

## 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  $\geq 7.2.0$
  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 “public\_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

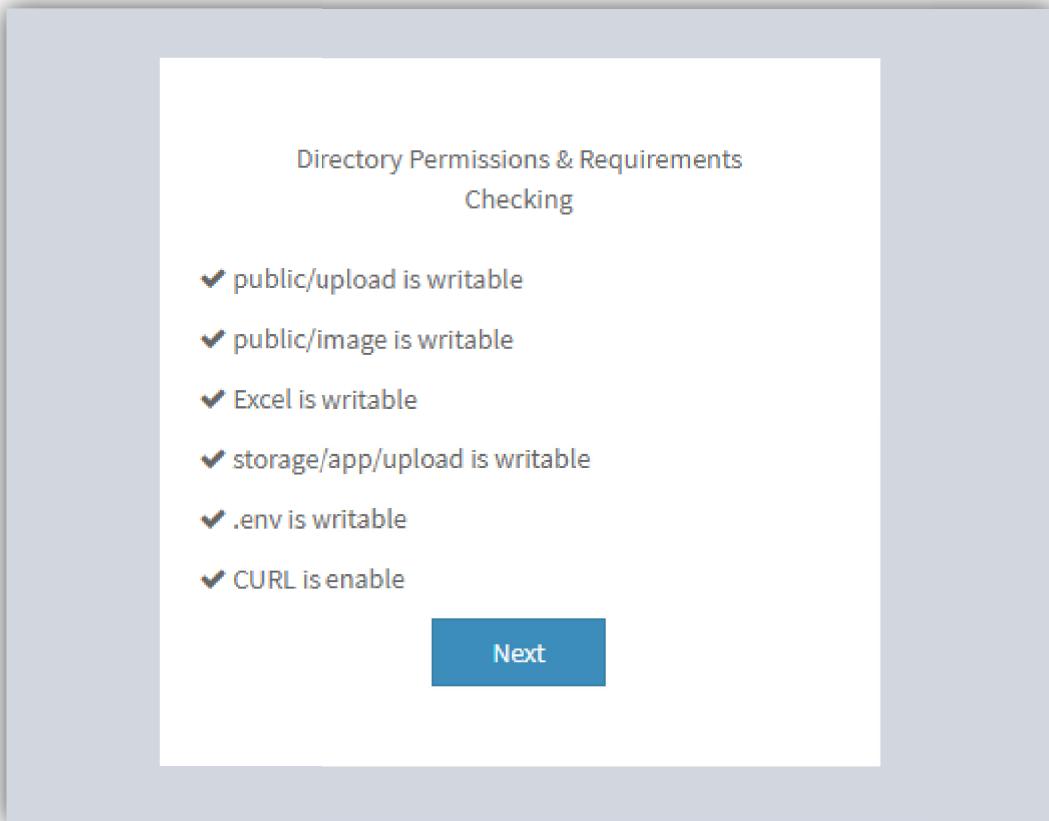


Fig-Checking Directory Permissions & Necessary Requirements

- 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

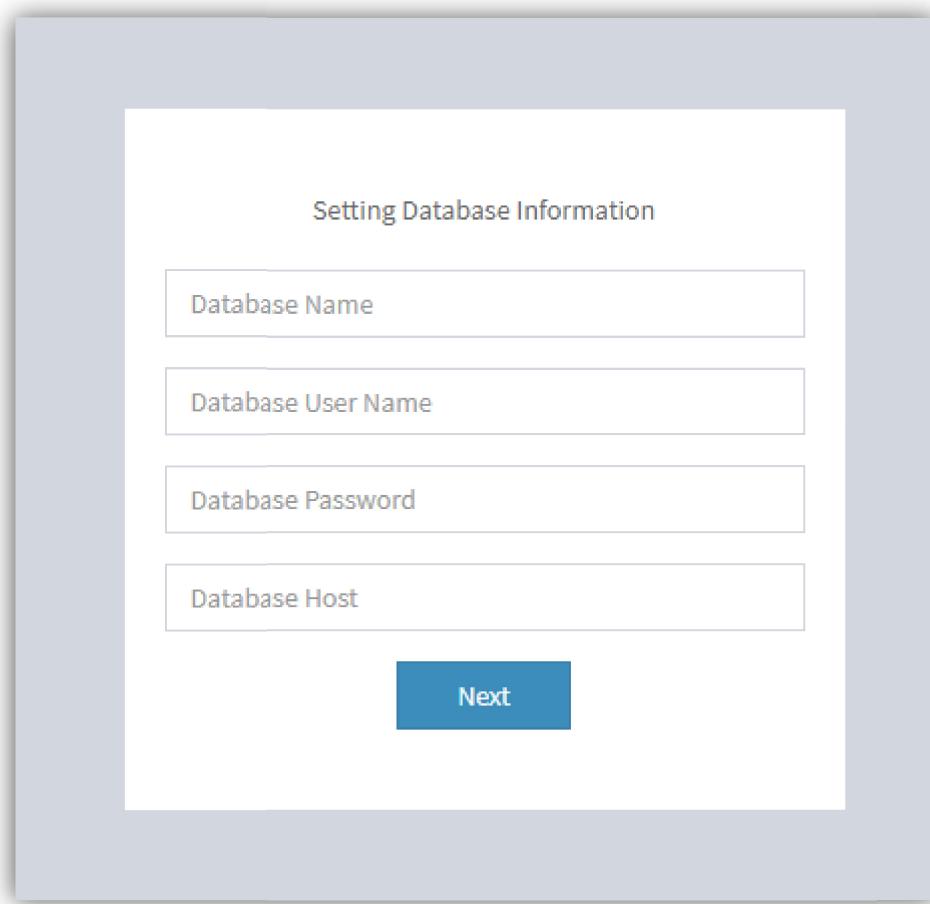


Fig- Setting Database Information

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

Register As Admin

Full Name

Email

Password

Retype password

Register

This image shows a registration form titled "Register As Admin". The form consists of four input fields and one action button. The first field is labeled "Full Name", the second is "Email", the third is "Password", and the fourth is "Retype password". All fields have a light gray background and a thin black border. Below these fields is a blue rectangular button with the word "Register" in white capital letters. The entire form is set against a white background with a soft shadow.

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.

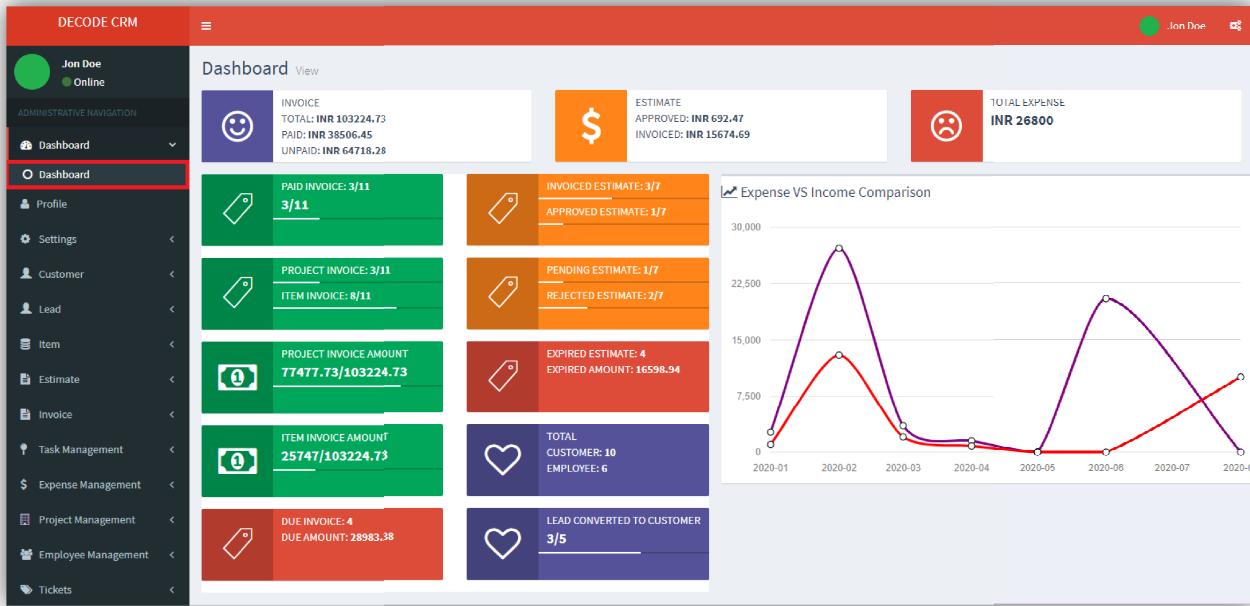


Fig 1 - Dashboard Details

## 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.

The screenshot shows the 'Customer Create' page in the DECODE CRM application. The left sidebar has a navigation menu with various modules like Dashboard, Profile, Settings, Customer, and Create Customer. The 'Create Customer' option is currently selected. The main form is titled 'Customer Create' and contains several input fields:

- Customer Basic Info:** Individual/Company Name\*, Enter Individual/Company Name
- Phone:** Enter Phone Number
- Email\***: Enter Email Address
- Website:** Enter Web Address
- Facebook Profile:** Enter Facebook Profile Address
- Instagram Profile:** Enter Customer Instagram Profile
- Twitter Profile:** Enter Customer Twitter Profile
- LinkedIn Profile:** Enter Customer LinkedIn Profile
- Photo/Logo:** Choose File [No file chosen]
- Vat No.:** Enter Vat No.
- Language\***: Please select language
- Individual/Company Address\***: Enter Individual/Company Address
- City\***: Enter Customer City
- State**: Enter Customer State
- Zip Code**: Enter Customer Zip Code
- Country\***: Please select customer country

A 'Crop Photo/Logo' section includes a 'Crop Image' button and a red crop tool over a placeholder image.

This screenshot shows the 'Customer Create' form with the 'Same As Individual/Company Address' checkbox checked for both Billing and Shipping addresses. The form is divided into two sections:

#### Billing Address\*

- Address\*: Enter Billing Address
- City\*: Enter Billing City
- State\*: Enter Billing State
- Zip Code\*: Enter Billing Zip Code
- Country\*: Please select billing country

#### Shipping Address\*

- Address\*: Enter Shipping Address
- City\*: Enter Shipping City
- State\*: Enter Shipping State
- Zip Code\*: Enter Shipping Zip Code
- Country\*: Please select shipping country

A blue 'Save' button is at the bottom.

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.

#	Customer Name	Customer Phone	Customer Email	Created By	Updated By	Actions
13	Customer One	0	customer_one@example.com	Jon Doe	Employee Four	
14	Customer Two	0	customer_two@example.com	Jon Doe	0	
15	Customer Three	12345678910	customer_three@example.com	Jon Doe	Jon Doe	
16	Customer Five	0	customer_five@example.com	Jon Doe	Jon Doe	
17	Customer Six	0	customer_six@example.com	Jon Doe	0	
18	Customer Seven	0	customer_seven@example.com	Jon Doe	0	
19	Customer Eight	0	customer_eight@example.com	Jon Doe	Customer Eight	
20	customer ten	0	customer_ten@example.com	Jon Doe	0	
21	customer thirteen	0	customer_thirteen@example.com	Jon Doe	0	
22	customer fourteen	01234567898	customer_fourteen@example.com	Employee One	0	

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.

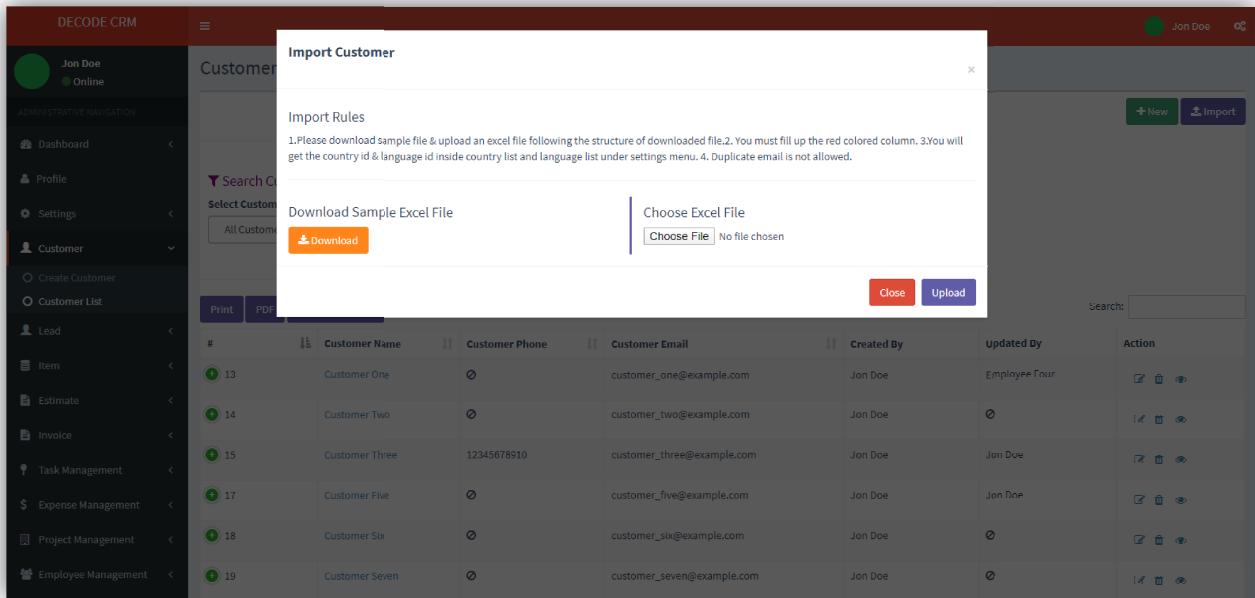


Fig 3.3 - Import Customer

### 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.

**Customer Profile**

**Customer One**

**Profile General Info** (selected)

**Customer Contact Information**

Member Of:	Default Branch
Email:	customer_one@example.com
Language:	Bangla
Country:	Bangladesh
City:	Dhaka
Address:	Some address

**Customer Shipping Address**

Country:	Bangladesh
City:	Dhaka
Address:	Some address

**Customer Billing Address**

Country:	Bangladesh
City:	Dhaka
Address:	Some address

**PAID INVOICE**  
37781.45/73596.35

**NUMBER OF UNPAID DUE INVOICE:** 1/6  
**UNPAID DUE INVOICE AMOUNT:** 490/73596.35

**NUMBER OF APPROVED ESTIMATE:**  
0/3

Fig 3.4 - Customer's General Details

**Customer Profile**

**Customer One**

**Statement** (selected)

**Select Date Range to Generate Statement**

01-01-2019 ~ 30-01-2020

**Print** **Download** **Email**

**Statement Of: 01-01-2019 ~ 30-01-2020**

Invoice No	Invoice Date	Due Date	Total Amount(INR)	Paid Amount(INR)	Due Amount(INR)
INV-00000006	20-01-2020	01-02-2020	14225.12	14225.12	0
INV-00000008	26-01-2020	06-02-2020	850	0	850
INV-00000012	04-01-2020	07-03-2020	30000	3000	27000
INV-00000017	04-01-2020	25-01-2020	550	60	490
			<b>INR45625.12</b>	<b>INR17285.12</b>	<b>INR28340</b>

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.

The screenshot shows the DECODE CRM application's 'Create Lead' page. The left sidebar features a dark theme with white icons and text. The 'Lead' menu item is selected and highlighted with a red box. The main content area is titled 'Lead Create'. It contains several input fields grouped into sections: 'Lead Basic Info' (Lead Title\*, Lead Source\*, Lead Status\*), 'Contact Person' (Person Name\*, Email\*, Phone), 'Contact Address' (Full Address, City, State, Zip Code, Country), and 'Lead Note\*' (Text area). A 'Save' button is located at the bottom right of the form.

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.

#	Lead Title	Source	Assigned To	Status	Follow Up Date	Contact Person	Person Email	Action
1 2	Lead Two	google plus	Employee One	Customer	Ø	customer ten	customer_ten@example.com	<span>Converted</span>
+ 4	Lead four	Linked in	Employee Two	New Lead	29-01-2020	customer twelve	customer_twelve@example.com	<span>Convert</span>
1 5	Lead five	friend	Employee Two	Customer	28-01-2020	customer thirteen	customer_thirteen@example.com	<span>Converted</span>
1 6	Lead six	twitter	Employee One	Customer	27-02-2020	customer fourteen	customer_fourteen@example.com	<span>Converted</span>
1 8	yuiyu	uyiyu	Employee Four	New Lead	29-01-2020	uyiyu	yuiyu@example.com	<span>Convert</span>

Fig 4.2 - Lead List

## 5. Item

User can manage (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.

The screenshot shows the DECODE CRM application. On the left, there's a dark sidebar with user information ('Jon Doe, Online') and a navigation menu. The 'Item' menu item is expanded, and its sub-item 'Create Product' is highlighted with a red box. The main content area is titled 'Product Add' and contains several input fields:

- Product Basic Info:** Fields for 'Product Name\*' (with placeholder 'Enter Product Name') and 'Product Description' (with placeholder 'Enter Product Description').
- Unit Buying Price\***: A field with 'INR' and a placeholder 'Enter Buying Price'.
- Unit Selling Price\***: A field with 'INR' and a placeholder 'Enter Product Selling Price'.
- Unit Of Measurement\***: A dropdown menu with the placeholder 'Please select an uom'.
- Product Status\***: A dropdown menu with the placeholder 'Please select product status'.

A blue 'Save' button is located at the bottom right of the form.

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.

#	Product Name	Buying Price (INR)	Selling Price (INR)	Unit Of Measurement	Product Status	Created By	Updated By	Edit	Action	Delete
1	Product one	400	550	Kilogram	Active	Jon Doe	Jon Doe			
2	Product Two	350	400	Liter	In Active	Jon Doe	Jon Doe			
3	Product Three	650	700	Kilogram	Damaged	Jon Doe	Jon Doe			
4	Product Four	150	230	Kilogram	Active	Jon Doe	Ø			
5	Product Five	600	650	Kilogram	Active	Jon Doe	Jon Doe			

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.

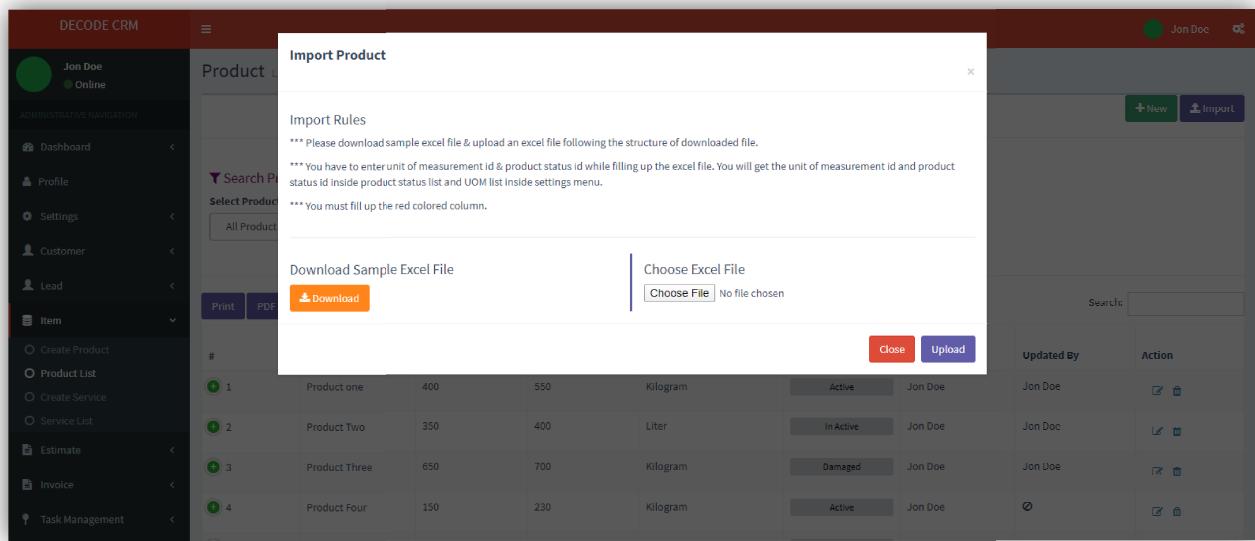


Fig 5.3 - Import Product

## 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.

The screenshot shows the DECODE CRM interface. On the left, there's a dark sidebar with a user profile for 'Jon Doe' and an 'Online' status. Below the profile, the 'ADMINISTRATIVE NAVIGATION' menu is open, showing options like Dashboard, Profile, Settings, Customer, Lead, Item, Create Product, Product List, and Create Service. The 'Create Service' option is highlighted with a red box. The main content area is titled 'Service Add' under 'Service Basic Info'. It contains three input fields: 'Service Name\*' (placeholder: Enter Service Name), 'Rate\*' (placeholder: INR Rate), and 'Unit Of Measurement\*' (placeholder: Please select an uom). A 'Save' button is located at the bottom right of the form area.

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

#	Service Name	Service Rate (INR)	Unit Of Measurement	Created By	Updated By	Action	Delete
6	Service Two	300	Per Day	Jon Doe	Ø	<a href="#">Edit</a>	<a href="#">Delete</a>
7	Show Hidden Column	30	Per Hour	Jon Doe	Ø	<a href="#">Edit</a>	<a href="#">Delete</a>
10	Service One	60	Per Hour	Jon Doe	Jon Doe	<a href="#">Edit</a>	<a href="#">Delete</a>

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.

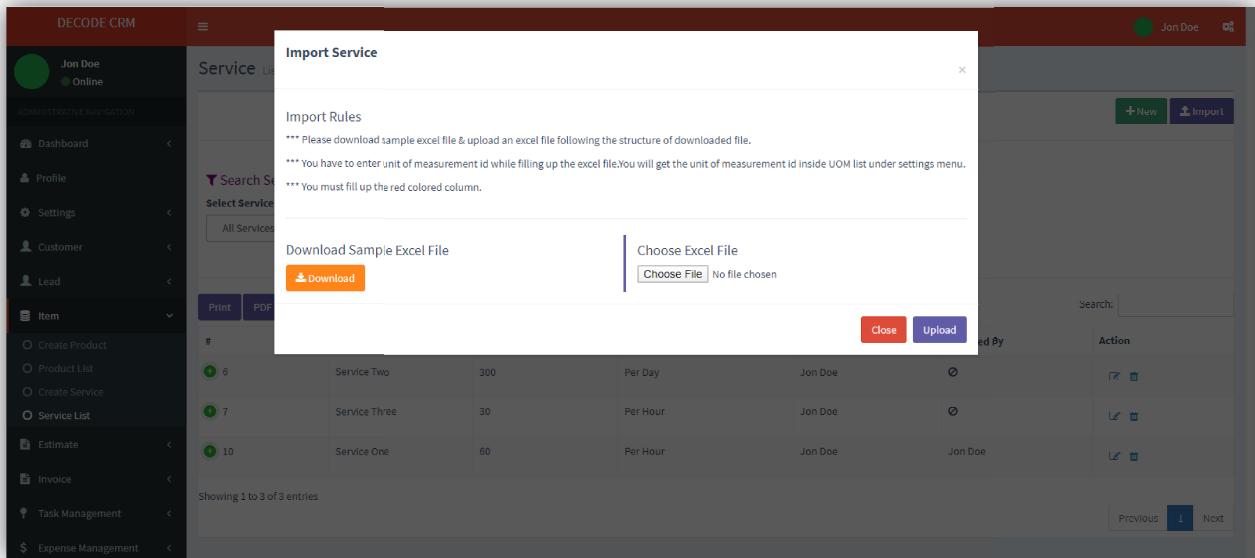


Fig 5.6 - Import Service

## 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.

The screenshot displays the 'Create Estimate' page within the DECODE CRM application. The left sidebar features a dark theme with white icons and text, listing various administrative modules like Dashboard, Profile, Settings, Customer, Lead, Item, Estimate, Create Estimate, Estimate List, Invoice, Task Management, Expense Management, Project Management, and Employee Management. The 'Create Estimate' option is highlighted with a red box. The main content area is titled 'Estimate Create' and contains several input fields and sections. In the 'Estimate Basic Info' section, there are fields for 'Estimate Number' (EST-00000012), 'Estimate Date', 'Expiry Date', 'Status' (set to 'Approved'), and a 'Note' area. Below this is a section to 'Add Item(Product/Service)\*' with a dropdown menu set to 'Product one' and a green '+ Add Item' button. The 'Other Information' section includes a 'Shipping Charge' field (set to INR) and a summary table with columns for Sub Total, Shipping Charge, and Total, all showing INR 0.00. At the bottom right, there's a 'Save' button and a link to 'Activate Windows'.

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.

Estimate No	Customer Name	Estimate Date	Expiry Date	Shipping Charge (INR)	Total (INR)	Status	Action
EST-00000003	Customer One	20-01-2020	01-02-2020	14.82	14225.12	Invoiced	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">View</a>
EST-00000005	Customer One	20-01-2020	01-02-2020	14.25	924.25	Rejected	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">View</a>
EST-00000006	Customer Two	20-02-2020	07-03-2020	0	850	Pending	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">View</a>
EST-00000007	Customer Two	05-02-2020	07-03-2020	14.29	1089.58	Rejected	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">View</a>
EST-00000008	Customer Two	19-03-2020	28-03-2020	15.23	692.47	Approved	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">View</a>
EST-00000009	Customer One	04-01-2020	01-02-2020	0	550	Invoiced	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">View</a>
EST-00000011	Customer Five	03-01-2020	01-02-2020	29.69	859.57	Invoiced	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">View</a>

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.

Estimate Details

From: Decode CRM  
Some address

Shipping To: Customer Two  
Some address

Billing To: Conference Two  
Some address

#	Item Name	Qty	Rate	Total(INR)
1	Name: Product Five UOM: Kilogram Discount: 0% No Tax: 0% Description:	1	650	650
2	Name: Service Three UOM: Per Hour Discount: 10.28% No Tax: 0% Description:	1	50.37	50.37

**Summary**

Subtotal:	INR 677.21
Shipping:	INR 15.73
Total:	INR 692.47

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.

The screenshot displays the DECODE CRM application's 'Create Invoice' screen. On the left, a dark sidebar lists various administrative navigation items like Dashboard, Profile, Settings, Customer, Lead, Item, Estimate, and Invoice. The 'Invoice' menu is expanded, and the 'Create Invoice' option is selected, both highlighted with a red box. The main content area is titled 'Invoice Create' under 'Invoice Basic Info'. It includes fields for 'Invoice Number' (set to INV-0000021), 'Invoice Date', 'Status' (set to 'Unpaid'), 'Select Customer' (set to 'Nobody'), 'Due Date', and a 'Note' section. Below this is a green header 'Select product/service to add item'. An 'Add Item' section contains a dropdown labeled 'Select an Item' and a green 'Add Item' button. At the bottom, there's an 'Other Information' section with a 'Shipping Charge' field (set to INR) and a summary table on the right showing Sub Total, Shipping Charge, and Total values. A blue 'Save' button is located at the bottom center.

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

Invoice No	Customer Name	Invoice Date	Due Date	Shipping Charge (INR)	Total (INR)	Total Paid (INR)	Total Unpaid (INR)	Status	Action
INV-00000007	Customer One	14-02-2020	07-03-2020	73.78	7504.9	30	7474.9	Partially Paid	
INV-00000010	Customer Three	22-04-2020	02-05-2020	0	680	30	650	Partially Paid	
INV-00000011	Customer One	04-01-2020	07-03-2020	0	30000	3000	27000	Partially Paid	
INV-00000017	Customer One	04-01-2020	25-01-2020	0	550	60	490	Partially Paid	
INV-00000020	Customer Six	02-01-2020	08-02-2020	13.59	646.98	15	631.98	Partially Paid	
					Total: INR 39381.88	Paid: INR 3135.00	Unpaid: INR 36246.88		

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.

The screenshot shows the 'Project Invoice Details' page. On the left is a dark sidebar with 'ADMINISTRATIVE NAVIGATION' and various menu items like Dashboard, Profile, Settings, Customer, Lead, Item, Estimate, and Invoice (which is selected). The main content area has a header 'Project Invoice Details' with tabs for Invoice, Payment, and Payment List. Below this are three buttons: Print, Download, and Email. The central part displays an invoice for 'Decode CRM' with a logo. It shows the From address as 'Decode CRM Some address' and the Shipping To address as 'Customer One Some address'. The Billing To address is also 'Customer One Some address'. The invoice summary table includes rows for Subtotal (INR 30000), Discount (INR 0), Tax (INR 0), Total (INR 30000), Total Paid (INR 3000), and Total Due (INR 27000). At the bottom, there's a 'Terms & Conditions' section with a note about Lorem Ipsum, and fields for Sender Signature and Receiver Signature.

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.

Payment No	Invoice No	Payment Date	Payment Method	Amount
PAY-00000010	INV-00000012	04-01-2020	Stripe	1500
PAY-00000011	INV-00000012	25-03-2020	Paypal	1500

Total: INR 3000.00

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.

The screenshot shows the 'Payment Details' page in the Decode CRM application. The left sidebar has a dark theme with white text and icons. The 'Invoice' section is currently selected. The main content area has a light background with blue header bars for 'Payment Summary' and 'Invoice Summary'. The 'Payment Summary' section contains fields like 'Received Amount: INR1500', 'Payment Date: 04-01-2020', and 'Payment Method: Stripe'. The 'Invoice Summary' section contains fields like 'Invoice No: INV-00000012', 'Total Amount: INR30000', 'Total Paid: INR3000', 'Total Due: INR27000', and 'Due Date: 07-03-2020'. At the bottom, there are 'Sender Signature' and 'Receiver Signature' fields.

**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.

### 8.1 Create 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

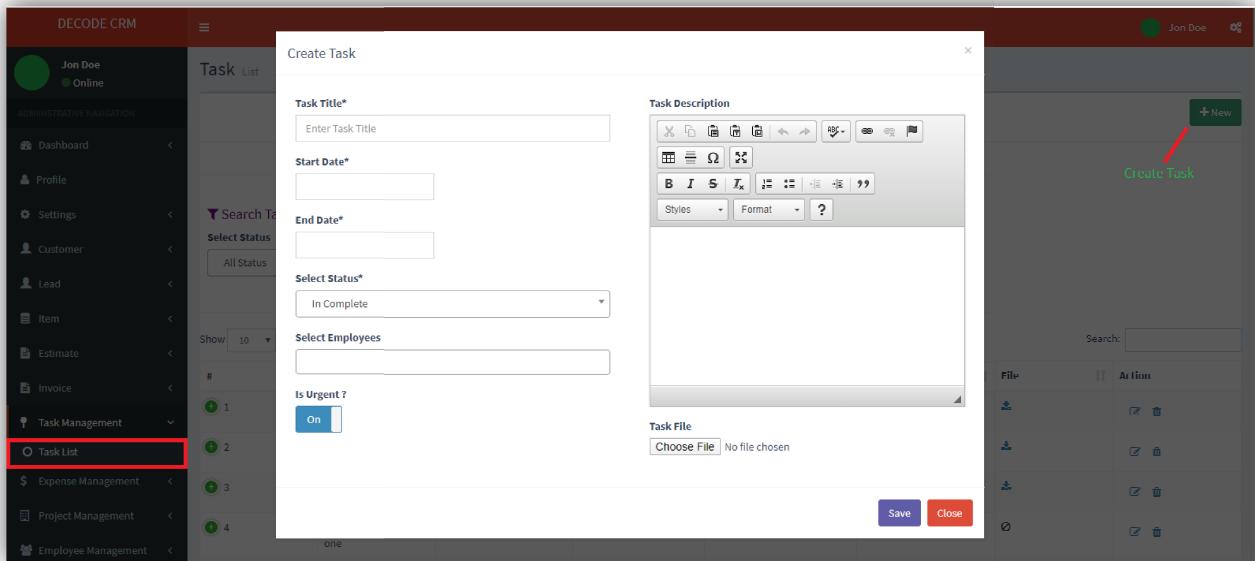


Fig 8.1 - Create Task

## 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.

#	Task Title	Starting Date	Ending Date	Status	Urgency Label	Download	Edit	Delete
1	Task One	29-12-2019	29-02-2020	In Complete	●	<a href="#">Download</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
2	Task two	22-01-2020	28-03-2020	Complete	●	<a href="#">Download</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
3	Task three	04-01-2020	25-04-2020	Test Task Status	●	<a href="#">Download</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
4	Task one for project one	18-01-2020	22-02-2020	In Complete	●	<a href="#">Download</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
5	Task two for project one	11-01-2020	08-02-2020	Test Task Status	●	<a href="#">Download</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
6	Task-four	04-01-2020	18-01-2020	Complete	●	<a href="#">Download</a>	<a href="#">Edit</a>	<a href="#">Delete</a>

Showing 1 to 6 of 6 entries

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

## 9.2 Expense 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.

#	Expense Title	Expense Type	Expense Date	Amount(INR)	Receipt	Action
1	Expense One	House Rent	22-01-2020	1000		
2	Expense Two	Electricity Bill	22-02-2020	13000		
3	Expense three	House Rent	17-03-2020	2000		
4	Expense Four	Electricity Bill	11-04-2020	800		
5	Expense Five	House Rent	15-05-2020	10000		

Total: INR 26800.00

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 \*).

The screenshot shows the DECODE CRM application. On the left, there's a dark sidebar with various administrative navigation items like Dashboard, Profile, Settings, Customer, Lead, Item, Estimate, Invoice, Task Management, Expense Management, and Project Management. Under Project Management, there are two options: 'Create Project' and 'Project List'. The 'Create Project' option is highlighted with a red box. The main content area is titled 'Project Create' and contains a 'Project Basic Info' section. It includes fields for 'Project Name\*' (with placeholder 'Project Name'), 'Project cost\*(INR)' (placeholder 'Enter project cost'), 'Start Date\*' (placeholder 'Start Date'), 'End Date\*' (placeholder 'End Date'), 'Select Customer(Individual/Company Name)' (placeholder 'Please select a customer'), 'Select Employee' (placeholder 'Select Employee'), 'Select project status\*' (placeholder 'Please select a status'), and 'Project Description' (placeholder 'Choose File' with 'No file chosen'). At the bottom right of the form is a blue 'Save' button.

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.

#	Project Name	Starting Date	Ending Date	Project Cost	Customer	Status
PRO-00000001	Project One	04-01-2020	08-02-2020	30000	Customer One	In Complete
PRO-00000002	Project Two	04-01-2020	08-02-2020	10000	Customer One	Partially complete
PRO-00000003	Project Three	14-01-2020	31-01-2020	15000	Customer Two	In Complete

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.

The screenshot shows the DECODE CRM interface. On the left is a sidebar with navigation links like Dashboard, Profile, Settings, Customer, Lead, Item, Estimate, Invoice, Task Management, Expense Management, Project Management (selected), Create Project, Project List, and Employee Management. The main area is titled 'Project Details' under 'General'. It shows a project named 'Project One'. Below the title are sections for 'Project Basic Information', 'Assigned To Employee', and 'Project Progress'. The 'Project Basic Information' section contains fields for Demo URL (cvbn), Starting Date (04-01-2020), Ending Date (08-02-2020), Status (In Complete), Project Cost (INR30000), and Primarily Created For (Customer One). The 'Assigned To Employee' section lists 'Jon Doe', 'Employee One', and 'Employee Two'. The 'Project Progress' section shows 'COMPLETED TASK-0/0' and 'FIXED BUG-0/1'. A red box highlights the 'General' tab in the top navigation bar, and another red box highlights the 'Project Basic Information' section. A green arrow points to the 'Download description' link at the bottom of the page.

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.

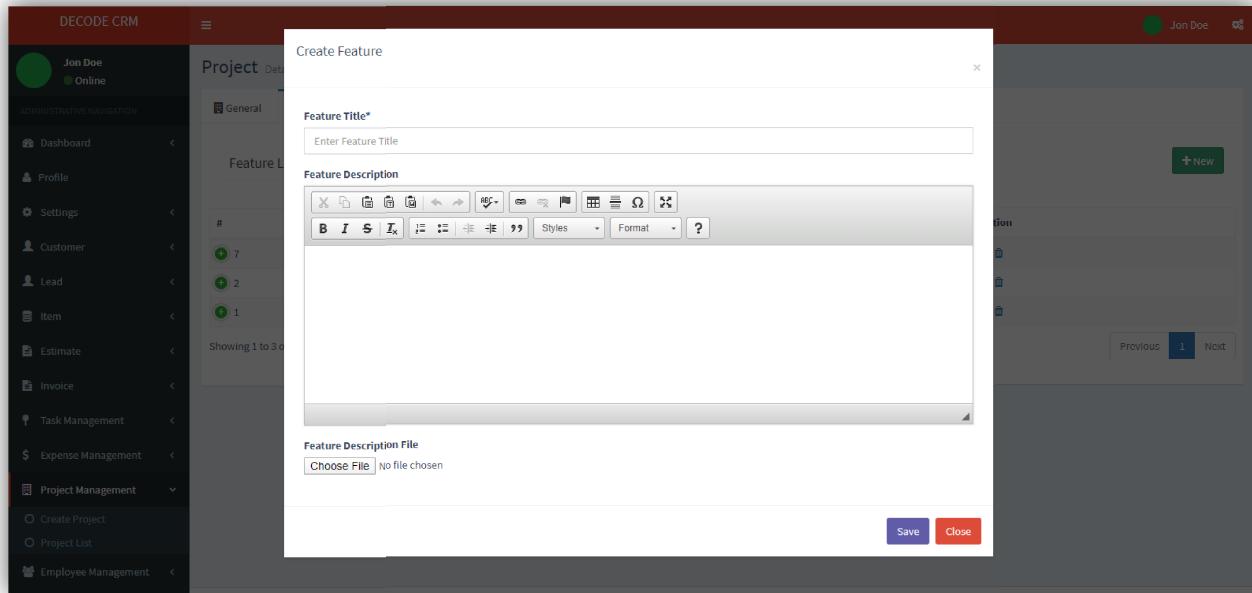


Fig 10.4 - Create Project Feature

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

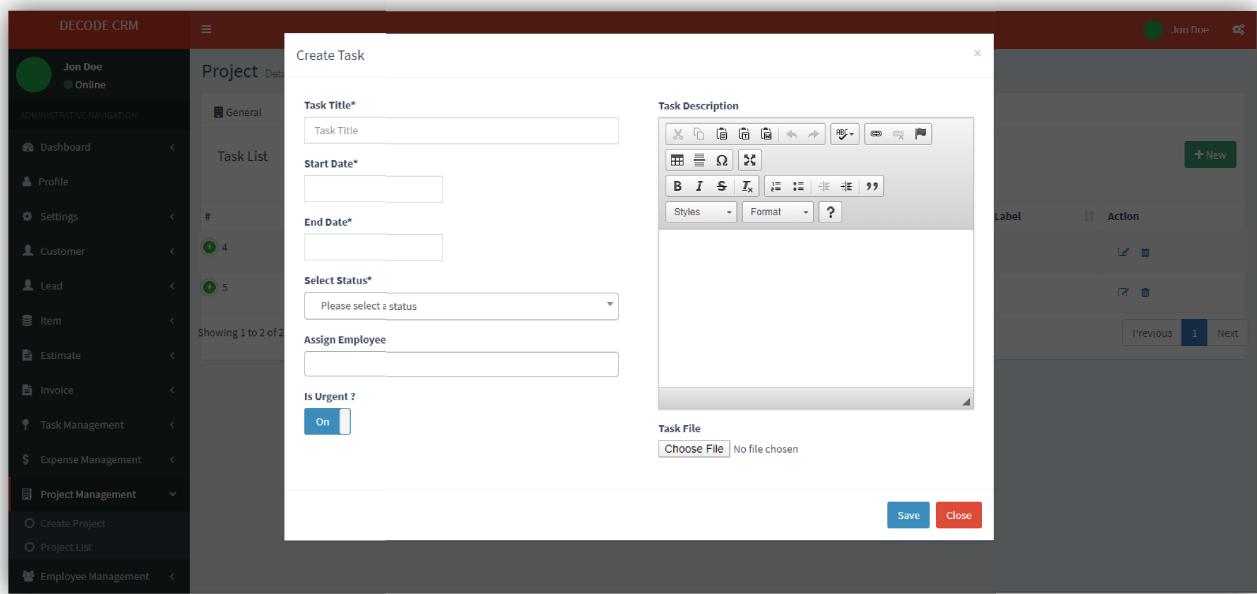


Fig 10.6 - Create Project Task

The screenshot shows the 'Project Details' page with the 'Tasks' tab selected. The 'Task List' table displays two tasks:

#	Task Title	Starting Date	Ending Date	Status	Urgency Label	Action
4	Task one for project one	18-01-2020	22-02-2020	In Complete	●	<a href="#">Edit</a> <a href="#">Action</a> <a href="#">Delete</a>
5	Task two for project one	11-01-2020	08-02-2020	Test Task Status	●	<a href="#">Edit</a> <a href="#">Action</a> <a href="#">Delete</a>

Annotations include: a red box around the 'Tasks' tab, a green arrow pointing to the 'Edit' button of the first task, a red arrow pointing to the 'Delete' button of the second task, and a green box highlighting the 'Create Task' button in the top right of the table header.

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.

The screenshot shows the 'Report Bugs' dialog box within the DECODE CRM interface. The dialog has a title 'Report Bugs'. It contains several input fields and a rich text editor for the bug description. The fields include:

- Bug Title\***: A text input field with placeholder 'Enter Bug Title'.
- Assign Employee**: A dropdown menu.
- Select Status\***: A dropdown menu with placeholder 'Please select a status'.
- Is Urgent?**: A button labeled 'On'.
- Bug File**: A file input field with placeholder 'Choose File' and message 'No file chosen'.

Below the form is a rich text editor toolbar. At the bottom right of the dialog are 'Save' and 'Close' buttons.

Fig 10.8 - Report Bug

The screenshot shows the 'Project Details' page with the 'Bugs List' tab selected. The top navigation bar includes a 'Report Bugs' button, which is highlighted with a red box. The main content area displays a table of bugs with the following columns:

#	Bug Title	Status	Urgency Label	File	Action
1	Bug one for project one	Unfixed	●		<a href="#">Edit</a> <a href="#">Report Bug</a> <a href="#">Delete</a>

Annotations on the screenshot include:

- A green arrow points from the text 'Show Hidden Column' to the 'File' column header.
- Two green arrows point from the 'Edit' and 'Delete' links to their corresponding icons in the 'Action' column.
- Red arrows point from the 'Report Bug' and 'Delete' links to their respective icons in the 'Action' column.

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

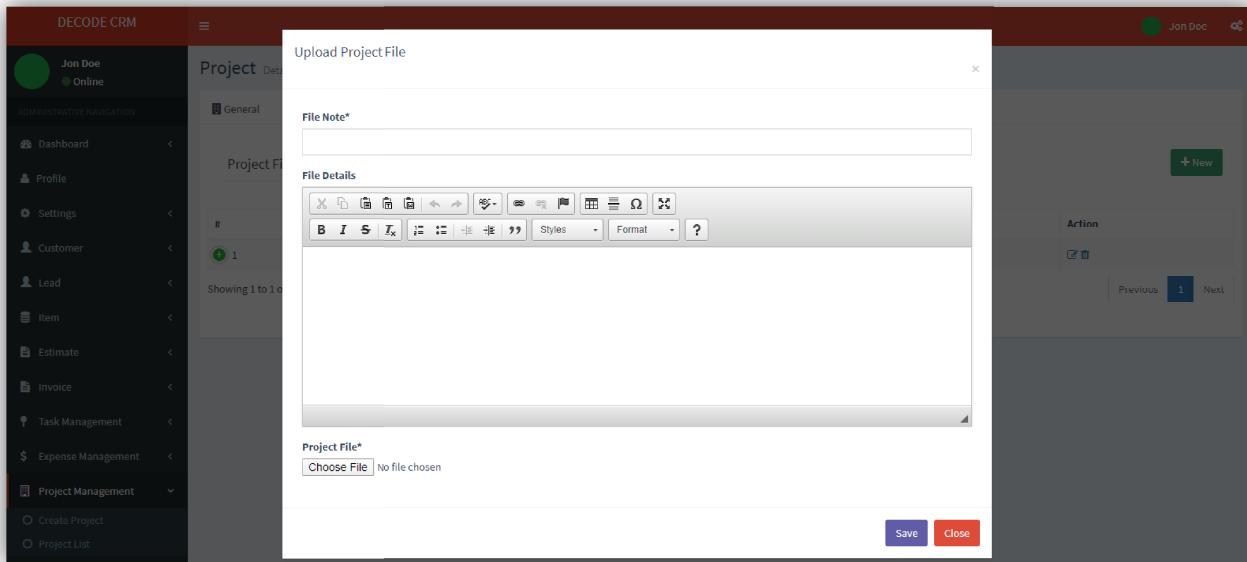


Fig 10.10 - Create Project File

The screenshot shows the DECODE CRM interface. On the left is a dark sidebar with navigation links for various modules like Dashboard, Profile, Settings, Customer, Lead, Item, Estimate, Invoice, Task Management, Expense Management, and Project Management. The Project Management section is expanded, showing 'Create Project' and 'Project List'. The main content area has a red header bar with tabs: General, Features, Tasks, Report Bugs, Project Files (which is highlighted with a red box), Invoices, Project Payment, and a blue button for 'Create Project Invoice To Sell'. Below this is a table titled 'Project File List' with columns: #, File Note, File, Created By, Updated By, Edit, Action, and Delete. One row is visible, showing entry #1 with note 'File one for project one', file link, created by 'Jon Doe', updated by 'Jon Doe', and edit, action, and delete buttons. Red arrows highlight the 'Edit' and 'Delete' buttons. At the bottom of the table, there's a 'Show Hidden Column' link and a navigation bar with 'Previous', a page number '1', and 'Next'.

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 \*).

**Project Create Invoice**

**Invoice Basic Info**

**Project Title:** Project One

**Customer (Individual/Company Name)\*:** Customer One

**Invoice Date\*:** [Date Input]

**Status\*:** Unpaid

**Note:** Enter Invoice Note

**Other Information**

**Project Price\*:** INR 30000

**Discount On Total (Fixed Amount):** INR [Enter Fixed Discount Amount]

**Select Tax Type (%)\*:** No Tax (0%)

**Summary**

Sub Total	Discount	Tax Charge	Total
INR 30000.00	INR 0.00	INR 0.00	INR 30000.00

**Save & Send**

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**

**Project Details**

**Invoices**

**Filter Project List**

Invoice No	Customer Name	Invoice Date	Due Date	Total Tax (%)	Total (INR)	Total Paid (INR)	Total Unpaid (INR)	Status	Action
INV-00000012	Customer One	04-01-2020	07-03-2020	0	30000	3000	27000	Partially Paid	
INV-00000013	Customer Two	26-01-2020	08-02-2020	3.89	27011.4	0	27011.4	Unpaid	
INV-00000015	Customer One	15-04-2020	18-04-2020	3.89	20466.33	20466.33	0	Paid	

Total: INR 77477.73 Paid: INR 23466.33 Unpaid: INR 54011.40

Show Hidden Column

Showing 1 to 3 of 3 entries

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

Payment No	Invoice Id	Customer Name	Payment Date	Payment Method	Amount (INR)	Action
PAY-00000010	INV-00000012	Customer One	04-01-2020	Stripe	1500	<span>View</span> <span>Delete</span>
PAY-00000011	INV-00000012	Customer One	25-03-2020	Paypal	1500	<span>View</span> <span>Delete</span>
PAY-00000013	INV-00000015	Customer One	27-06-2020	Cash	20466.33	<span>View</span> <span>Delete</span>

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"

The screenshot shows the DECODE CRM interface. The top navigation bar includes a user profile for 'Jon Doe' (Online) and standard CRM icons. The left sidebar, titled 'ADMINISTRATIVE NAVIGATION', lists various modules: Dashboard, Profile, Settings, Customer, Lead, Item, Estimate, Invoice, Task Management, Expense Management, Project Management, and Employee Management. Under 'Employee Management', the 'Create Employee' option is selected and highlighted with a red box. The main content area is titled 'Employee Create' and contains a form for 'Employee Basic Info'. Fields include Employee Name\*, Nationality\*, Gender\*, Birth Date\*, Marital Status\*, Facebook Profile, Instagram Profile, Twitter Profile, and LinkedIn Profile. An 'Employee Photo' field is present, featuring a placeholder image and a 'Choose File' button. A crop tool is overlaid on this field, with a large gray rectangle covering the photo area and a smaller white rectangle inside it. A green text overlay says 'Move cursor to crop image'. The top right corner of the main window shows the user 'Jon Doe' and some system icons.

Contact Information\*

Email\*  
Enter Email

Phone\*  
Enter Phone

City\*  
Enter City

State  
Enter State

Zip Code  
Enter Zip Code

Country\*  
Please select a country

Address\*

Employment Information\*

Joining Date\*  
Select Date

Job Status\*  
Please select a status

Designation\*  
Please select a designation under a department

Employee's Resume  
Choose File No file chosen

Contract & Agreement Details  
Choose File No file chosen

Save

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.

#	Employee Name	Employee Phone	Employee Email	Job Status	Joining Date	Department	Designation	Action
17	Jon Doe	01253698745	admin@example.com	Permanent	31-12-2018	CSE	Associate Professor	
18	Employee One	01253698745	employee_one@example.com	Contractual	09-12-2019	MSE	Assistant Professor	
19	Employee Two	01253698745	employee_two@example.com	Contractual	13-08-2019	MSE	Senior Lecturer	
21	Employee Three	01452369874	employee_3@example.com	Permanent	01-01-2020	MSE	Assistant Professor	
22	Employee Four	15877862126366	employee_4@example.com	Permanent	29-12-2019	CSE	Associate Professor	
23	Employee Five	02365897	employee_5@example.com	Permanent	05-01-2020	CSE	Lecturer	

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

### 12.1 Create 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

## 12.2 Ticket 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.

#	Ticket Title	Customer Name	Assigned Employee	Ticket File	Created By	Updated By	Status	Action
1	Ticket One	Customer One	Employee One		Jon Doe	Employee One	Resolved	
2	Ticket two	Customer One	Employee Four		Jon Doe	Employee Four	On Resolving Process	
3	Ticket Three	Customer Two	Employee Two		Jon Doe	Employee One	Resolved	
4	Ticket Four	Customer Two	Employee Two		Jon Doe	Employee Four	On Resolving Process	

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.

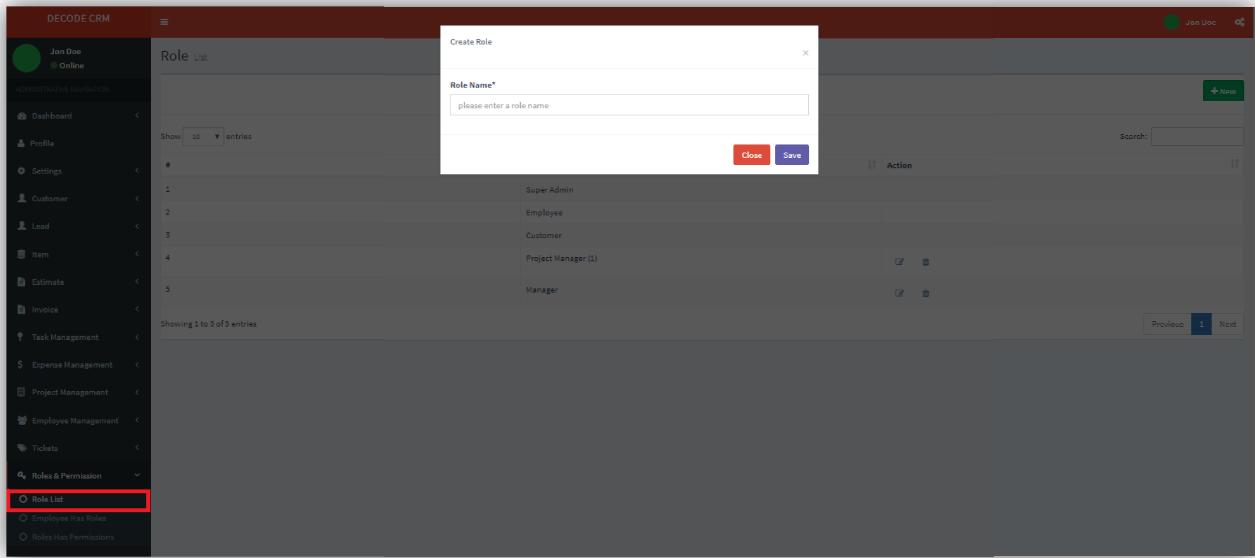


Fig 13.1 - Create Role

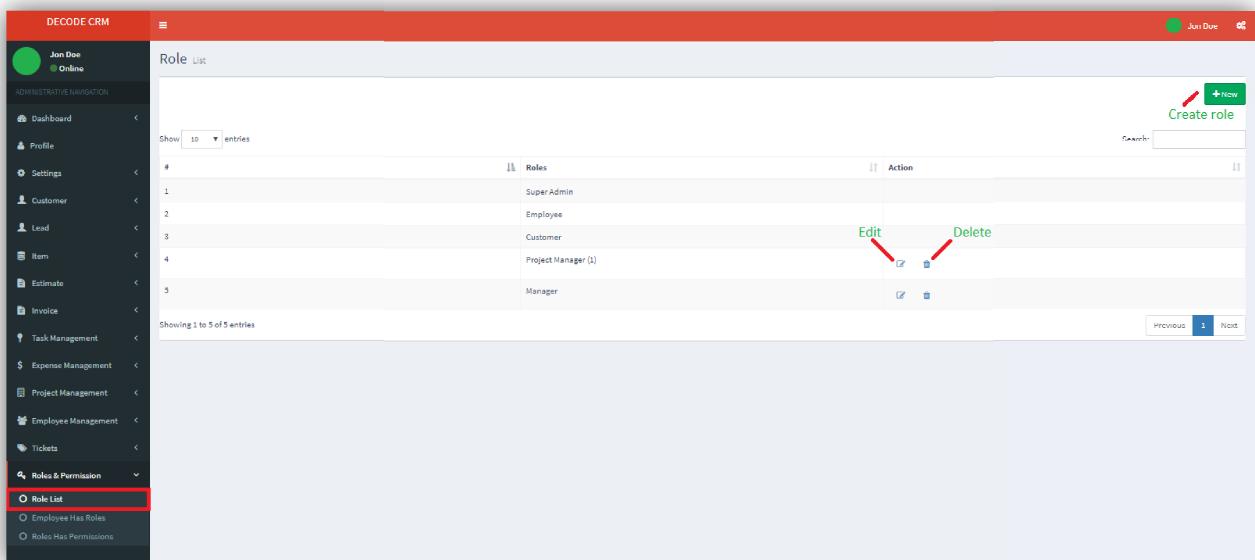


Fig 13.2 - Role List

## 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.

#	Employee Name	Assigned Roles	Action
1	Jon Doe	Employee X Super Admin X	+ Assign role to Employee
2	Employee One	Employee X	+
3	Employee Two	Employee X	+
4	Employee Three	Employee X	+
5	Employee Four	Employee X Manager X	+
6	Employee Five	Employee X	+

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.

<b>Component</b>	<b>Permissions</b>	<b>Permission's Description</b>
	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

<b>Component</b>	<b>Permissions</b>	<b>Permission's Description</b>
	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

<b>Component</b>	<b>Permissions</b>	<b>Permission's Description</b>
	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

<b>Component</b>	<b>Permissions</b>	<b>Permission's Description</b>
	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

<b>Component</b>	<b>Permissions</b>	<b>Permission's Description</b>
	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

<b>Component</b>	<b>Permissions</b>	<b>Permission's Description</b>
	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

<b>Component</b>	<b>Permissions</b>	<b>Permission's Description</b>
	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

<b>Component</b>	<b>Permissions</b>	<b>Permission's Description</b>
	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

<b>Component</b>	<b>Permissions</b>	<b>Permission's Description</b>
	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

<b>Component</b>	<b>Permissions</b>	<b>Permission's Description</b>
	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

<b>Component</b>	<b>Permissions</b>	<b>Permission's Description</b>
	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

<b>Component</b>	<b>Permissions</b>	<b>Permission's Description</b>
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

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

<b>Component</b>	<b>Permissions</b>	<b>Permission's Description</b>
	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 \*).

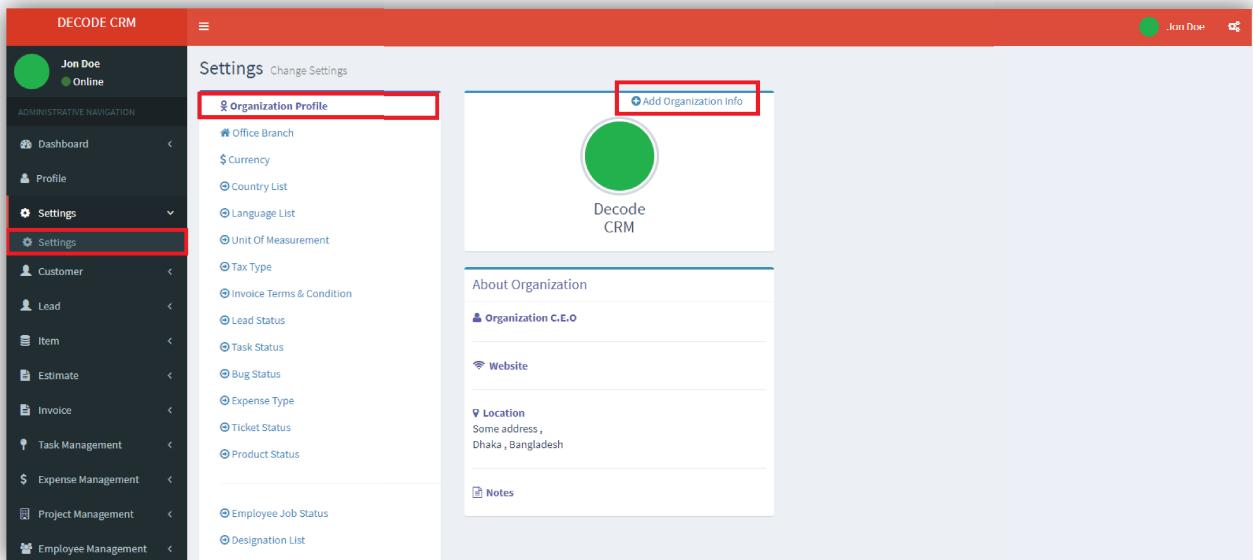


Fig 14.1 - Organization Profile

The screenshot shows the 'Edit Profile' form for the organization. The left sidebar is identical to Fig 14.1. The main content area has a red header bar with the text 'Organization Edit Profile'. Below this, the 'Organization Profile' section is displayed again. The 'Organization Name\*' field contains 'Decode CRM'. The 'Website' field is empty. The 'Organization C.E.O.' field is empty. The 'Organization Email\*' field contains 'admin@example.com'. The 'Organization Address\*' field contains 'Some address'. The 'City\*' field contains 'Dhaka'. The 'State' field is empty. The 'Zip Code' field is empty. The 'Country\*' field contains 'Bangladesh'. To the right of the form, there is a large green rectangular placeholder for an organization logo. At the bottom right of the form, there is a purple 'Save' button. A watermark at the bottom right of the form area says 'Activate Windows Go to Settings to activate Windows.'

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.

Currency No	Currency Name	Currency Code	Default Currency	Action
1	Taka	TAKA	Off	<span>Action</span>
2	Euro	EUR	Off	<span>Action</span>
3	USD	USD	Off	<span>Action</span>
5	Rupi	INR	On	<span>Action</span>

Fig 14.3 - Currency List

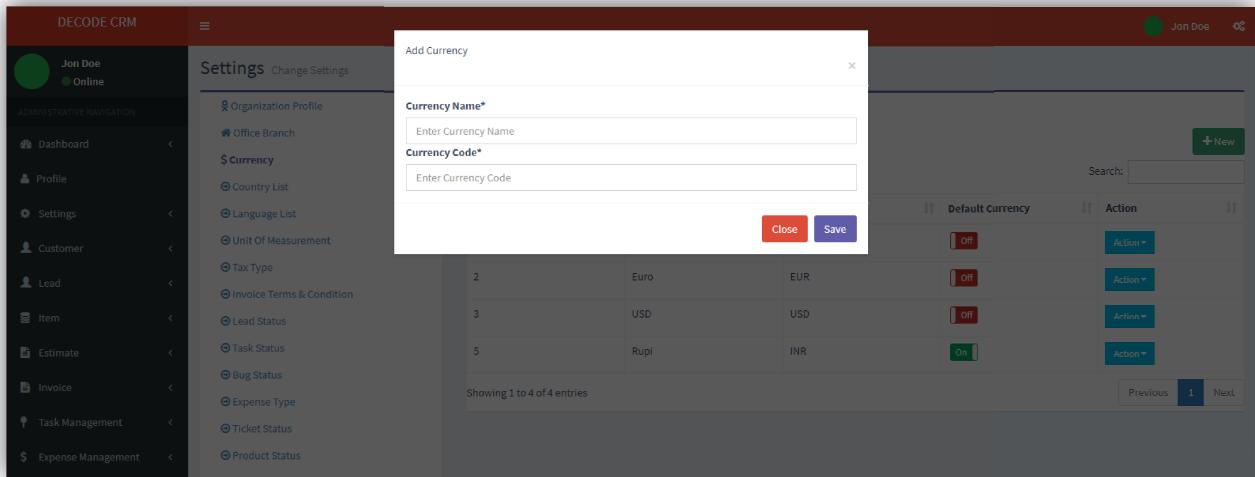


Fig 14.4 - Create Currency

### 14.3Country List

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

ID	Country Name
1	Afghanistan
2	Albania
3	Algeria
4	American Samoa
5	Andorra
6	Angola
7	Anguilla
8	Antarctica
9	Antigua And Barbuda
10	Argentina

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

The screenshot shows the DECODE CRM application interface. On the left, there is a dark sidebar with various navigation options like Dashboard, Profile, Settings, Customer, Lead, Item, Estimate, Invoice, Task Management, Expense Management, Project Management, and Employee Management. The 'Settings' option is highlighted with a red box. In the center, under 'Settings', there is a sub-menu with 'Language List' also highlighted with a red box. To the right, the main content area displays a table titled 'Language List'. The table has columns for 'Id', 'Language Name', and 'Action'. There are four entries: 1. Bangla, 2. English, 3. Hindi, and 4. Urdu. Each entry in the 'Action' column has a blue 'Action' button with a dropdown arrow. At the top right of the table area, there is a green button labeled 'Create Language' with a red arrow pointing to it. Above the table, there is a search bar and a 'Show' dropdown set to '10 entries'. At the bottom right of the table, there are 'Previous' and 'Next' buttons.

Language List		
Id	Language Name	Action
1	Bangla	Action
2	English	Action
3	Hindi	Action
4	Urdu	Action

Fig 14.6 - Language List

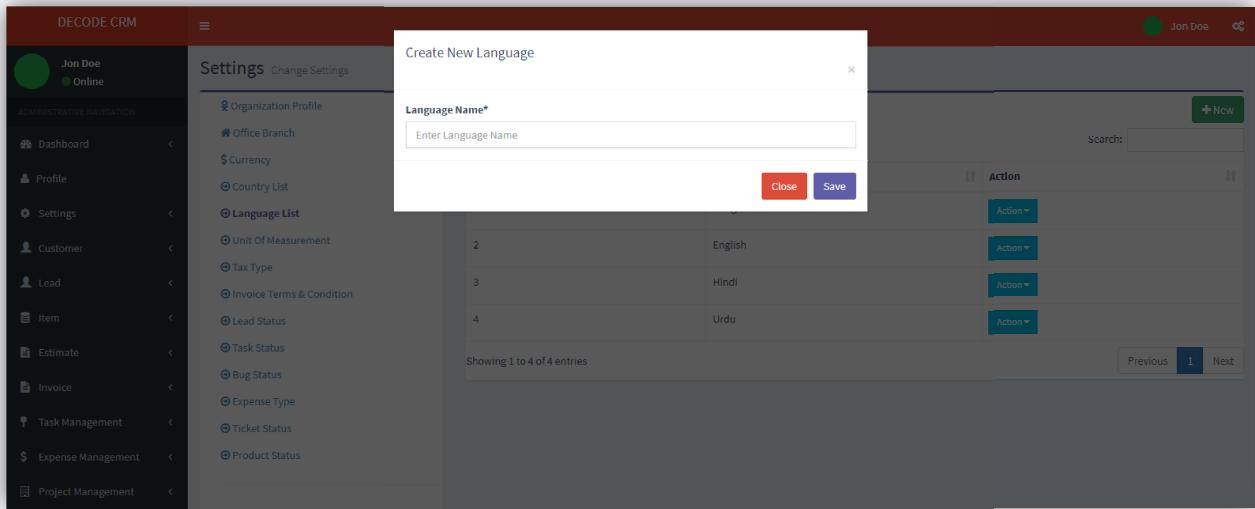


Fig 14.7 - Create Language

## 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

Uom List		
Show	10	entries
ID	UOM Name	Action
5	Kilogram	Action ▾
6	Liter	Action ▾
7	Per Day	Action ▾
8	Per Hour	Action ▾

Fig 14.8 - UOM List

Create Unit Of Measurement

UOM Name\*

Enter Uom Name

Close Save

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

**Tax List**

TAX No	TAX Name	TAX Percentage(%)	Action
6	No Tax	0	<span>⋮</span>
7	Tax1	10	<span>⋮</span>
8	Tax2	3.89	<span>⋮</span>

Fig 14.10 - Tax Type List

**Create New Tax Type**

**Tax Name\***  
Enter Tax Name

**Tax Percentage Value\***  
Enter Tax Percentage Value

**Save** **Close**

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.

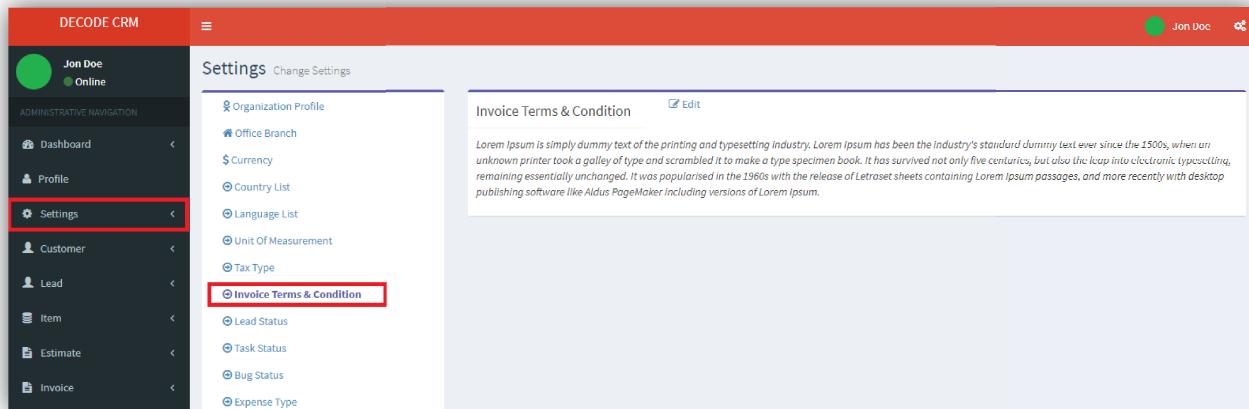


Fig 14.12 - Invoice Terms & Conditions

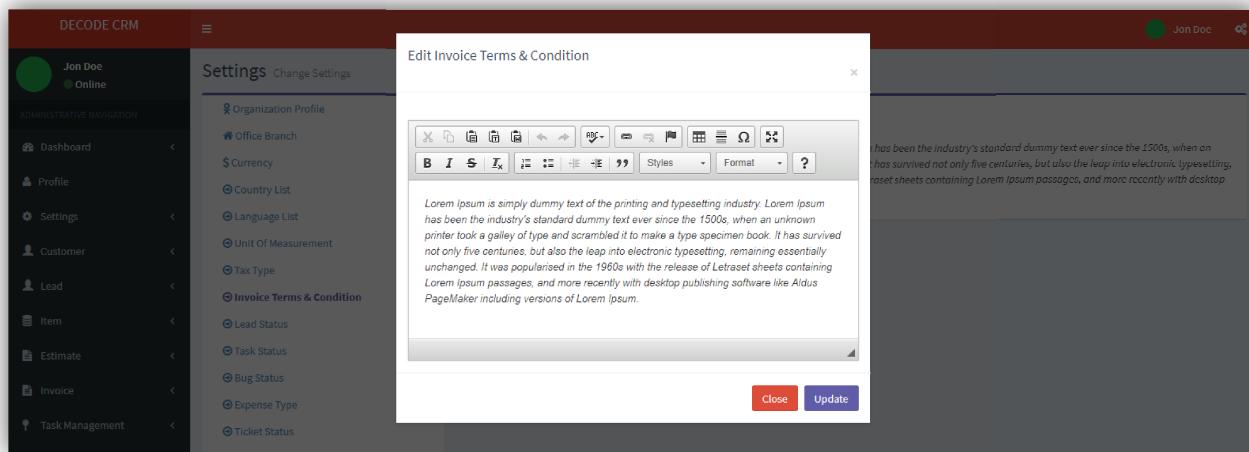


Fig 14.13 - Edit Invoice Terms & Conditions

## 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

The screenshot shows the DECODE CRM interface. On the left, there's a dark sidebar with various navigation options like Dashboard, Profile, Settings, Customer, Lead, Item, Estimate, Invoice, Task Management, and Expense Management. The 'Settings' option is highlighted with a red box. On the right, the main content area has a header with 'Jon Doe' and a 'Create lead status' button with a red arrow pointing to it. Below the header is a search bar and a table titled 'Lead Status List'. The table has columns for 'Lead Status No.', 'Status Name', and 'Action'. It contains three entries: 1. New Lead, 2. Working On, and 3. Customer. At the bottom of the table, it says 'Showing 1 to 3 of 3 entries'. There are also 'Previous' and 'Next' buttons at the bottom right of the table.

Lead Status No.	Status Name	Action
1	New Lead	
2	Working On	
3	Customer	

Fig 14.14 - Lead Status List

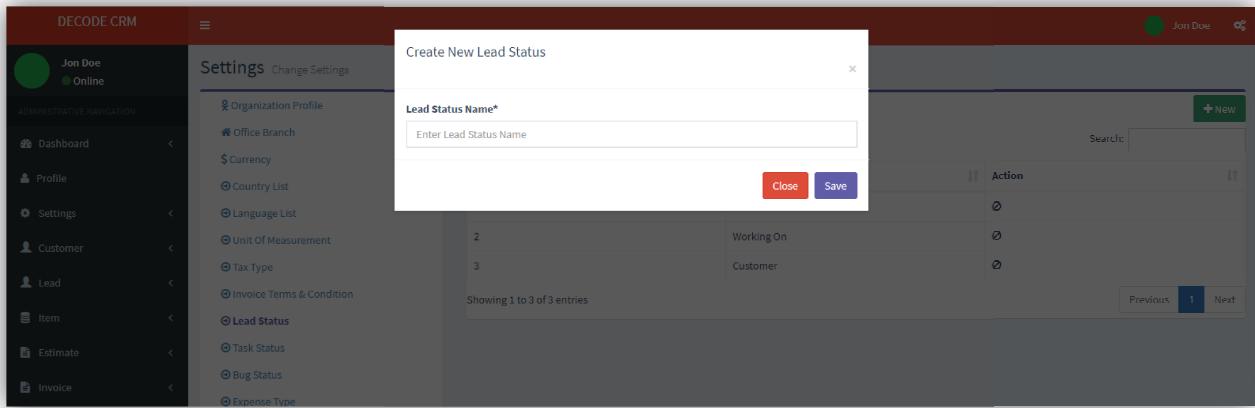


Fig 14.15 - Create Lead Status

## 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

Task Status List

Task Status No	Status Name	Action
1	In Complete	
2	Complete	
3	Test Task Status	

+ New

Fig 14.16 - Task status list

Create New Task Status

Task Status Name\*

Enter Task Status Name

Close Save

Task Status No	Status Name	Action
2	Complete	
3	Test Task Status	

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

Bug Status No	Status Name	Action
1	Fixed	∅
2	Unfixed	∅

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

#	Expense Type	Action
4	House Rent	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete
5	Electricity Bill	<input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete

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

**Ticket Status List**

Ticket Status No.	Status Name	Action
1	Resolved	<input type="button" value="Edit"/>
2	On Resolving Process	<input type="button" value="Edit"/>
3	Not Resolved	<input type="button" value="Edit"/>
5	In Progress	<input type="button" value="Edit"/>

Showing 1 to 4 of 4 entries

Fig 14.22- Ticket Status List

**Create New Task Status**

Task Status Name\*

Enter Task Status Name

Action
<input type="button" value="Edit"/>
<input type="button" value="Delete"/>

Showing 1 to 3 of 3 entries

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

Product Status List

ID	Product Status	Action
1	Active	
2	In Active	
3	Damaged	

Fig 14.24 - Product Status List

Create New Product Status

Product Status Name\*

Enter Product status Name

Close Save

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

The screenshot shows the DECODE CRM application. On the left, there is a dark sidebar with the title 'DECODE CRM' at the top. Below it, the user profile 'Jon Doe' and status 'Online' are displayed. The sidebar contains a navigation menu with several items: 'Dashboard', 'Profile', 'Settings' (which is highlighted with a red box), 'Customer', 'Lead', 'Item', 'Estimate', 'Invoice', 'Task Management', 'Expense Management', 'Project Management', and 'Employee Management'. Under the 'Settings' menu, there is a sub-menu with 'Organization Profile', 'Office Branch', 'Currency', 'Country List', 'Language List', 'Unit Of Measurement', 'Tax Type', 'Invoice Terms & Condition', 'Lead Status', 'Task Status', 'Bug Status', 'Expense Type', 'Ticket Status', 'Product Status', 'Employee Job Status' (which is highlighted with a red box), and 'Designation List'. The main content area has a red header bar with the text 'Create job status' and a green 'New' button. Below the header is a search bar labeled 'Search'. The main table is titled 'Employee Job Status' and shows three entries: #8 (Job Status Name: Permanent, Action: Edit), #11 (Job Status Name: Contractual, Action: Edit), and #12 (Job Status Name: KOL, Action: Edit). At the bottom of the table, it says 'Showing 1 to 3 of 3 entries'. There are also 'Previous' and 'Next' buttons.

Fig 14.26 - Employee Job Status List

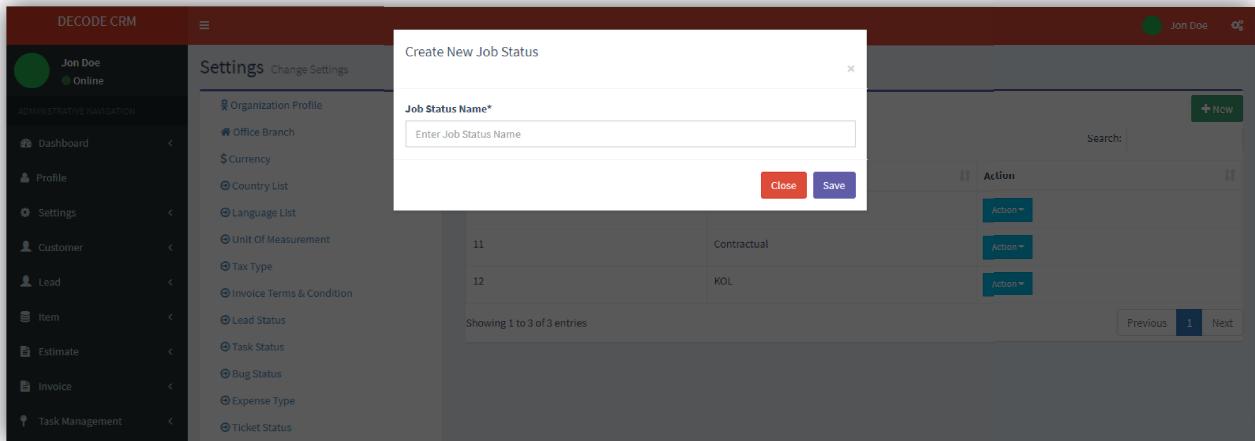


Fig 14.27 - Create Job Status

## 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

#	Designation Name	Action
5	Lecturer	Action
6	Associate Professor	Action
7	Assistant Professor	Action
8	Senior Lecturer	Action

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

The screenshot shows the DECODE CRM interface. On the left, there's a navigation sidebar with various modules like Dashboard, Profile, Settings (which is highlighted with a red box), Customer, Lead, Item, Estimate, Invoice, Task Management, Expense Management, Project Management, Employee Management, Tickets, and Roles & Permission. The main content area is titled 'Employee Department'. It shows a table with three entries:

#	Department Name	Designation List	Action
1	CSE	Lecturer (Delete designation) Associate Professor (Delete designation) Senior Lecturer (Delete designation)	Action
2	MSE	Assistant Professor (Delete designation) Senior Lecturer (Delete designation)	Action
3	LKO	Lecturer (Delete designation) Associate Professor (Delete designation)	Action

At the top right, there are buttons for 'Create Department' (green) and 'Assign Designation' (orange). The bottom of the page shows a footer with links for Home, Support, About Us, Contact Us, and Log Out.

Fig 14.30 – Department List

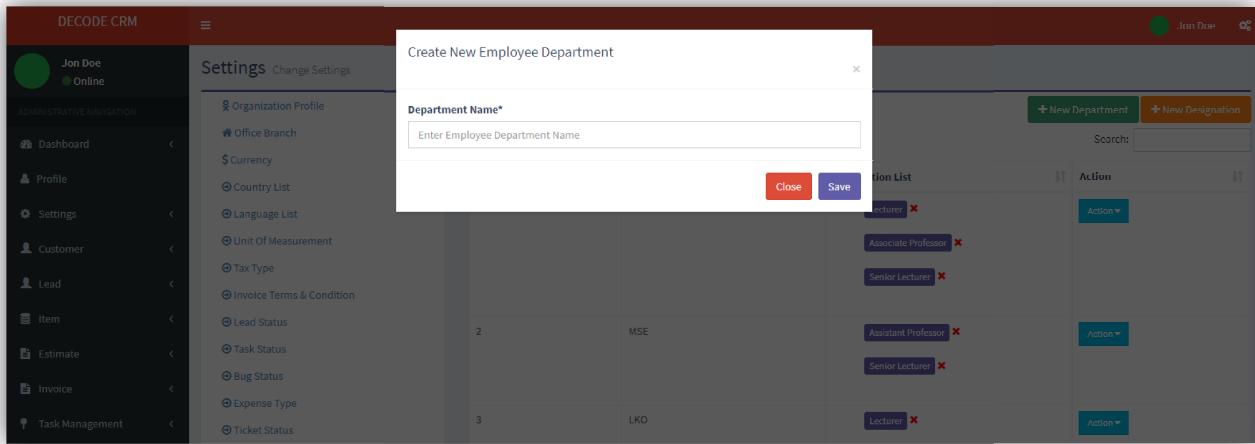


Fig14.31 - Create Department

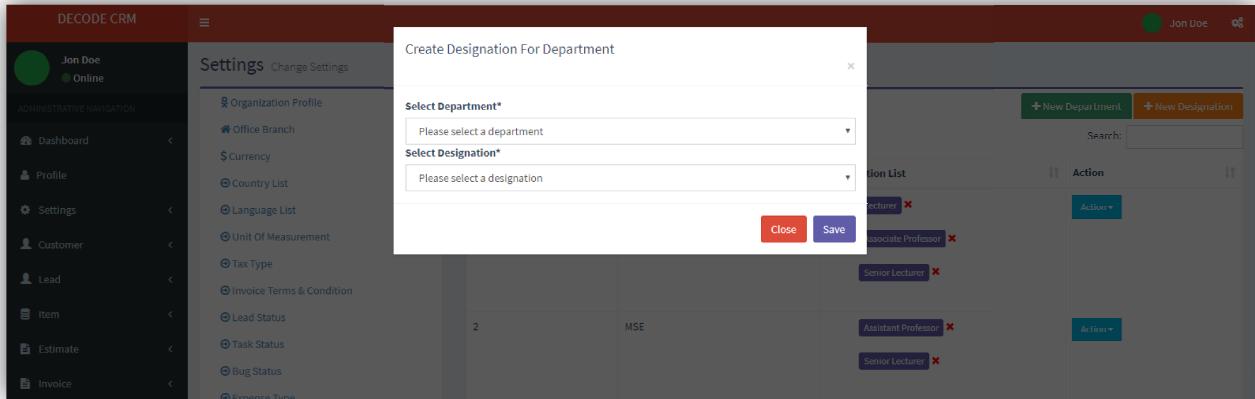


Fig 14.32 - Assign Designation

## 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

**SMTP Configuration**

Mail Driver:	smtp
Mail Host:	smtp.gmail.com
Port:	587
User Name :	badhon424@gmail.com
Password :	*meh1234
Mail Encryption:	tls

**Update SMTP**

**SMTP Setup**

Fig14.33 – SMTP Details

**Configure SMTP**

Mail Host\*  
Enter Mail Host Name

Mail Port\*  
Enter Mail Port

User Name\*  
[Redacted]

Password\*  
[Redacted]

**Save**

Fig 14.34 -Update SMTP

## 14.18 Change Password

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

ADMINISTRATIVE NAVIGATION

- Dashboard
- Profile
- Settings
- Customer
- Lead
- Item
- Estimate
- Invoice
- Task Management
- Expense Management
- Project Management
- Employee Management
- Tickets
- Roles & Permission

Organization Profile

Office Branch

Currency

Country List

Language List

Unit Of Measurement

Tax Type

Invoice Terms & Condition

Lead Status

Task Status

Bug Status

Expense Type

Ticket Status

Product Status

Employee Job Status

Designation List

Employee Department

SMTP Setup

Email Text

Change Password

Change Password

Email\*

Previous Password\*

New Password\*

Confirm Password\*

Change

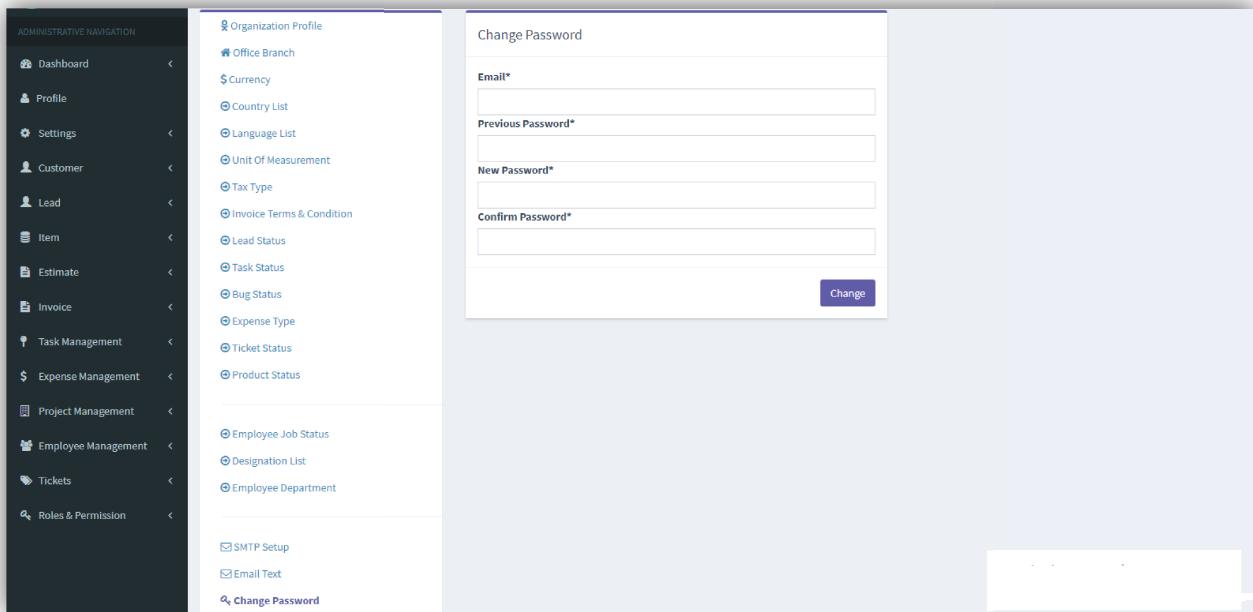


Fig 14.35 - Change Password

## 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.

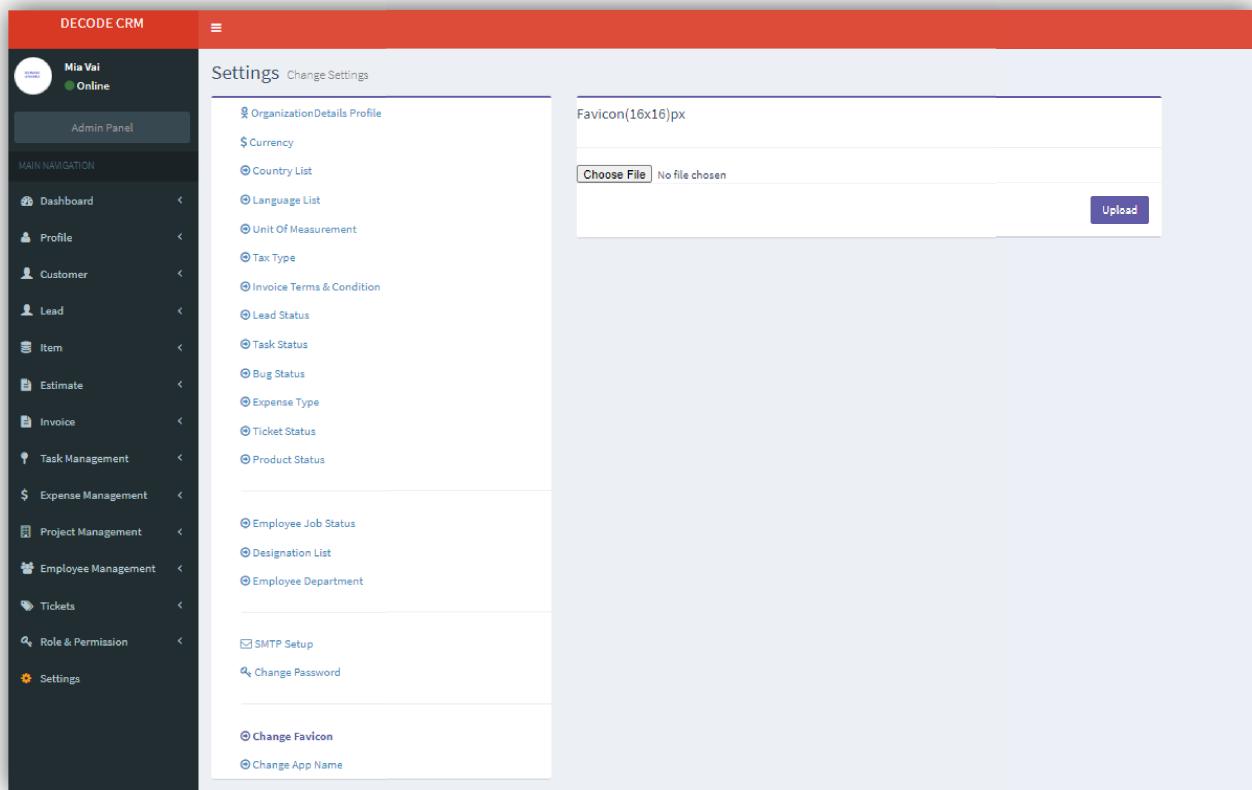


Fig 14.35 - Change Favicon

## 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.

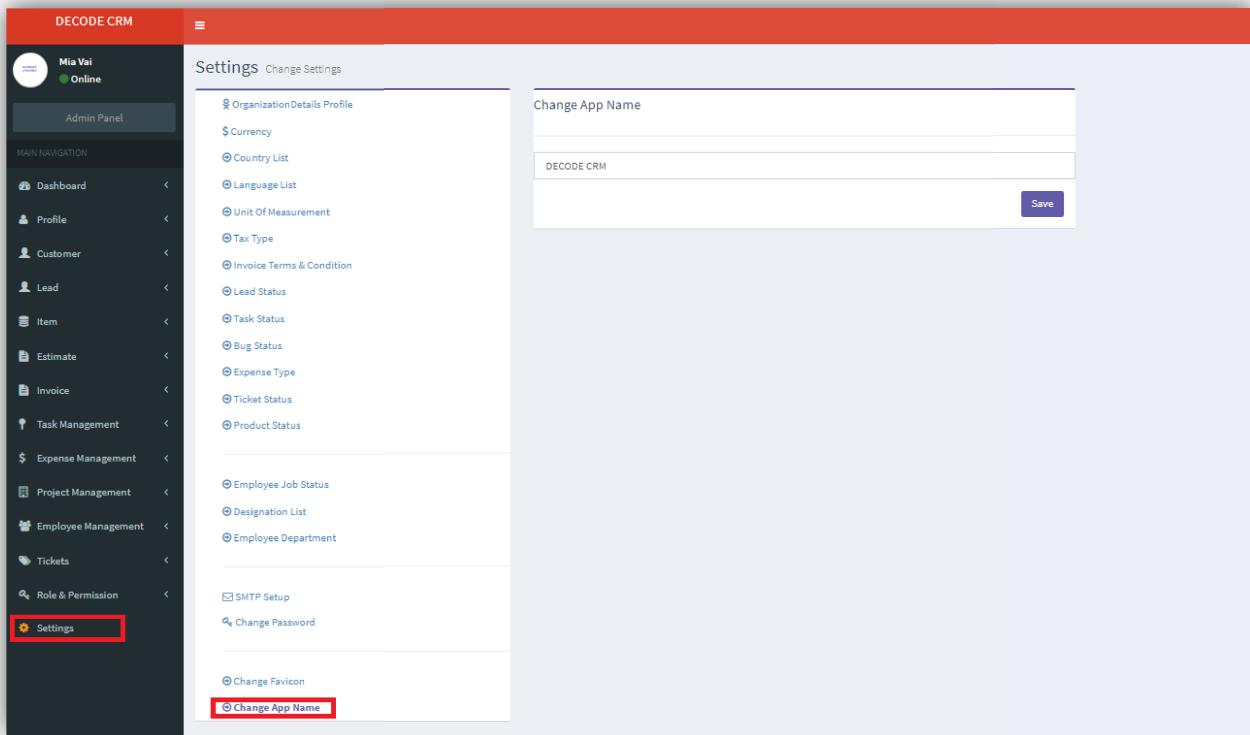


Fig 14.35 - Change App Name

### \*\*\*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.

