Venturing Digitally – Project Management System Documentation

Date: October 2025
Prepared by: Venturing Digitally Pvt. Ltd.
Document Type: Functional Documentation

1. Project Overview

The **Project Management System** developed by **Venturing Digitally Pvt. Ltd.** is an all-in-one web-based solution designed to manage and monitor various aspects of projects, clients, financials, and company operations.
It simplifies project tracking, enhances collaboration among teams, and ensures that all operational data is managed efficiently in a centralized environment.

2. Objective and Scope

Objective

To build a comprehensive system that provides an organized and structured way to manage:

- Project details and progress
- Task creation and assignment
- Client and company information
- Financial activities such as invoices, deals, and income tracking

Scope

The system allows users to:

- Create, edit, and view records across all modules
- Track progress and maintain data consistency
- Improve collaboration between project managers, clients, and team members.

3. System Modules

Below is the detailed breakdown of all modules, submodules, and their functionalities as derived from the project structure.

3.1 Dashboard

Purpose:
Provides an overview of all project activities, performance indicators, and quick navigation links.

Features:

- Real-time project summary
- Quick view of active tasks and upcoming deadlines
- Key metrics for leads, deals, and finances

3.2 Projects

Purpose:
Manage and monitor all projects within the system.

Create:
Project Title, Description, Start Date, End Date, Status (Not Started, In Progress, Completed).

Edit:
All project details can be updated, including timelines and descriptions.

View:
View essential details such as Project Title, Start Date, End Date, and Status.

Detailed View:
Comprehensive details of a project including description, start/end dates, and progress metrics.

3.3 Tasks

Submodule: Task Assignment
Purpose: Manage project tasks and assign them to team members.

Create:
Task Name, Description, Project Name, Assigned To, Priority (High/Medium/Low), Due Date.

Edit:
Update existing task details or reassign tasks.

View:
Overview of all tasks, their project association, assignee, and priority.

Detailed View:
Shows detailed task description, assignment, and deadlines.

3.4 To-Do List

Purpose:
Allows individual users to manage daily activities and reminders.

Create/Edit/View:
Todo Name, Project Name, and Priority (High/Medium/Low).

Description:
Helps users organize their workflow by tracking pending items or small goals.

3.5 Clients

Purpose:
Manage client data and relationships effectively.

Create:
Client Name, Email, Address, Country, State, Pin-code, Phone No., and Company Name.

Edit:
Update client details such as address or contact information.

View:
Display client contact and location details.

Detailed View:
Comprehensive view with client's profile, project association, and communication details.

3.6 Company

Purpose:
Maintain internal company details and linked clients or projects.

Create/Edit/View:
Company Name, Phone No., Email, Address, Country, State, Pincode, Associated Clients.

Detailed View:
Full company profile with all associated entities.

3.7 Leads

Purpose:
Manage and track potential clients or business opportunities.

Create:
Name, Email, Contact Number, Lead Source, and Description.

Edit:
Modify or update lead information.

View:
Displays current status such as New, Discussed, or Converted.

Detailed View:
Complete overview including source of lead, contact details, and follow-up status.

3.8 Deals

Purpose:
Track deals and negotiations associated with clients and projects.

Create/Edit/View:
Deal Name, Client Name, Start Date, End Date, Value, Status.

Detailed View:
Full record of deal including history and related client details.

3.9 Invoices

Purpose:
Generate, manage, and track invoices.

Create/Edit/View:
Invoice Date, Due Date, Status (Paid/Due/Overdue), Amount, Project Name, Client Name.

Detailed View:
Detailed breakdown of invoice items, amounts, and payment tracking.

3.10 Finance

Submodules: Income
Purpose:
Track financial transactions, revenue sources, and payment records.

Create/Edit/View:
Client Name, Project Name, Amount, Payment Mode, Payment Date.

Detailed View:
Detailed financial overview per project or client basis.

3.11 Expenses

Purpose:
Manages and tracks all organizational expenses, ensuring financial transparency.

Create/Edit/View/Detailed View:
Expense Name, Amount, Date, Purchased By, Purchase Type, Payment Mode, Notes, and Attachments.

Description:
Allows tracking of all business expenses and maintaining expense records for reports and audits.

3.12 Settings – Bank Accounts

Purpose:
Manages company bank account details for financial transactions.

Create/Edit/View/Detailed View:
Bank Name, Account Holder Name, Account Number, Account Type, IFSC Code, and Status (Active/Inactive).

Description:
Centralized control of all company bank accounts used in invoices and finance modules.

3.13 Employee Management

Purpose:
Manages employee records, roles, and access permissions.

Create/Edit/View/Detailed View:
Name, Phone, Email, Password, Confirm Password, Role, and Status (Active/Inactive).

Description:
Facilitates employee management with controlled access and role-based functionality.

3.14 Reports

Submodules:

- Project Reports
- Task Reports
- Leads Reports
- Expense Reports
- Client Reports

Purpose:
Generate analytical reports for various modules.

Description:
Provides insights into overall project progress, task completion, lead conversion rates, expense summaries, and client engagement.

3.15 Tickets

Purpose:
Enables support management by creating and tracking tickets.

Create/Edit/View/Detailed View:
Ticket Title, Description, Project Name, Client Name, Priority (Low/Medium/High), and Assigned To.

Description:
Streamlines client and team issue tracking for faster resolution and better support workflow.

3.16 Announcements

Purpose:
Send company-wide or client-specific announcements.

Create/Edit/View/Detailed View:
Subject, Description, Recipient Type (Clients/Members/All), and Date.

Description:
Helps management communicate updates, notices, or information efficiently.

3.17 Notifications

Purpose:
System-generated alerts for activities like task updates, project status, or new messages.

Description:
Ensures users are always informed about relevant actions and deadlines.

3.18 Teams

Purpose:
Manages teams and assigns members under a designated lead.

Create/Edit/View/Detailed View:
Team Name, Team Lead, and Team Members (Multiselect).

Description:
Organizes staff into structured teams for better coordination and accountability.

3.19 Timesheet

Purpose:
Tracks working hours on projects and tasks.

Create/Edit/View/Detailed View:
Project, Task, Assigned To, Start Date, End Date, and Total Time.

Description:
Maintains logs of task durations for productivity and performance measurement.

3.20 Login

Purpose:
Authenticates users to securely access the system.

Create:
Email, Password.

Description:
Login module provides secure access based on user credentials and assigned roles.

3.21 Profile

Purpose:
Displays and manages user profiles.

Create/View/Detailed View:
Name, Email, Contact Number, and Status (Active/Inactive).

Description:
Allows super admin or users to update their personal and professional information.

3.22 Reset Password

Purpose:
Allows users to change or reset their passwords securely.

Create:
Old Password, New Password, Confirm Password.

Description:
Enhances account security through encrypted password management.

3.23 Meeting Schedule

Purpose:
Manages meeting creation and scheduling for teams and clients.

Create/Edit/View/Detailed View:
Meeting Name, Agenda, Start Time and Date, Team Members, and Meeting Link.

Description:
Ensures smooth coordination and organized meeting management.

3.24 Roles and Permissions

Purpose:
Manages system roles and defines permission levels.

Description:
Allows administrators to assign module-level access and maintain user privileges.

3.25 Proposals

Purpose:
Create and manage client proposals and quotations.

Create/Edit/View/Detailed View:
Client Lead, Template Selection, Proposal Title, Proposal Value, and Description.

Description:
Automates proposal creation and tracking for lead conversions.

3.26 Documentation

Purpose:
Stores and manages project-related documents.

Description:
Provides centralized document storage accessible by authorized users.

3.27 Sprint

Purpose:
Tracks daily work updates and sprint planning for teams.

Description:
Allows managers to review and evaluate ongoing daily activities and progress reports.

4. Extended Workflow Overview

1. **User Authentication** – Secure login with role-based access.
2. **Project & Task Management** – Create, assign, and track tasks.
3. **Expense & Finance Handling** – Manage income, invoices, and expenses.
4. **Team & Employee Coordination** – Form teams and manage timesheets.
5. **Communication Management** – Use announcements, notifications, and meetings for coordination.
6. **Reporting & Analytics** – Generate actionable reports for management.
7. **Support System** – Manage issues through tickets.
8. **Documentation & Proposal Handling** – Keep track of all project documents and client proposals.
9. **Security & Roles** – Assign permissions and maintain data integrity.

5. Technical Architecture & Tech Stack

Architecture Overview

The Project Management System is developed on a **three-tier architecture**:

1. **Frontend (Presentation Layer):**
    a. Built using HTML5, CSS3/Tailwind CSS, JavaScript, and React/bootstrap responsive UI.
    b. Provides an intuitive interface for all users (Admin, HR, Finance, Employees).
2. **Backend (Application Layer):**
    a. Powered by **Django Framework (Python)**.
    b. Handles all business logic, authentication, and data processing.

3. **Database Layer:**
    a. **PostgreSQL** is used as the relational database for high performance, security, and scalability.

Technology Stack

Layer	Technology
Frontend	HTML5, CSS3/Tailwind CSS, JavaScript, and React/bootstrap
Backend	Django (Python 3.x)
Database	PostgreSQL
Web Server	Gunicorn / Nginx
Hosting	AWS / Hostinger / Cloud Platform
Version Control	Git & GitHub
Authentication	Django Auth System, Session Management
Reporting	Django ORM + Custom Export Utilities

6. Hosting & Deployment

- Application deployed on **Linux-based cloud hosting (AWS/Hostinger)**.
- Uses **Gunicorn** as WSGI server and **Nginx** as reverse proxy.
- Database hosted securely on **PostgreSQL** with limited remote access.
- Static and media files managed using Django Storage System.

7. Scalability & Maintenance

- Modular Django architecture allows adding/removing modules easily.
- PostgreSQL ensures high scalability with large datasets.
- Automated migrations using Django ORM.
- Easy integration with APIs and third-party tools.

8. Final Summary

The **Venturing Digitally – Project Management System** integrates project tracking, finance management, employee monitoring, and communication into one unified platform.

It enhances productivity, transparency, and decision-making, making it ideal for businesses managing multiple projects and teams simultaneously.