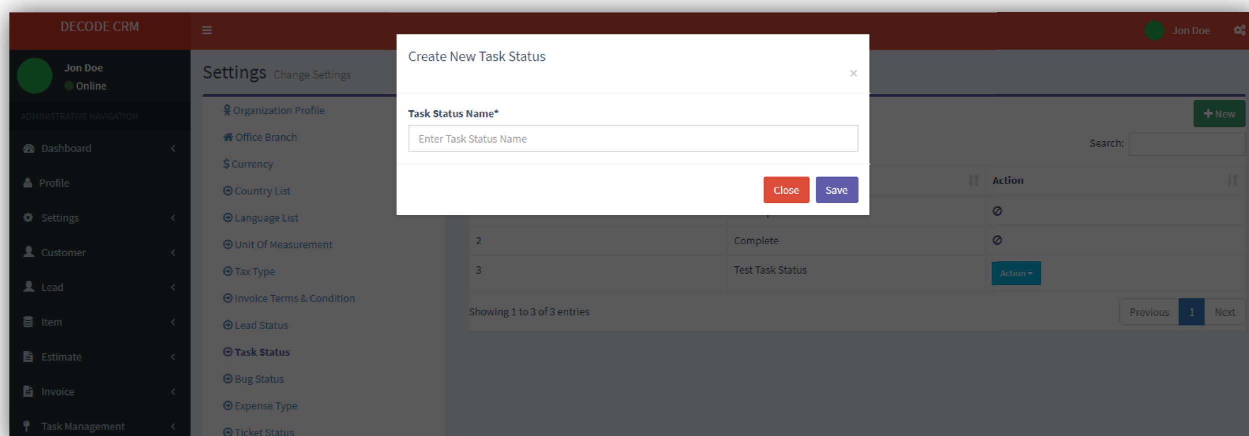


Fig 14.23 - Create Ticket Status

14.13 Product Status

- User can get entire product status list by clicking “Product Status” button inside settings page.
- User can add, edit and delete product status from this section
- In order to add product status user has to click “+New” button from the top right corner.
- After clicking “+New” button user will get a product status adding modal box, user has to fill the mandatory field (marked by *).
- User can edit and delete product status by clicking “Edit” and “Delete” icon from action column.
- User can not delete product status which is in use

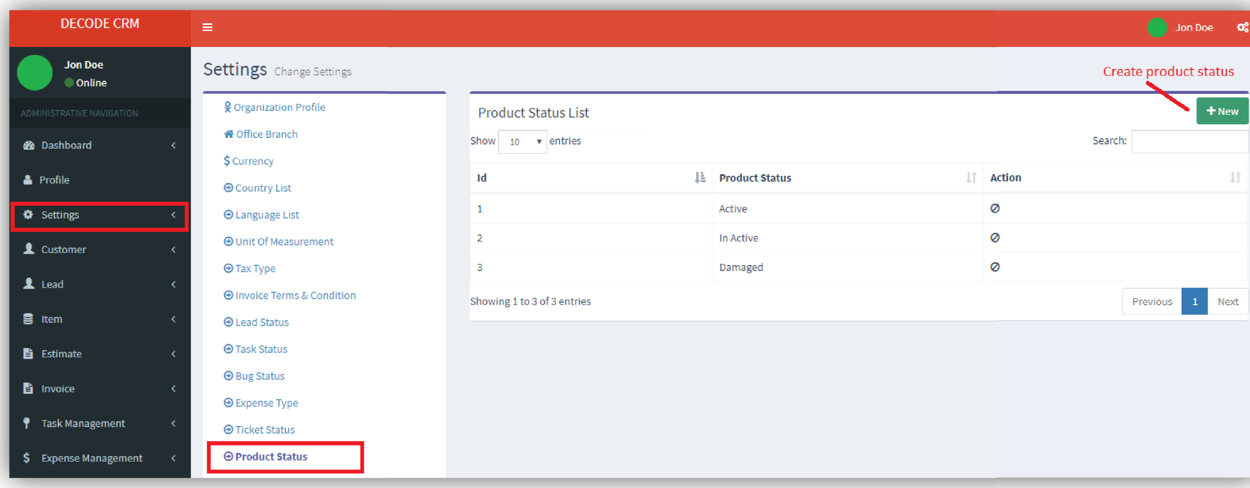


Fig 14.24 - Product Status List

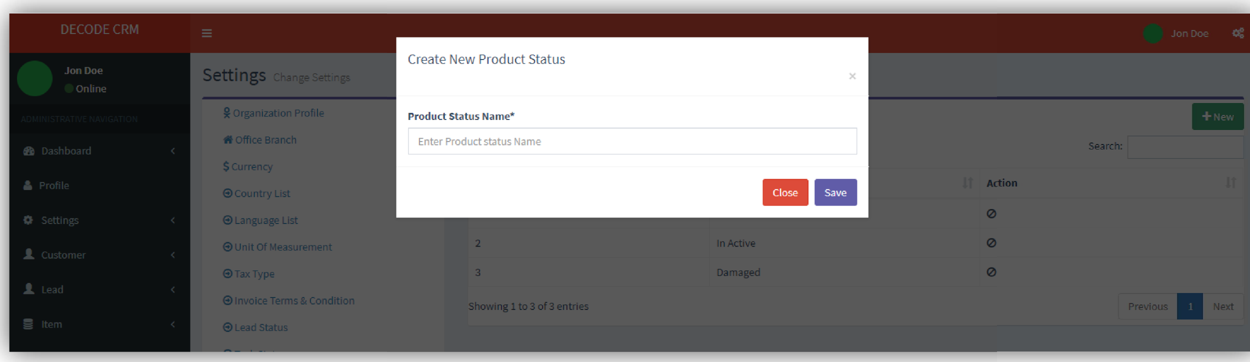


Fig 14.25 - Create Product Status

14.14 Employee Job Status

- User can get entire employee job status list by clicking “Employee Job Status” button inside settings page.
- User can add, edit and delete employee job status from this section
- In order to add employee job status user has to click “+New” button from the top right corner.
- After clicking “+New” button user will get an employee job status adding modal box, user has to fill the mandatory field (marked by *).
- User can edit and delete employee job status by clicking “Edit” and “Delete” icon from action column.
- User can not delete employee job status which is in use

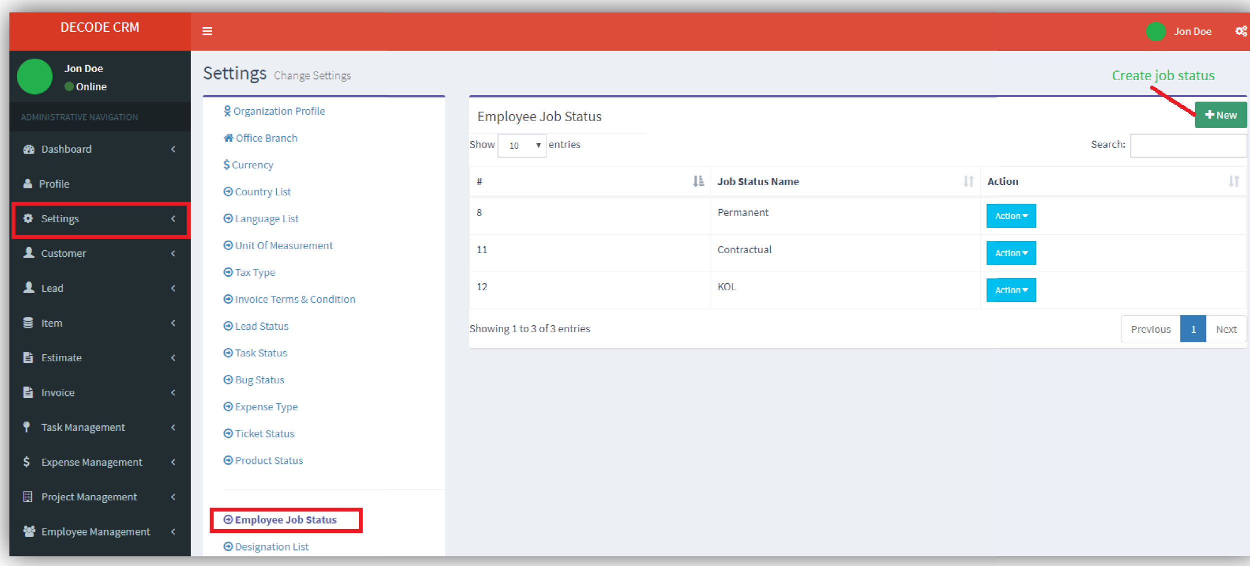


Fig 14.26 - Employee Job Status List

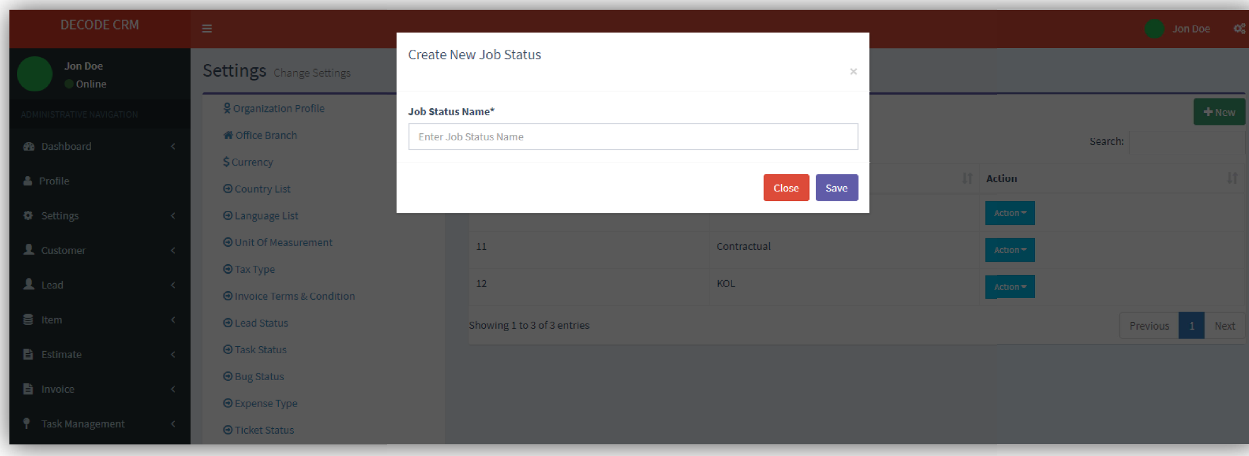


Fig 14.27 - Create Job Status

14.15 Designation List

- User can get entire designation list by clicking “Designation List” button inside settings page.
- User can add, edit and delete designation from this section
- In order to add designation user has to click “+New” button from the top right corner.
- After clicking “+New” button user will get a designation adding modal box, user has to fill the mandatory field (marked by *).
- User can edit and delete designation by clicking “Edit” and “Delete” icon from action column.
- User can not delete designation which is in use

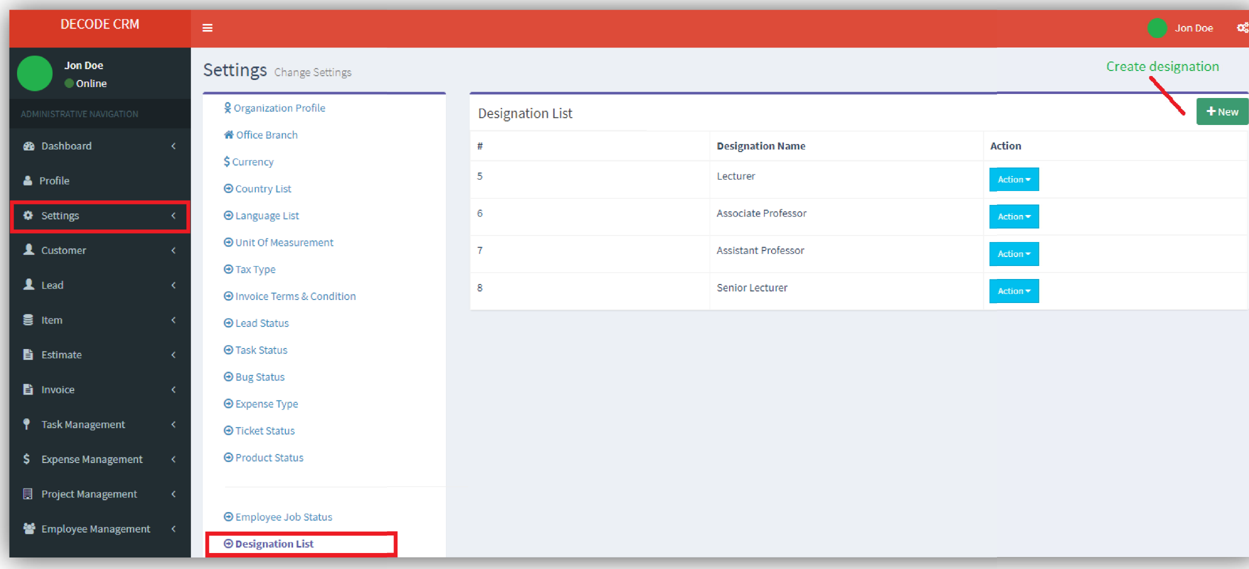


Fig 14.28 - Designation List

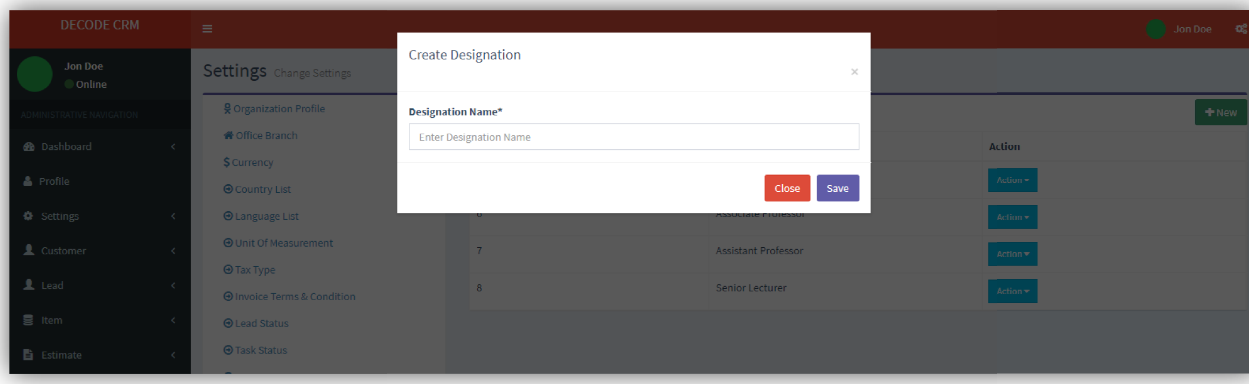


Fig 14.29 - Create Designation

14.16 Employee Department

- User can get entire department list with their designation by clicking “Employee Department” button inside settings page.
- User can add, edit, delete & assign designation to department from this section
- In order to add department user has to click “+New Department” button from the top right corner.

- After clicking “+New Department” button user will get a department adding modal box, user has to fill the mandatory field (marked by *).
- User can assign designation to department by clicking “+New Designation” button from top right corner
- User can edit and delete department by clicking “Edit” and “Delete” icon from action column.
- User can delete assigned designation of a department by clicking “cross” icon beside assigned designation
- User can not delete department/designation which is in use

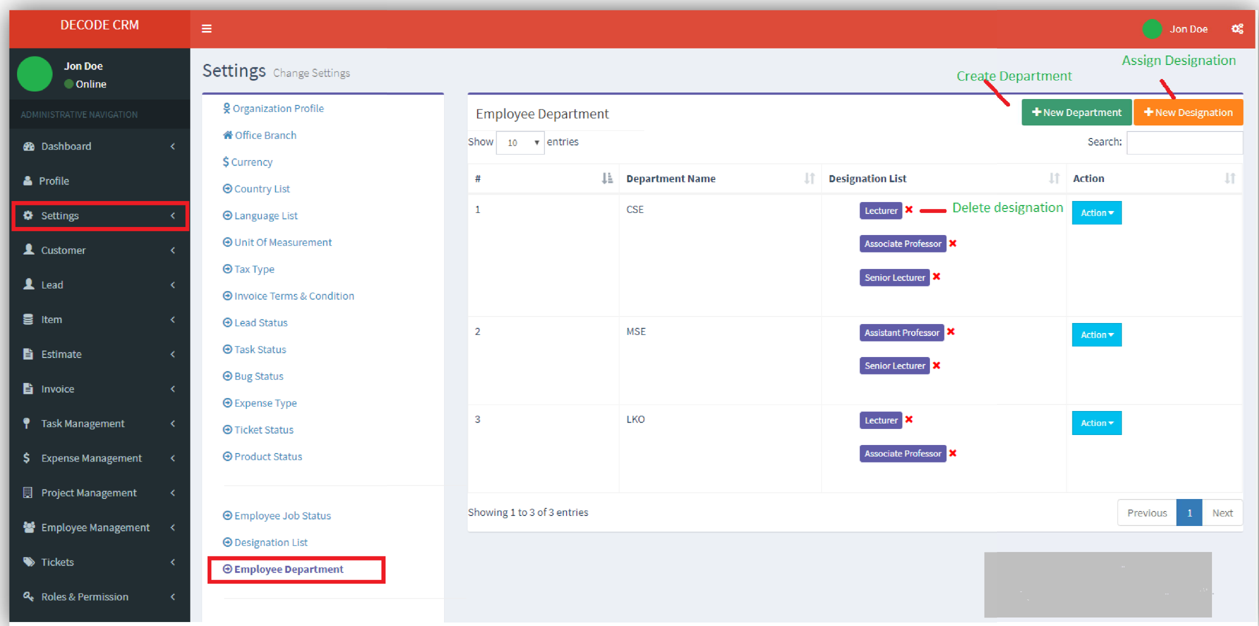


Fig 14.30 – Department List

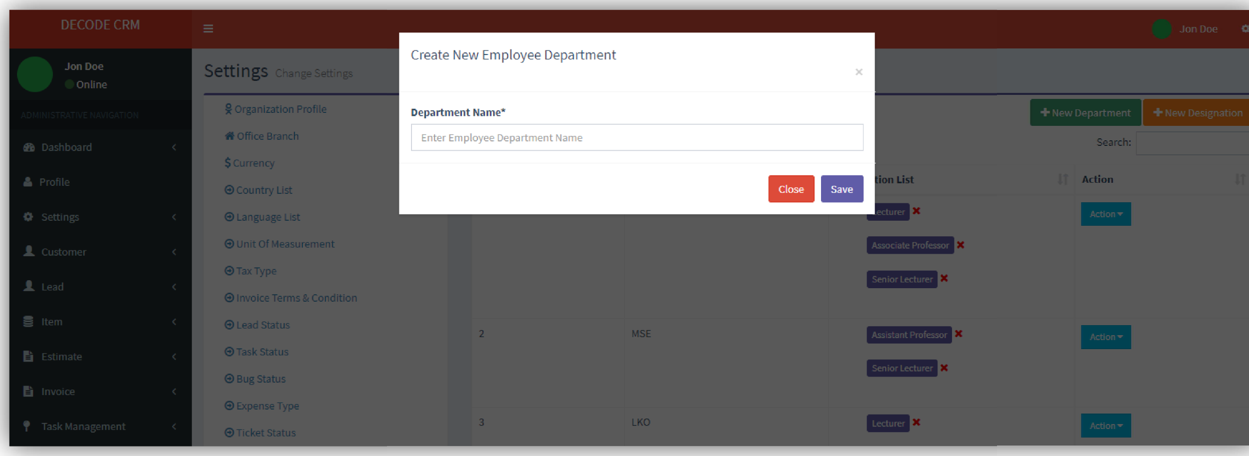


Fig14.31 - Create Department

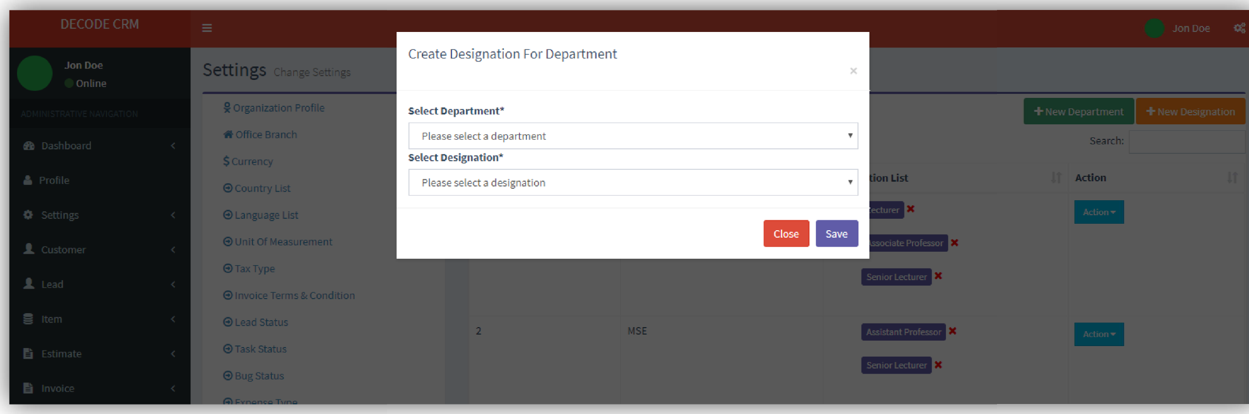


Fig 14.32 - Assign Designation

14.17 SMTP Setup

- User will get SMTP configuration details by clicking “SMTP Setup” button inside “Settings Page”.
- User can edit SMTP configuration by clicking “Edit” button from top right corner
- Remember that without configuring SMTP , Email won’t be sent

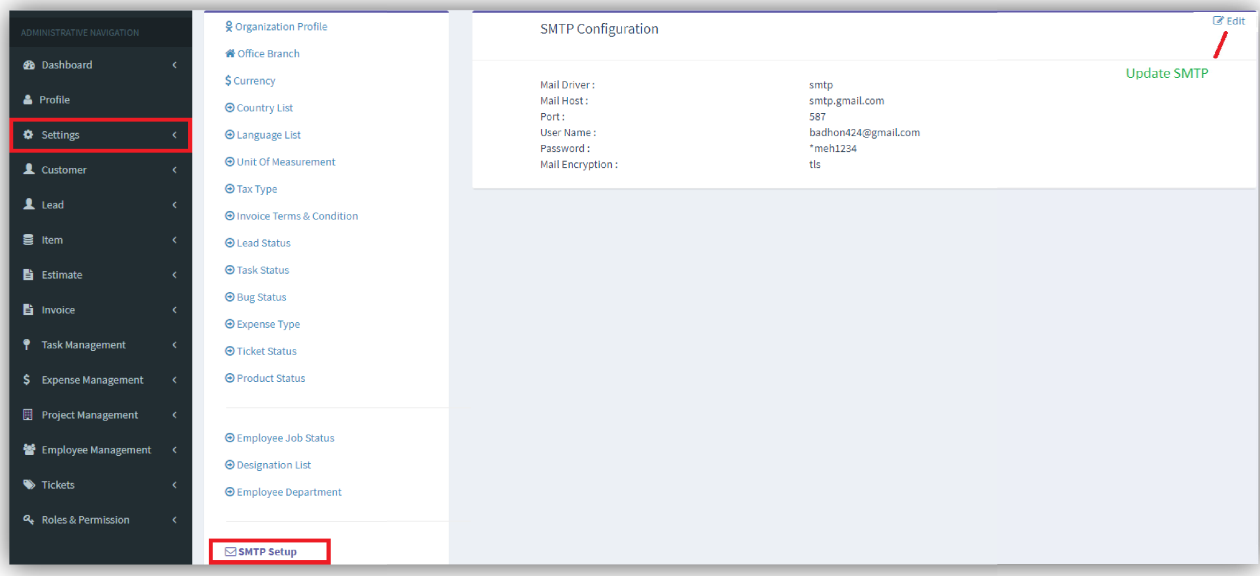


Fig14.33 – SMTP Details

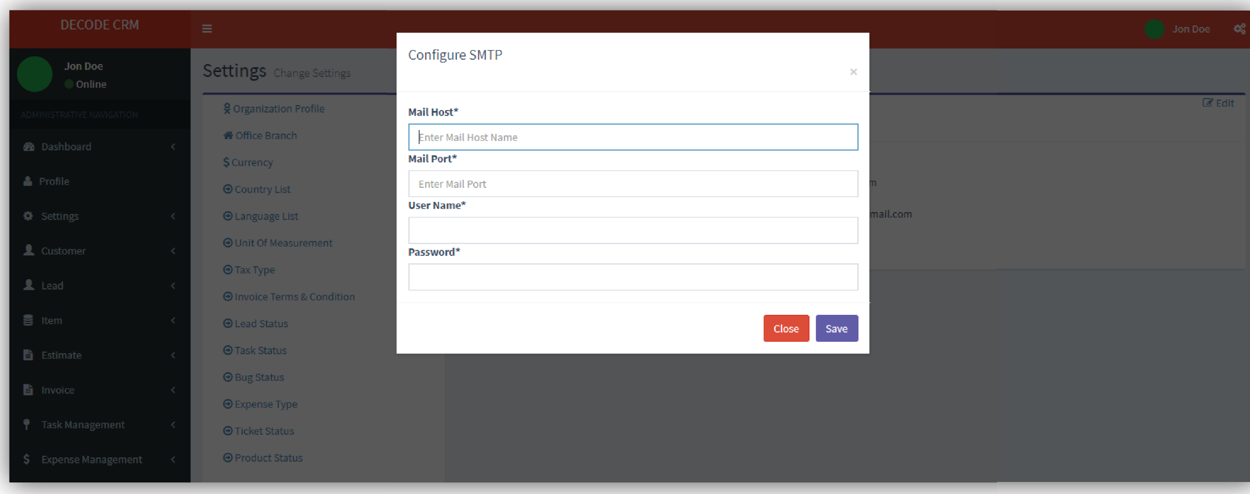


Fig 14.34 -Update SMTP

14.18 Change Password

User can get password changing form by clicking “Change Password” button inside “Settings Page”

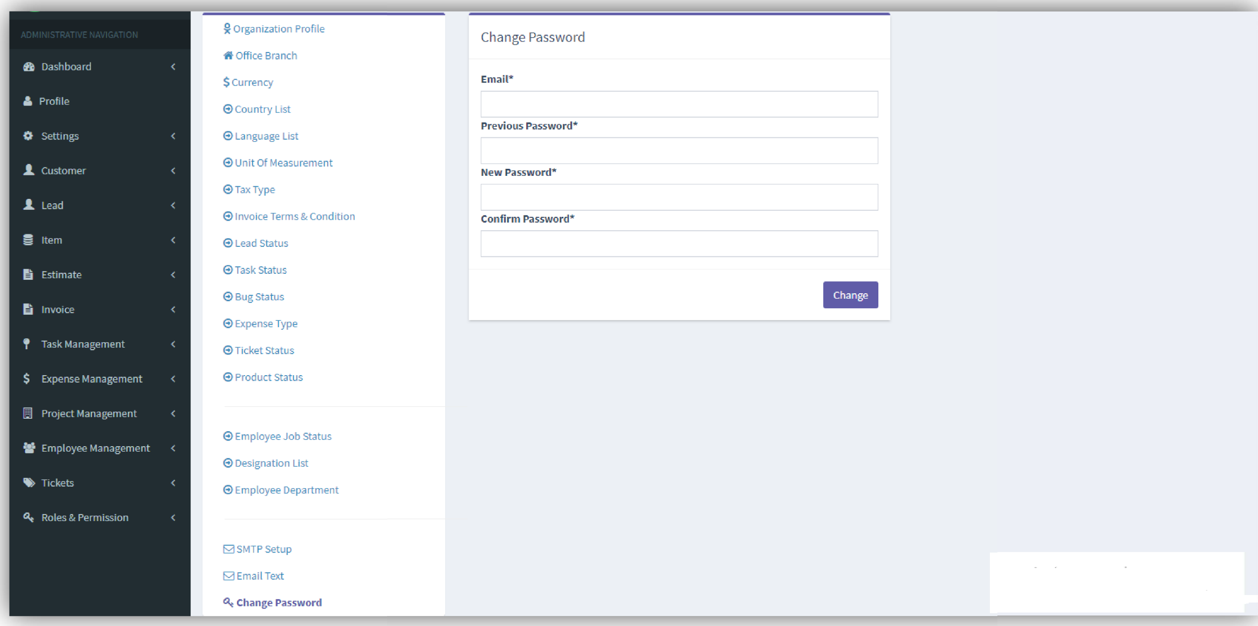


Fig 14.35 - Change Password

14.19 Change Favicon

User can change favicon of the browser by clicking “Change Favicon” button inside “Settings” page . You just have to browse an icon and then clicking “Upload” button.

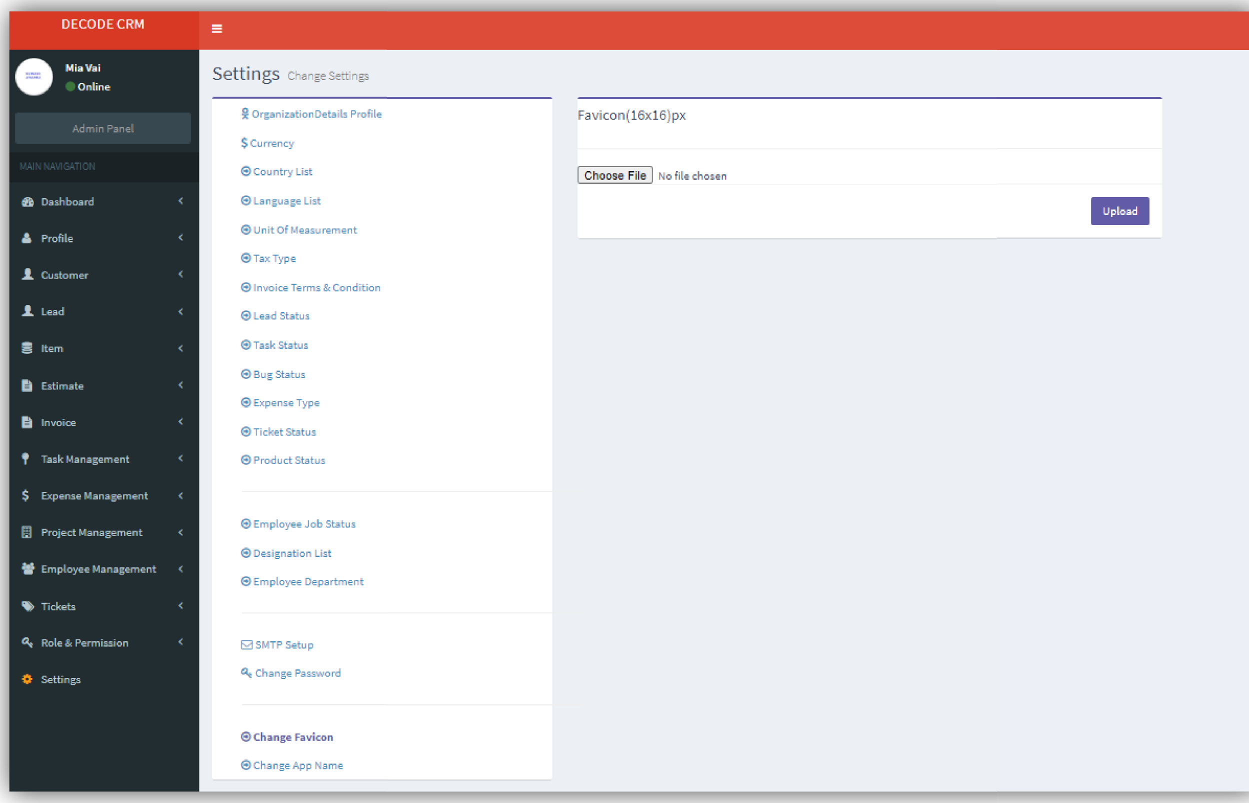


Fig 14.35 - Change Favicon

14.19 Change App Name

User can change app name by clicking “Change App Name” button inside “Settings” page . You just have to set a new name and click “Save” button.

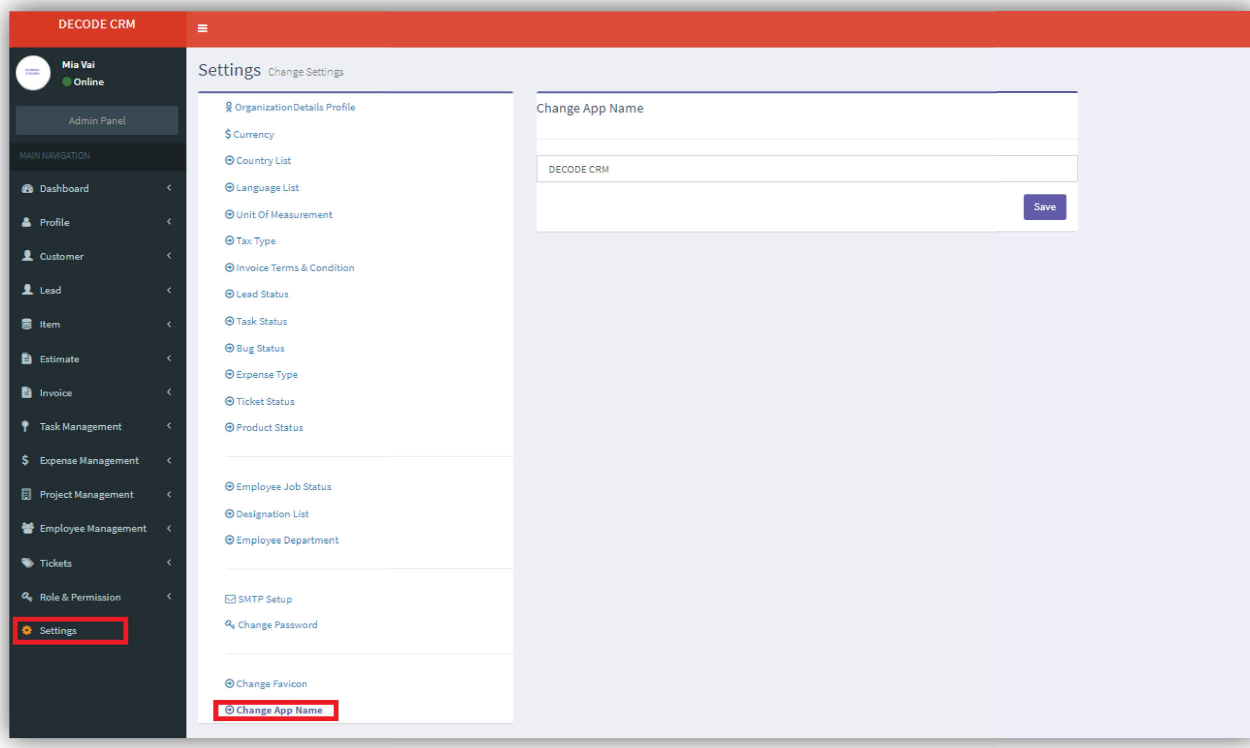


Fig 14.35 - Change App Name

***Things to Remember

In order to send email to customer, user has to configure SMTP. User will get SMTP configuration page by clicking “SMTP setup” button inside “Settings” page. More details about settings has discussed in settings documentation.