ConsultPro User Manual

HR & Consulting Management Platform

Version: 1.0 **Date:** December 2025 **Platform:** TeamACE Nigeria

---

Table of Contents

---

1. Introduction

1.1 About ConsultPro

ConsultPro is a comprehensive HR and Consulting Management Platform designed specifically for Nigerian consulting firms. It provides end-to-end management of client relationships, business development, staff outsourcing, and financial operations.

1.2 Key Features

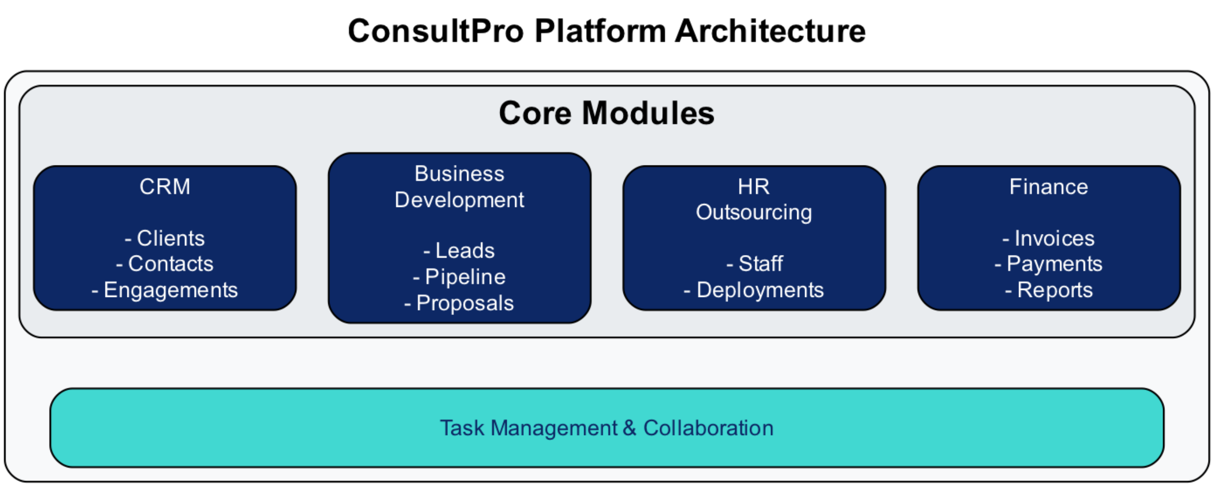

Figure 1: Platform Architecture

1.3 Nigeria-Specific Compliance

ConsultPro includes built-in compliance for Nigerian financial regulations:

- **VAT (Value Added Tax):** 7.5% automatically calculated on invoices
- **WHT (Withholding Tax):** 5% for services, 10% for professional services
- **TIN Validation:** Nigerian Tax Identification Number format support
- **RC Number:** CAC Registration number tracking
- **Currency:** Nigerian Naira (NGN) formatting throughout

---

2. Getting Started

2.1 System Requirements

- Modern web browser (Chrome, Firefox, Safari, or Edge)
- Internet connection
- Screen resolution: 1280x720 or higher recommended

2.2 Accessing the Platform

1. Open your web browser
2. Navigate to the ConsultPro URL provided by your administrator
3. You will see the login screen

2.3 Login Process

Steps to Login: 1. Enter your registered email address 2. Enter your password 3. Click "Sign In" 4. Upon successful login, you'll be redirected to the Dashboard

Demo Credentials (for testing): - Email: `admin@teamace.ng` - Password: `Demo123!`

2.4 Navigation Overview

The main navigation is located in the left sidebar:

---

3. Dashboard Overview

3.1 Dashboard Layout

The Dashboard provides a quick overview of your business operations at a glance.

3.2 Dashboard Metrics Explained

Metric	Description
Active Clients	Number of clients with active engagements
Active Leads	Open leads not yet converted
Deployed Staff	Staff currently assigned to client sites
Outstanding Revenue	Total unpaid invoice amounts

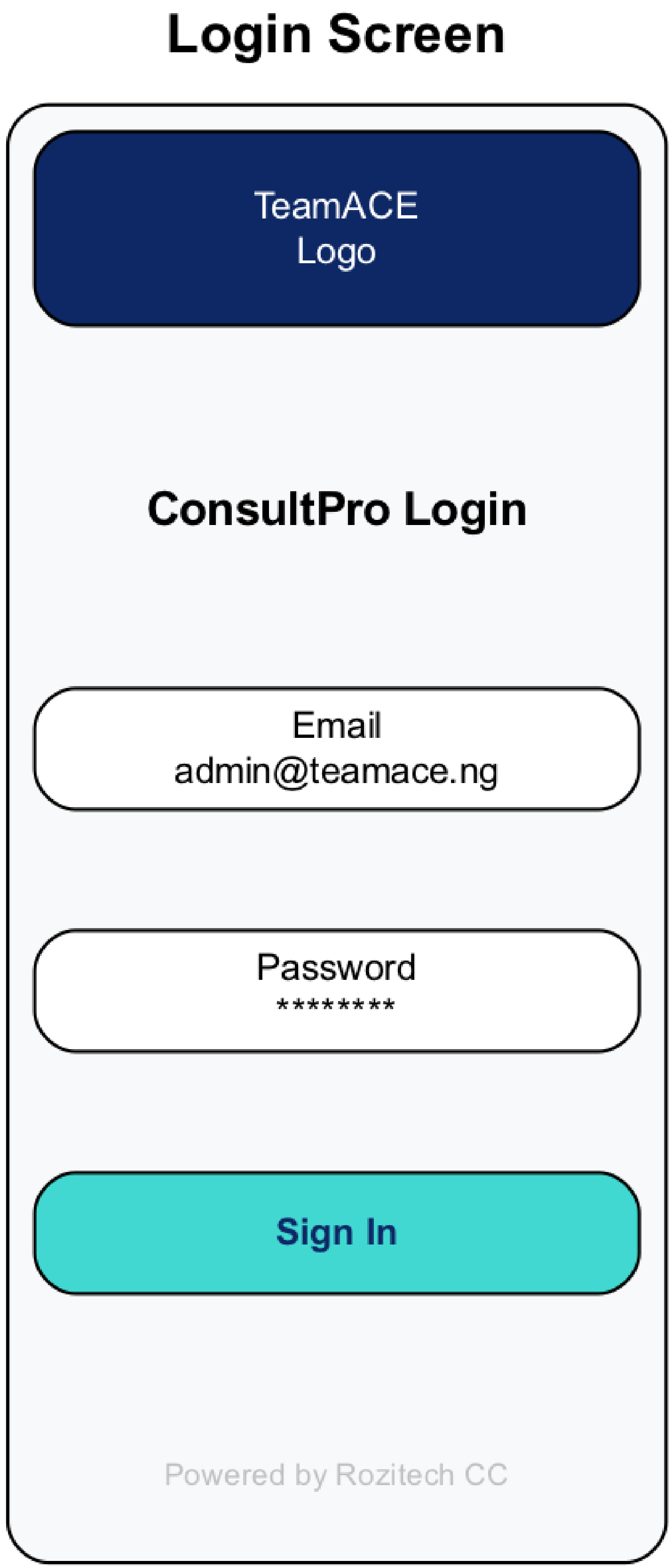

Figure 2: Login Screen

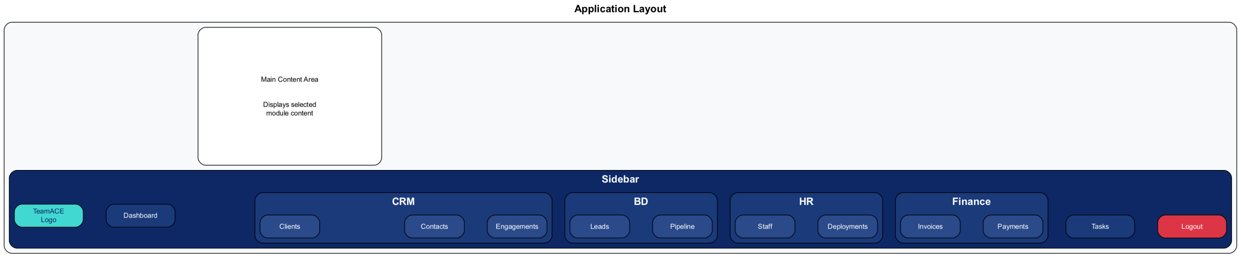

Figure 3: Navigation Layout

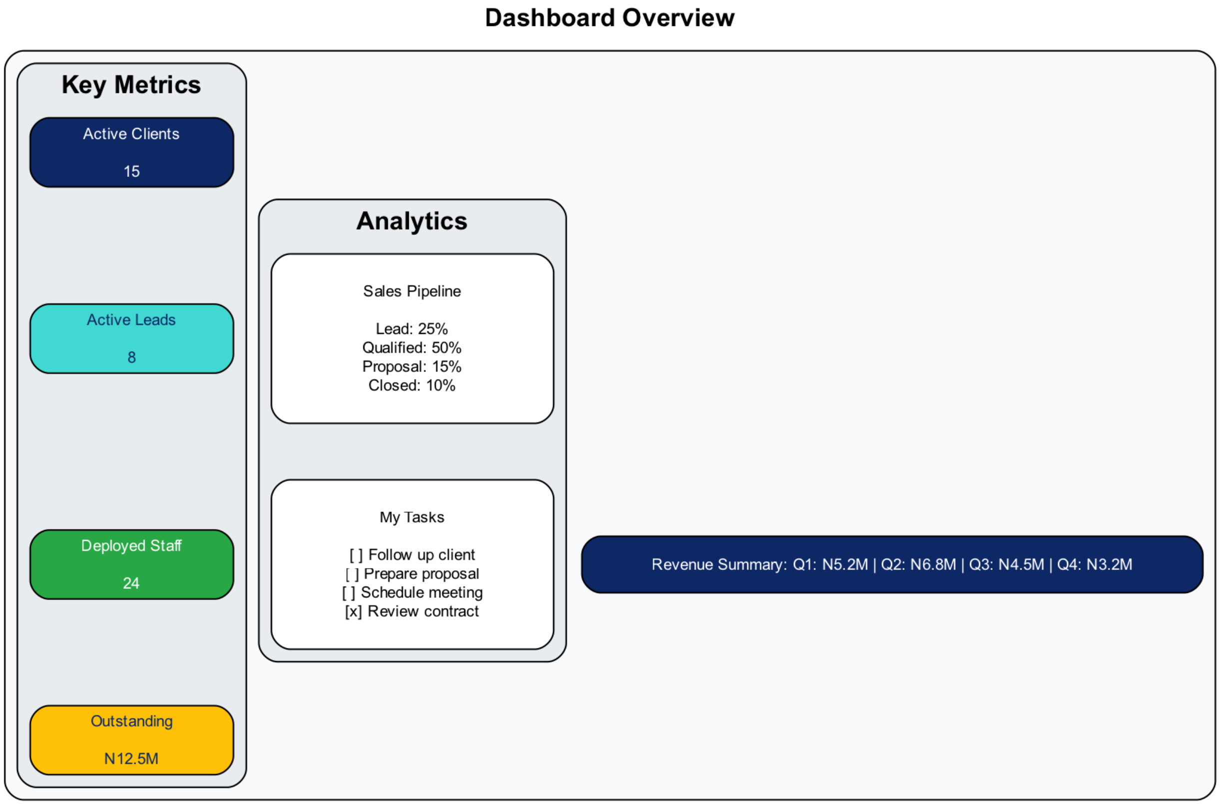

Figure 4: Dashboard Layout

4. CRM Module

The CRM (Customer Relationship Management) module helps you manage your client relationships, contacts, and engagements.

4.1 Clients

Viewing Clients

The Clients page displays all your client companies in a searchable, filterable list. Each row shows: - Company icon/avatar - Company name - Industry - Status (Active, Prospect, Inactive) - Action buttons (Edit, Delete)

Adding a New Client

1. Click the **"+ Add Client"** button
2. Fill in the client details form:

Required Fields: Company Name (*)

Client Detail View

Click on any client row to view detailed information:

- Contact information
- Compliance details (TIN, RC Number)
- Status and tier information
- Associated contacts and engagements

4.2 Contacts

Managing Contacts

Contacts are individual people associated with your client companies. The contacts list shows: - Contact avatar (initials) - Full name - Associated company - Email address - Decision maker status

Adding a Contact

1. Click **"+ Add Contact"**
2. Select the associated client company
3. Enter contact details:
    - First Name, Last Name (required)
    - Email, Phone
    - Job Title, Department
    - Mark as "Decision Maker" if applicable

4.3 Engagements

Engagements represent active projects or service contracts with clients.

Engagement Types

Type	Description
HR Outsourcing	Staff placement and management services
Recruitment	Talent acquisition services
Training	Corporate training programs
Consulting	Advisory and consulting services

Type	Description
Payroll	Payroll management services

Engagement Status Workflow

Creating an Engagement

1. Click **"+ Add Engagement"**
2. Select the client
3. Enter engagement details:
    - Engagement Name
    - Type (HR Outsourcing, Recruitment, etc.)
    - Contract Value (in NGN)
    - Start and End dates
    - Description

---

5. Business Development Module

5.1 Lead Management

Lead Pipeline Stages

Lead Sources

Track where your leads come from:

Source	Description
Website	Leads from your company website
Referral	Client or partner referrals
Cold Call	Outbound prospecting
Event	Conferences, seminars, networking
Social Media	LinkedIn, etc.
Other	Any other source

Adding a Lead

5.2 Sales Pipeline

Kanban View

The Pipeline page provides a visual Kanban board of your sales pipeline:

Understanding Pipeline Metrics

- **Stage Count:** Number of leads in each stage
- **Stage Value:** Total estimated value of leads in stage
- **Probability:** Likelihood of closing (increases as lead progresses)

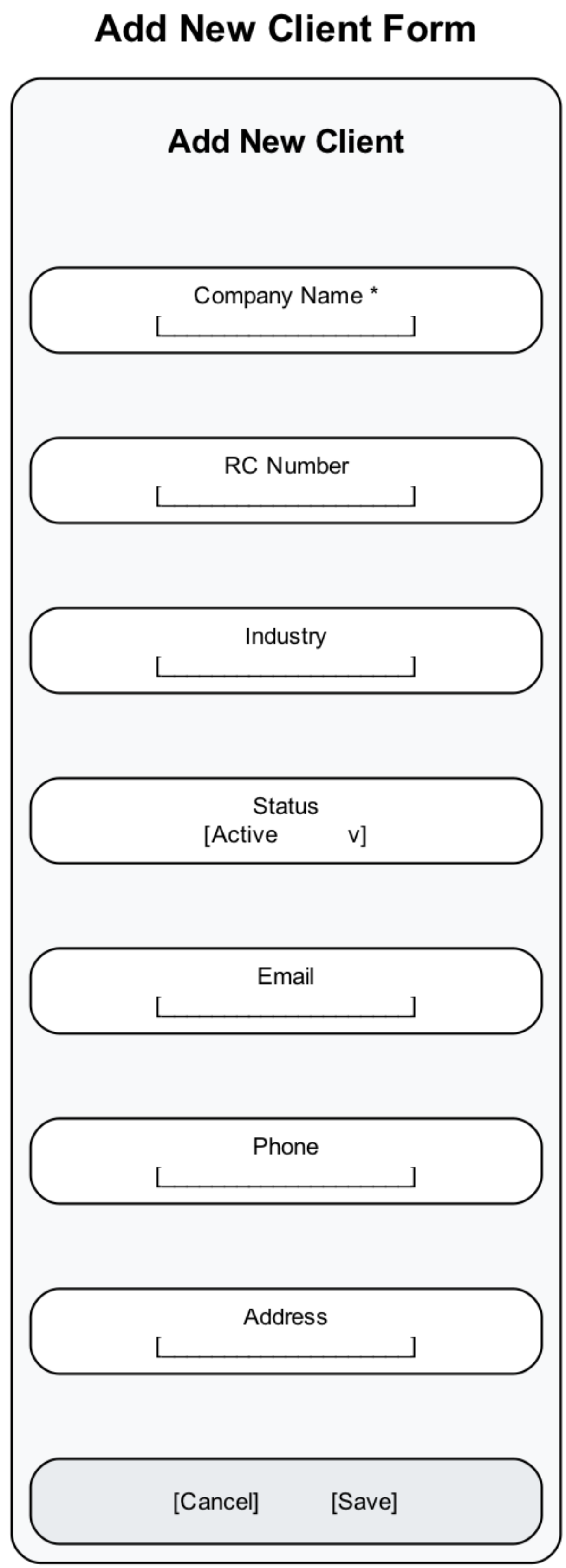

Figure 5: Add Client Form

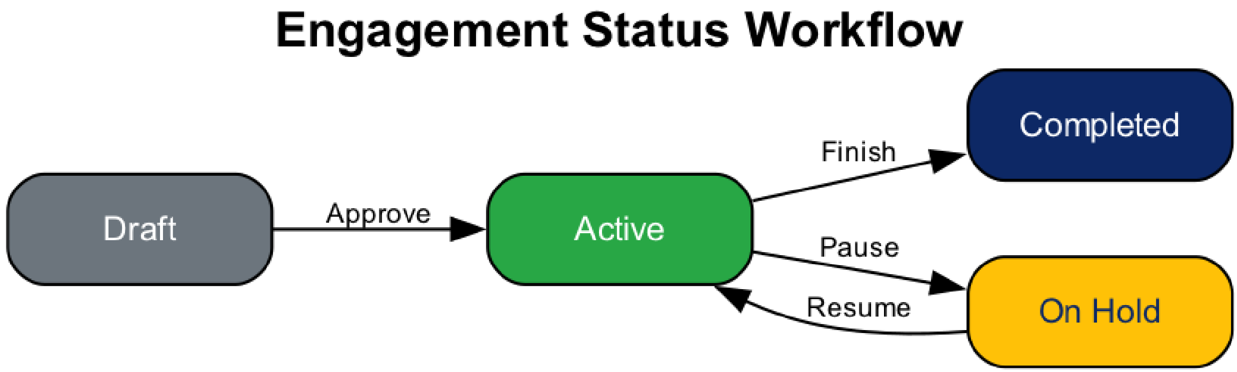

Figure 6: Engagement Workflow

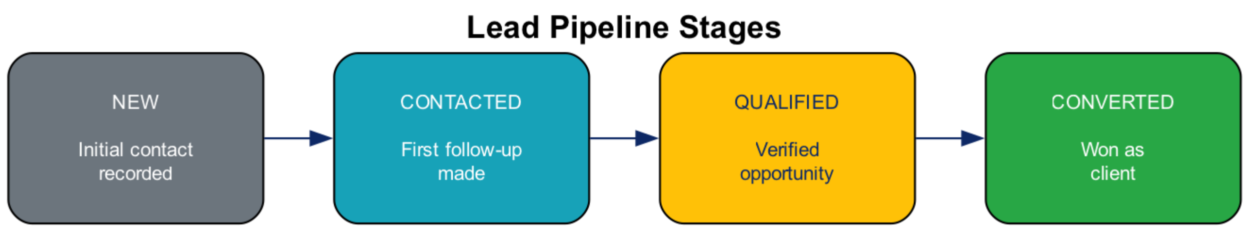

Figure 7: Lead Pipeline Stages

6. HR Outsourcing Module

6.1 Staff Pool

Staff Status Types

Status	Description	Color
Available	Ready for deployment	Green
Deployed	Currently assigned to client	Blue
On Leave	Temporarily unavailable	Yellow

Staff Profile

Adding Staff

1. Click **"+ Add Staff"**
2. Fill in employee details:
   - Employee ID (auto-generated or custom)
   - First Name, Last Name
   - Contact information
   - Job Title and Department
   - Skills (comma-separated)
   - Hourly Rate

6.2 Deployments

Deployment Workflow

Creating a Deployment

1. Navigate to **HR > Deployments**
2. Click **"+ Add Deployment"**
3. Select:
   - Staff Member (from pool)
   - Client Company

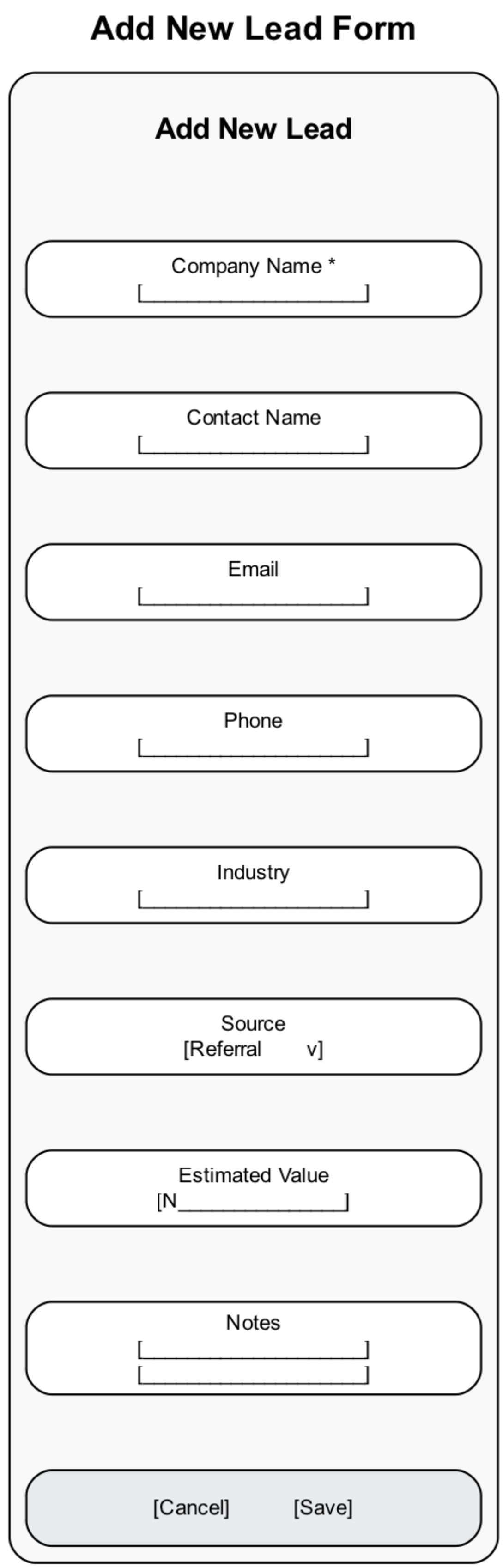

Figure 8: Add Lead Form

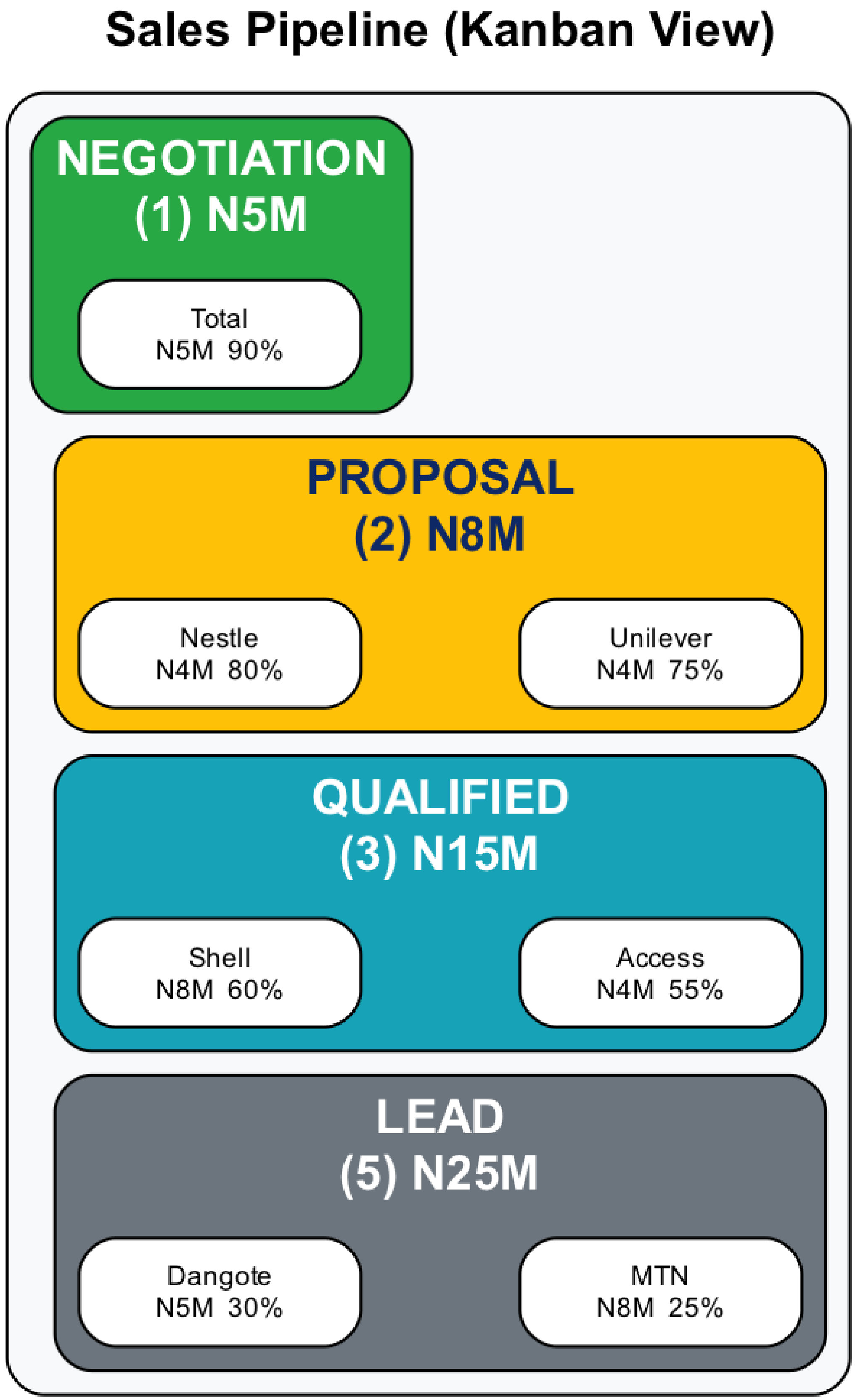

Figure 9: Sales Pipeline Kanban

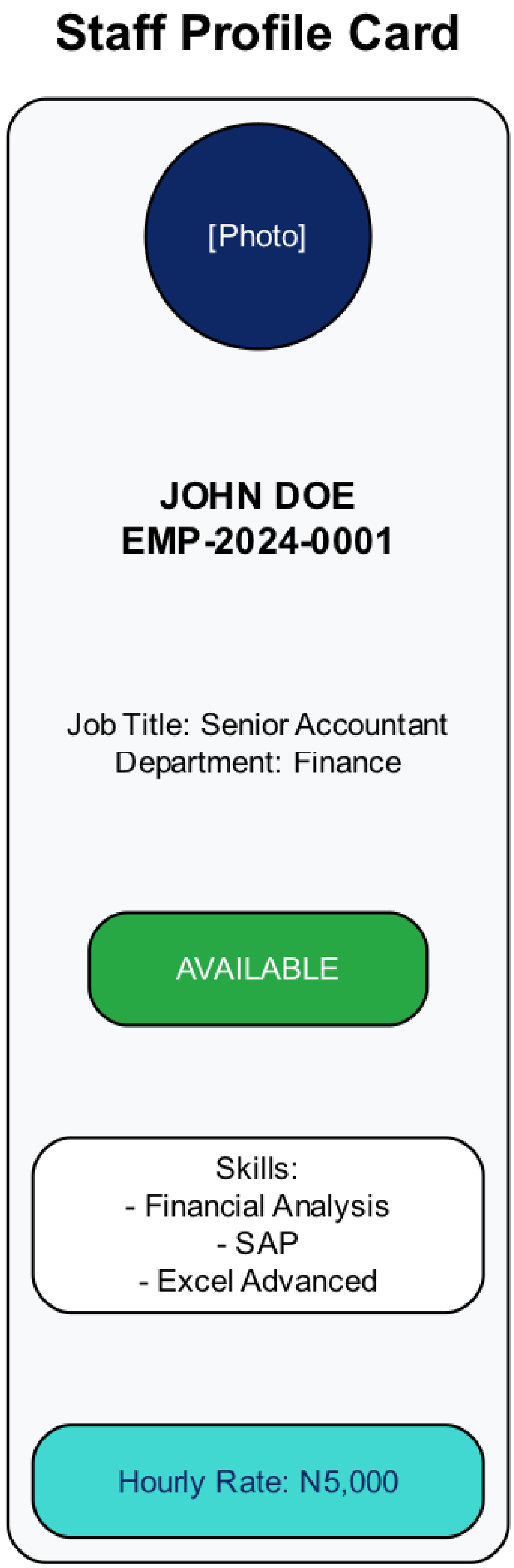

Figure 10: Staff Profile Card

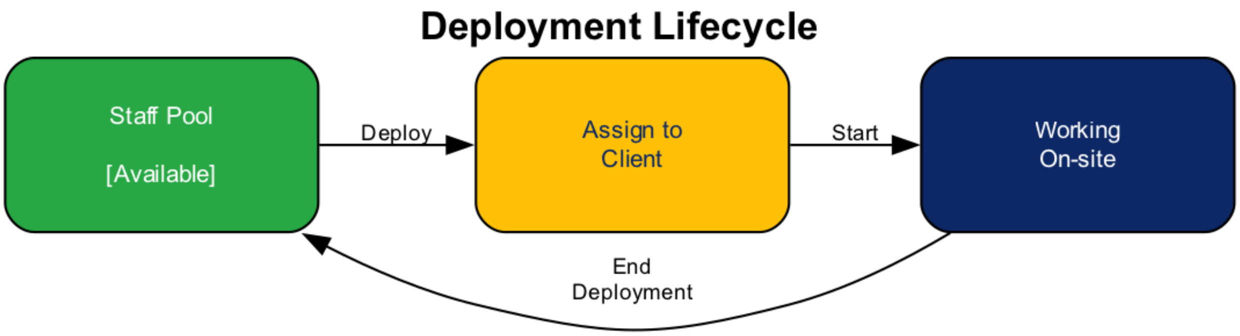

Figure 11: Deployment Lifecycle

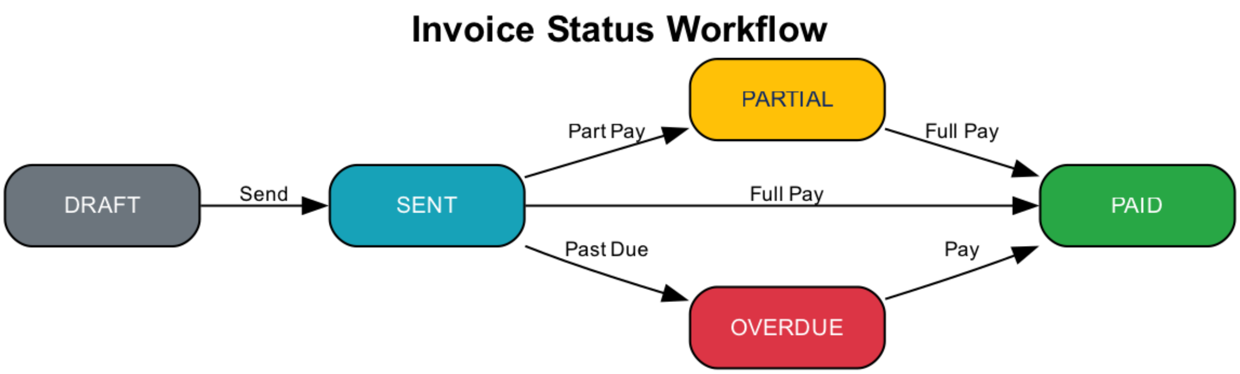

Figure 12: Invoice Workflow

7. Finance Module

7.1 Invoices

Invoice Workflow

Nigerian Tax Calculation

ConsultPro automatically calculates Nigerian taxes:

Tax Rules: - VAT Rate: 7.5% on subtotal - WHT Rate: 5% for services (10% for professional services) - Total = Subtotal + VAT - WHT

Creating an Invoice

1. Navigate to **Finance > Invoices**
2. Click **"+ Add Invoice"**
3. Fill in the form:

Invoice Summary Dashboard

The invoices page displays summary metrics at the top: - **Outstanding:** Total unpaid invoice amounts - **Paid (Month):** Total payments received this month - **Overdue:** Total overdue invoice amounts

7.2 Payments

Recording Payments

1. Navigate to **Finance > Payments**
2. Click **"+ Add Payment"**
3. Select the invoice (only unpaid invoices shown)
4. Enter payment details:
   - Payment Date
   - Amount
   - Payment Method
   - Reference Number

Payment Methods

Method	Description
Bank Transfer	Electronic bank transfer
Cash	Cash payment
Cheque	Payment by cheque
Card	Credit/Debit card
Other	Other payment methods

---

8. Task Management

8.1 Task Overview

Tasks help you track action items and to-dos across all modules.

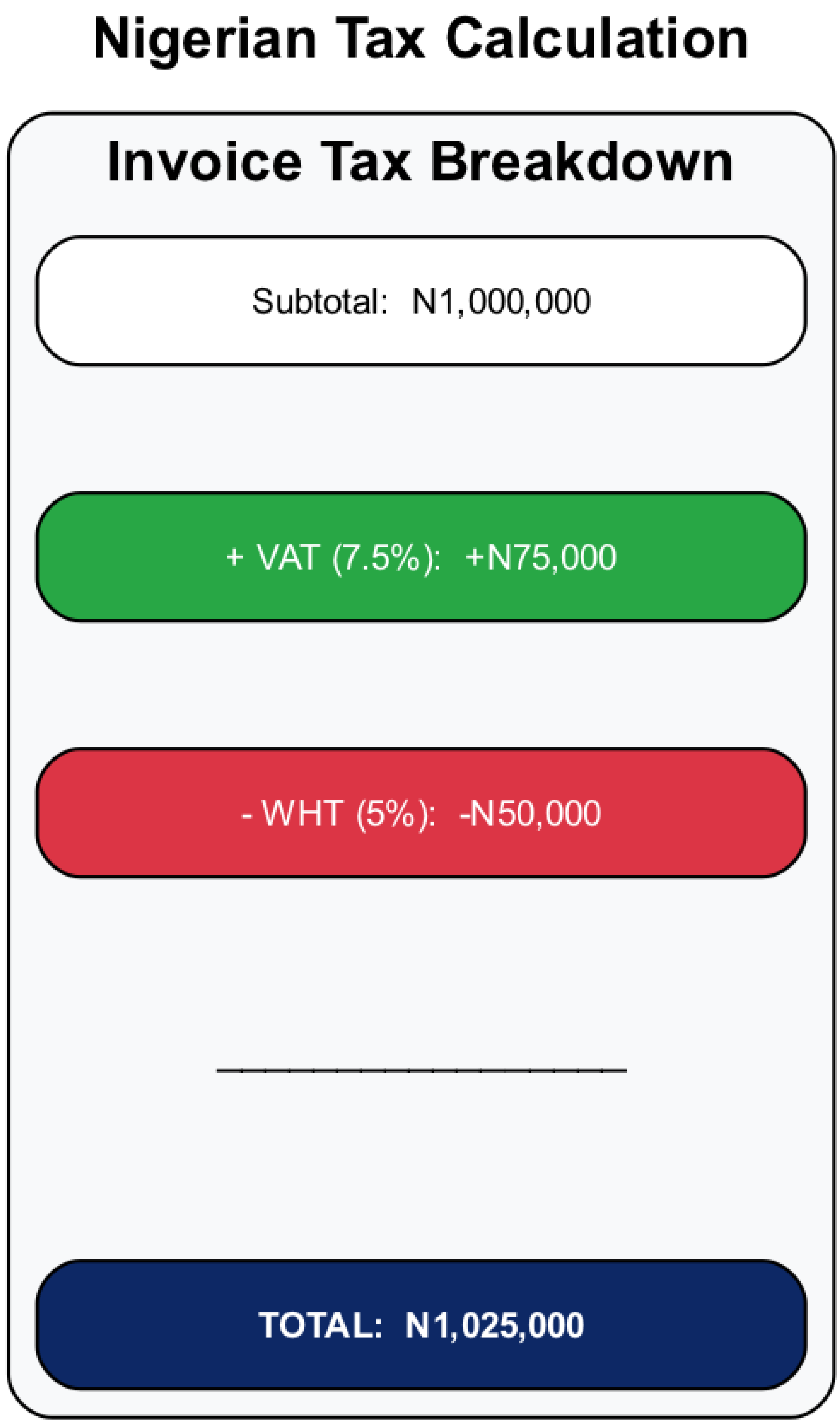

Figure 13: Invoice Tax Calculation

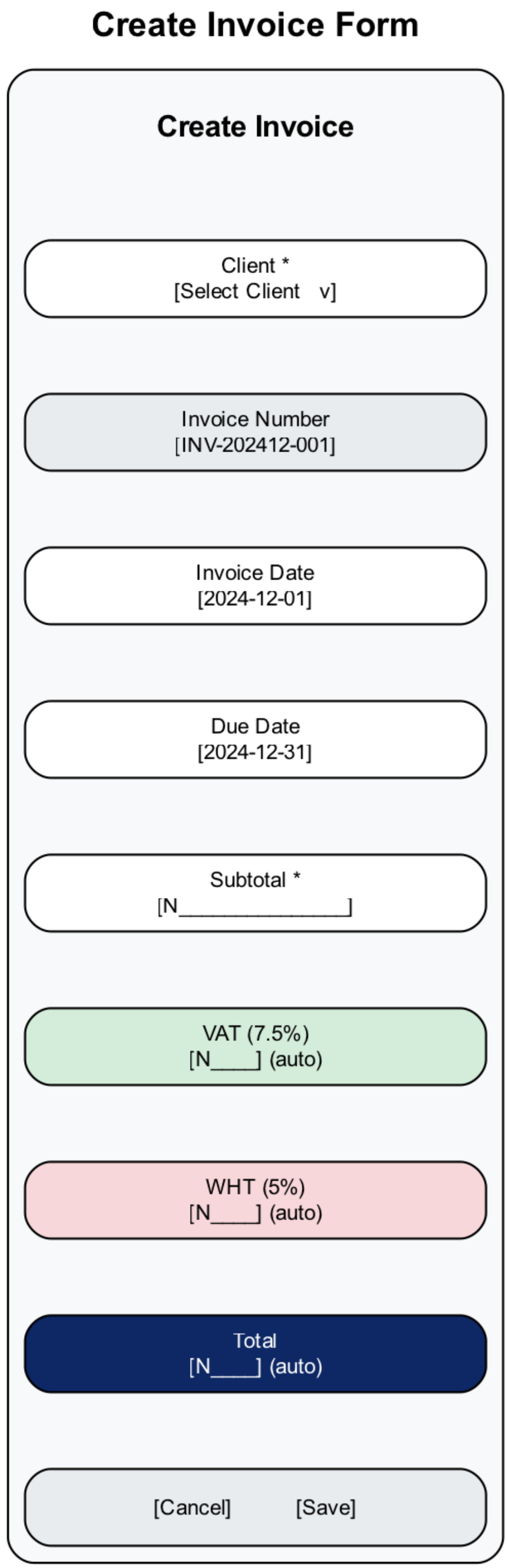

Figure 14: Create Invoice Form

Task Priority Levels

Priority	Color	Usage
Urgent	Red	Critical items needing immediate attention
High	Orange	Important items to complete soon
Medium	Blue	Standard priority items
Low	Gray	Can be deferred if needed

Task Status Flow

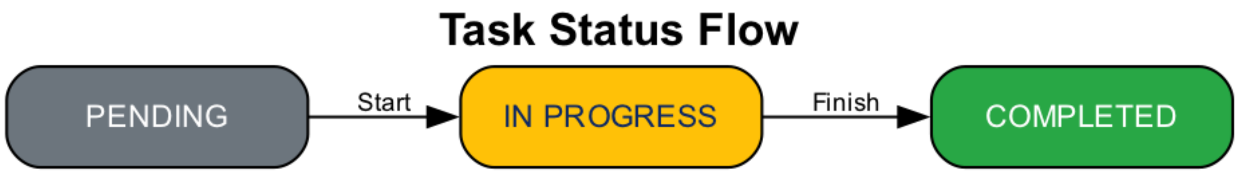

Figure 15: Task Status Flow

8.2 Task List View

8.3 Creating Tasks

1. Click **"+ Add Task"**
2. Enter task details:
    - Title (required)
    - Description
    - Associated Client (optional)
    - Priority Level
    - Due Date
    - Initial Status

---

9. Workflows & Best Practices

9.1 Complete Client Onboarding Workflow

9.2 Monthly Billing Workflow

9.3 Best Practices

Data Entry

- Always fill in required fields (marked with *)
- Use consistent naming conventions
- Keep contact information up to date
- Add notes for important context

Lead Management

- Update lead status promptly
- Add estimated values for pipeline forecasting
- Set realistic expected close dates
- Document all interactions in notes

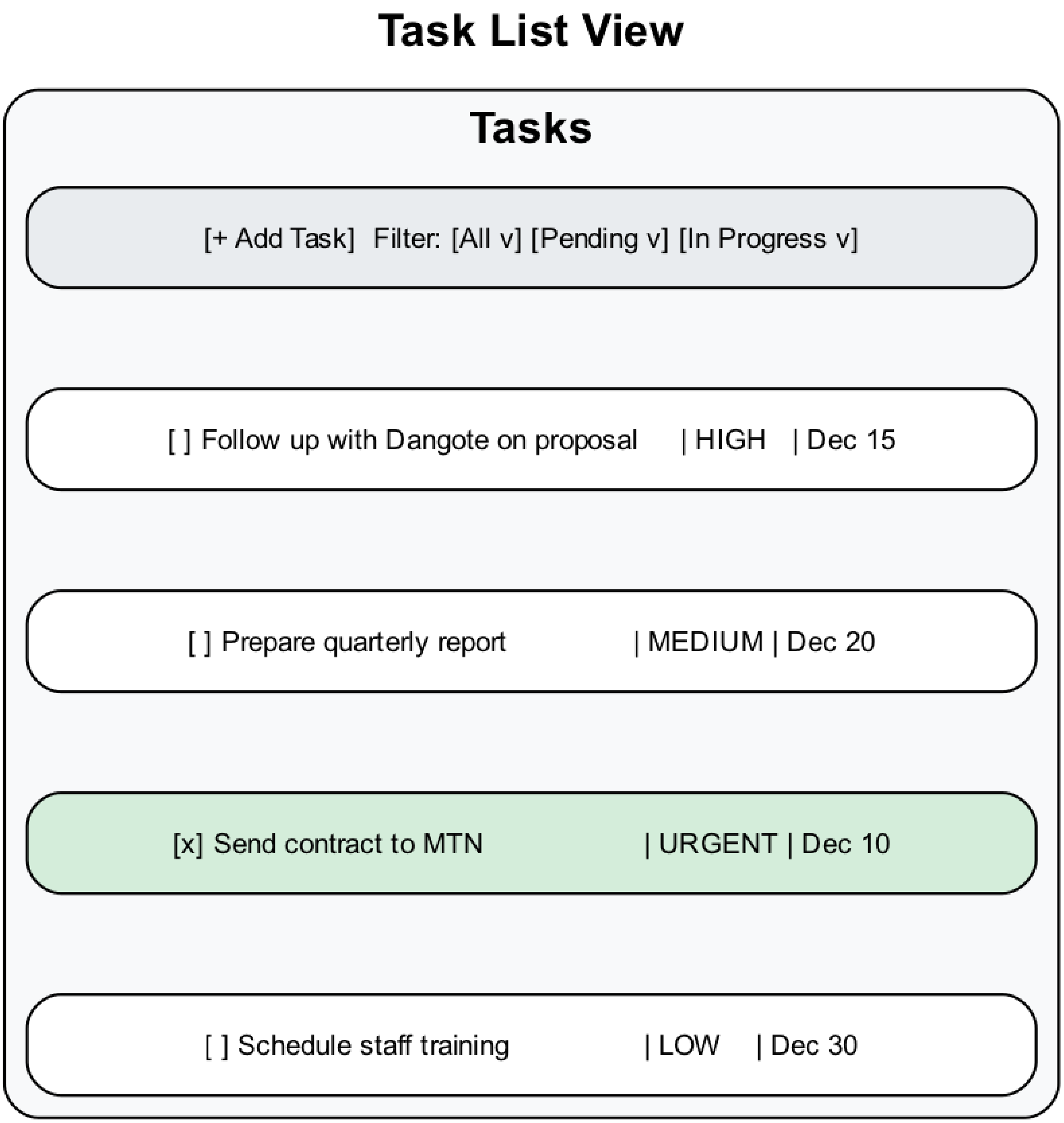

Figure 16: Task List View

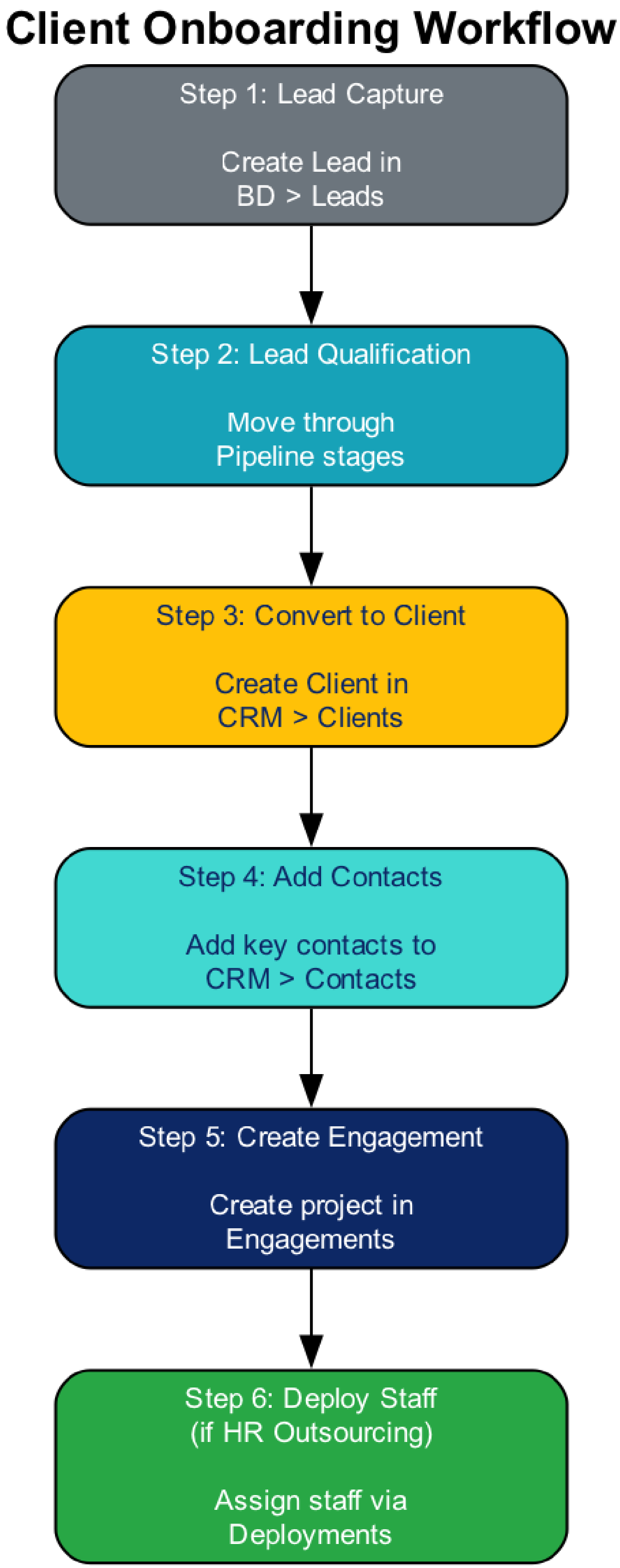

Figure 17: Client Onboarding Workflow

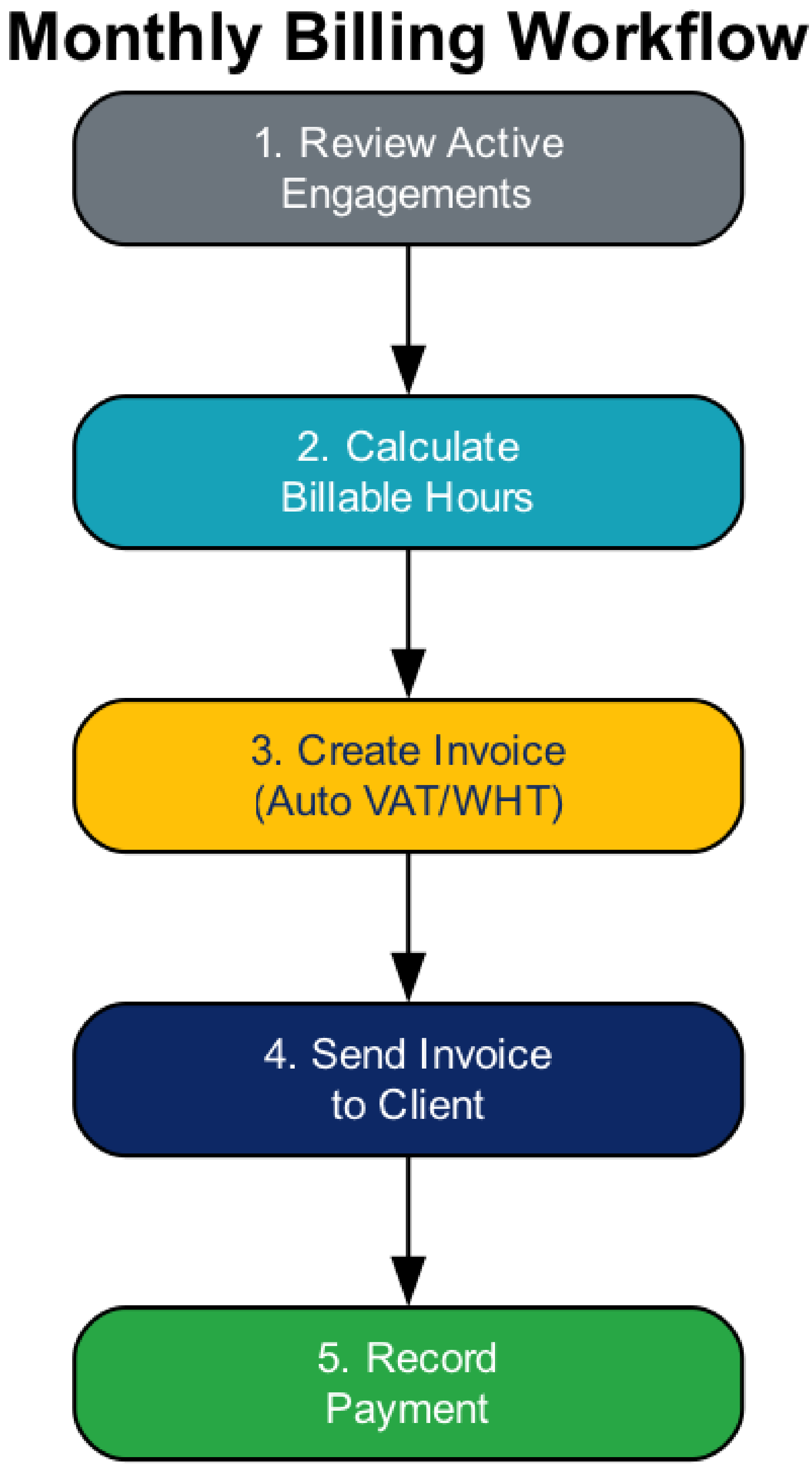

Figure 18: Monthly Billing Workflow

Financial Management

- Create invoices promptly after service delivery
- Set appropriate due dates (default: 30 days)
- Record payments immediately upon receipt
- Monitor overdue invoices regularly

Task Management

- Create tasks for all action items
- Set appropriate priorities
- Update status as work progresses
- Link tasks to relevant clients

---

10. Troubleshooting

10.1 Common Issues

Login Problems

Issue	Solution
Invalid credentials	Verify email and password
Session expired	Log in again
Page not loading	Clear browser cache and refresh

Data Not Saving

Issue	Solution
Form validation error	Check required fields are filled
Network error	Check internet connection
Save button not responding	Refresh page and try again

Display Issues

Issue	Solution
Layout broken	Refresh page or clear cache
Data not loading	Wait for loading to complete
Sidebar missing	Toggle mobile menu on small screens

10.2 Getting Help

For technical support: 1. Contact your system administrator 2. Report issues with specific error messages 3. Include steps to reproduce the problem

---

Quick Reference Card

Module Quick Access

Module	Path
Dashboard	/
Clients	/clients
Contacts	/contacts
Engagements	/engagements
Leads	/leads
Pipeline	/pipeline
Staff	/staff
Deployments	/deployments
Invoices	/invoices
Payments	/payments
Tasks	/tasks

Status Colors

Color	Meaning
Green	Active, Available, Completed, Paid
Blue	In Progress, Deployed
Yellow	Pending, On Hold, Partial
Orange	High Priority
Red	Overdue, Urgent
Gray	Inactive, Low Priority

ConsultPro User Manual v1.0 Powered by Rozitech CC December 2025