BRAND

EMPLOYEE USER MANUAL

Contents

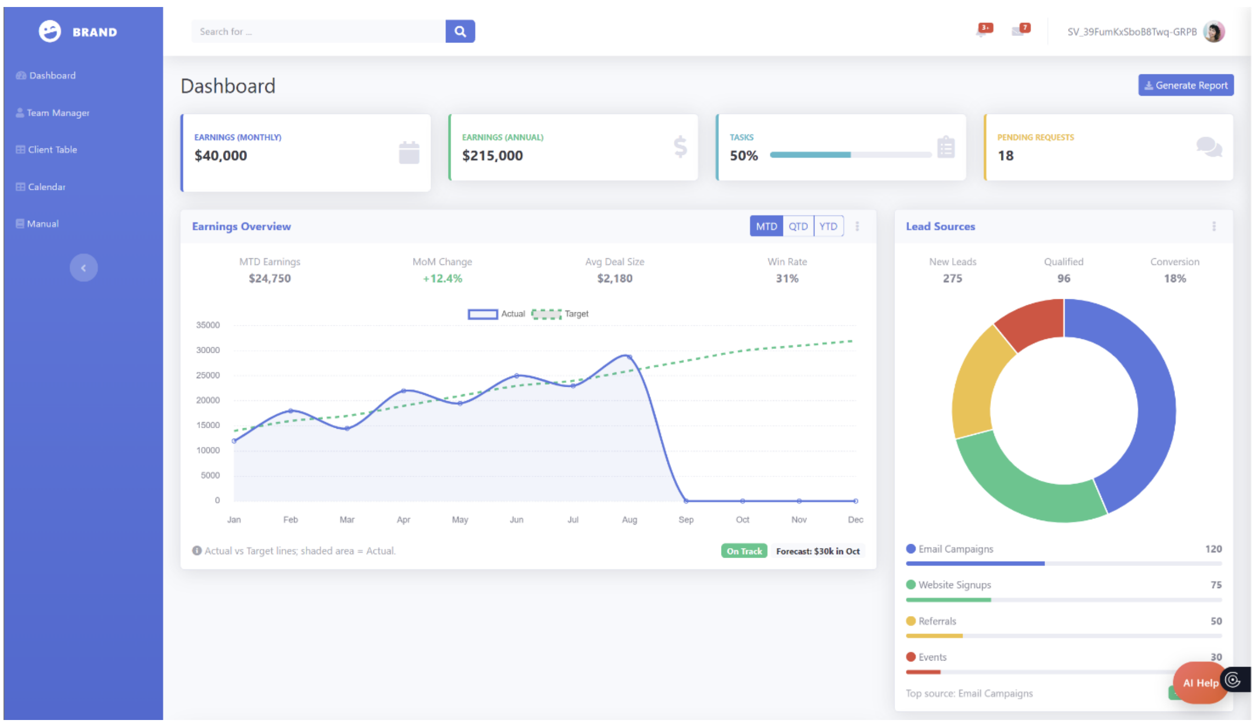
Dashboard (Home & Analytics)

URL: https://crmsystemaistmarytx.onrender.com/

Purpose

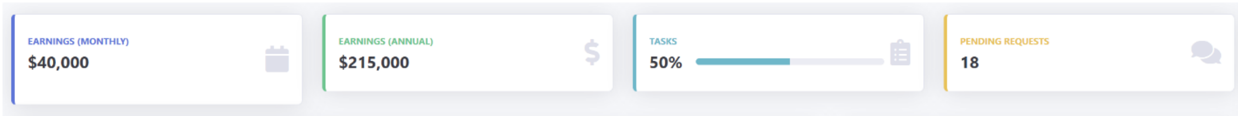
The Dashboard serves as the central command center for CRM users, providing an at-a-glance overview of key performance metrics, recent activity, and actionable insights. Specifically, this page enables users to monitor earnings trends, track lead sources, manage daily tasks, and assess overall business health through interactive visualizations and real-time data displays. In particular, sales representatives, team managers, and executives access this page to quickly understand current performance and identify areas requiring attention.

Page Layout & Navigation



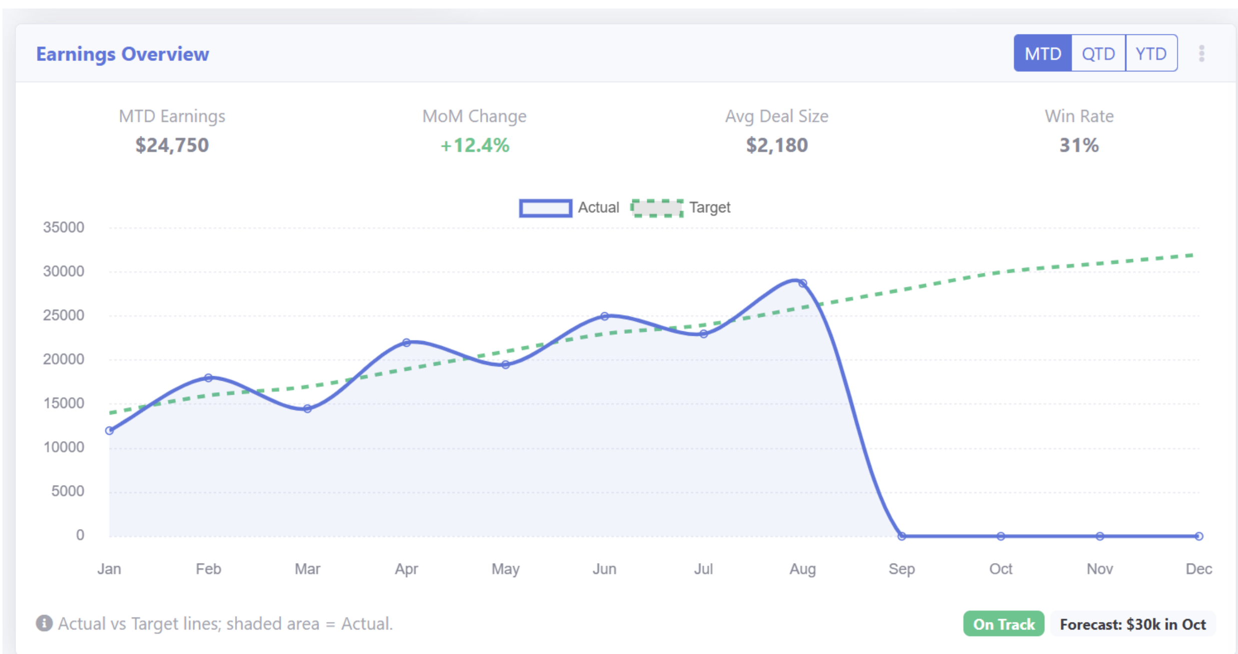
At the top of the page, users encounter a fixed navigation bar containing a search field, notification icons (alerts and messages), and a user profile dropdown menu. In the left sidebar, the primary navigation menu displays links to major CRM modules including Dashboard, Team Manager, Client Table, Calendar, and Manual (for authorized users). Below the navigation elements, the main content area is organized into vertical sections that flow from top to bottom, beginning with summary cards, followed by detailed analytics charts, and concluding with project tracking and task management areas.

Summary Cards Section

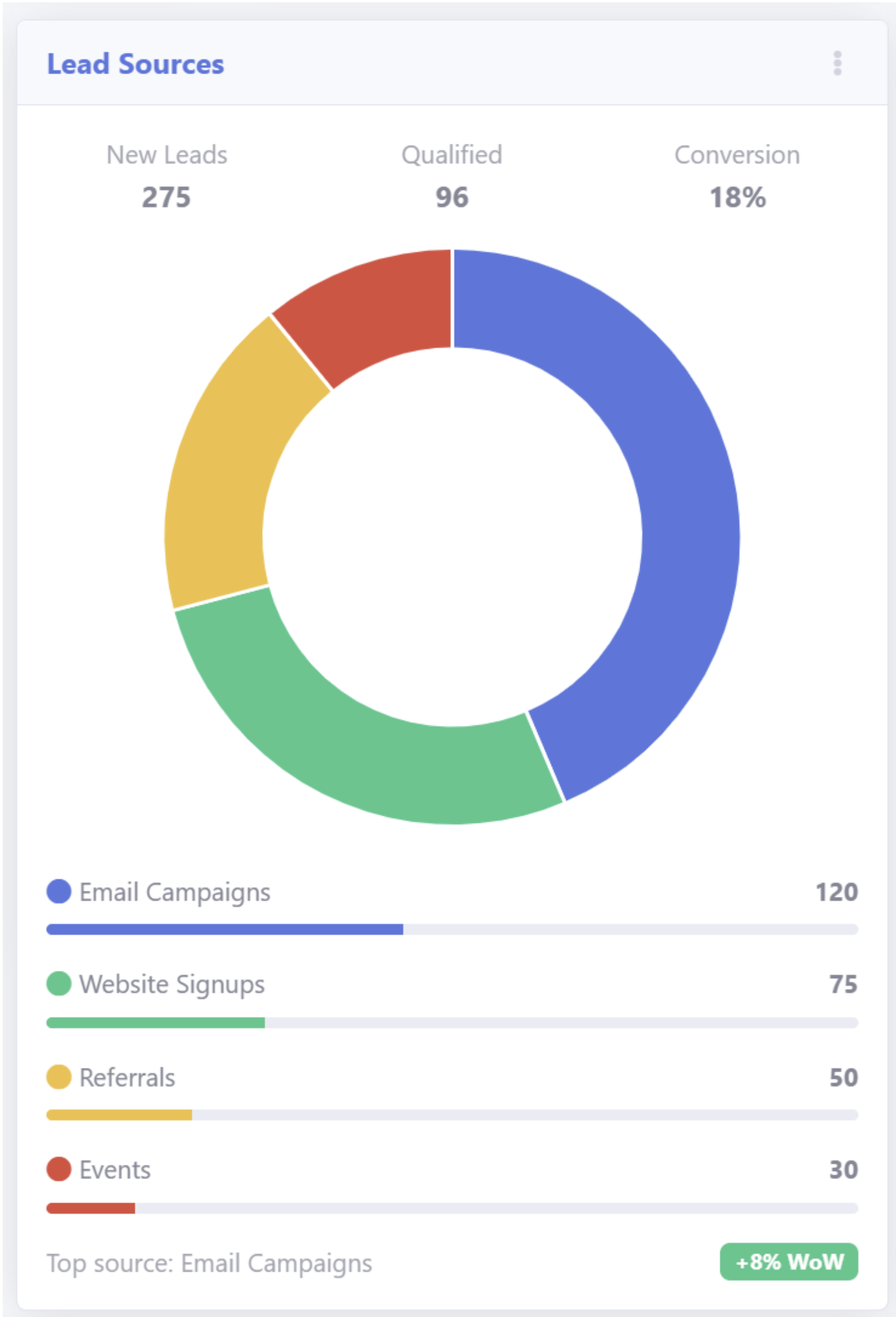


The upper portion of the Dashboard features four key performance indicator (KPI) cards arranged horizontally across the page. Moving from left to right, users first see the **Earnings (Monthly)** card displaying current month revenue with a calendar icon, followed by the **Earnings (Annual)** card showing year-to-date revenue with a dollar sign icon. Subsequently, the **Tasks** card presents completion progress as a visual percentage bar, and finally, the **Pending Requests** card indicates the number of items awaiting action with a comments icon. Each card uses distinct color coding along its left border—primary blue, success green, info cyan, and warning yellow respectively—to facilitate quick visual scanning. The specific figures displayed on these cards vary by user and are updated dynamically based on real-time data.

Analytics Dashboard Section

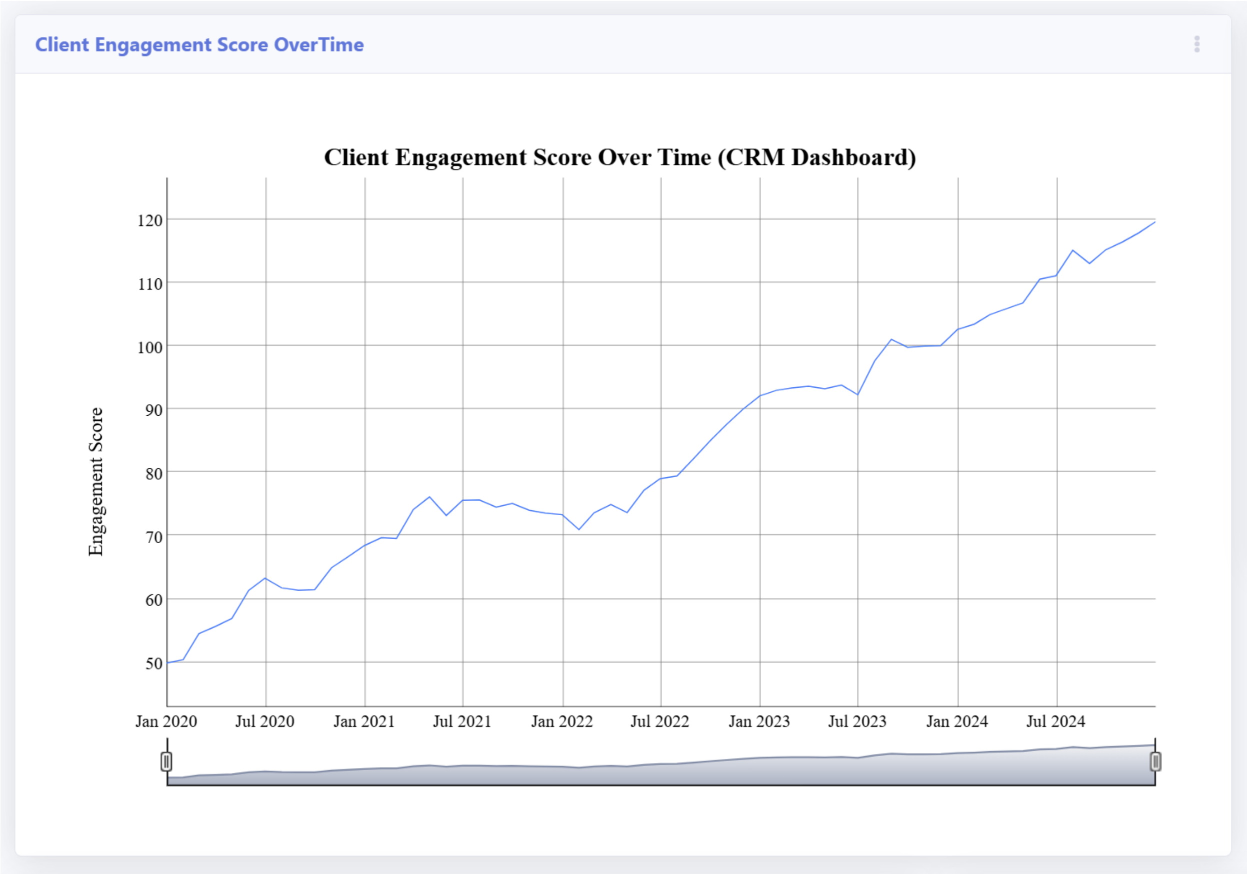


Below the summary cards, the page displays two primary visualization panels arranged side by side. On the left, occupying approximately 60% of the width, the **Earnings Overview** chart presents a dual-line graph comparing actual monthly earnings against target projections. At the top of this panel, users can toggle between MTD (Month-to-Date), QTD (Quarter-to-Date), and YTD (Year-to-Date) views using button controls, while a dropdown menu in the upper-right corner provides options to export CSV data, share the report, or refresh the display. Directly beneath these controls, a horizontal KPI strip shows four metrics: MTD Earnings, MoM Change (month-over-month percentage change), Average Deal Size, and Win Rate. The line chart itself features a blue shaded area representing actual earnings and a green dashed line indicating targets, with monthly labels along the x-axis from January through December. Below the chart, explanatory text notes the meaning of the visual elements, and status badges provide performance indicators and forecasts.



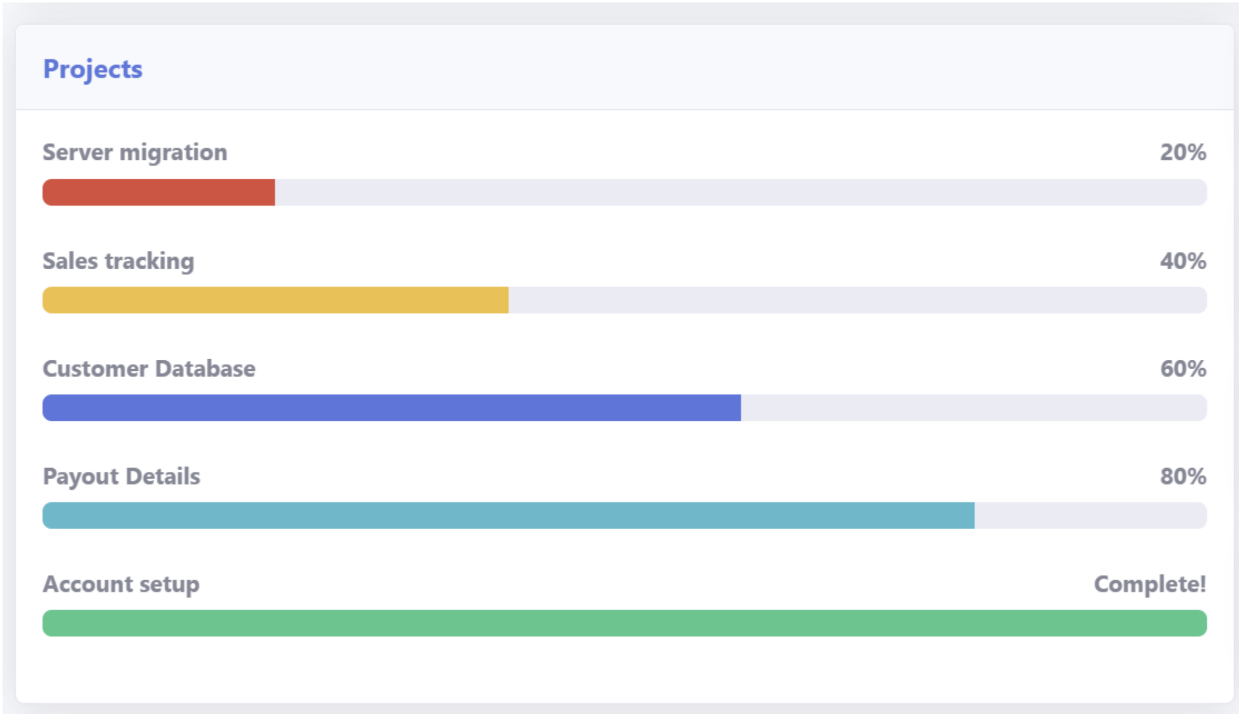
Adjacent to the earnings chart on the right side, the **Lead Sources** panel displays lead generation data through a doughnut chart and detailed breakdown. At the top of this card, mini KPI boxes show New Leads, Qualified leads, and Conversion rate. The circular doughnut visualization uses color-coded segments to represent four lead sources: Email Campaigns (blue), Website Signups (green), Referrals (yellow), and Events (red). Below the chart, each source is listed with a corresponding progress bar showing its proportion of total leads, accompanied by the numerical count. At the bottom of this panel, summary text identifies the top source alongside growth indicators. The specific numbers displayed vary by user based on their assigned leads and territory.

Client Engagement & Secondary Visualizations

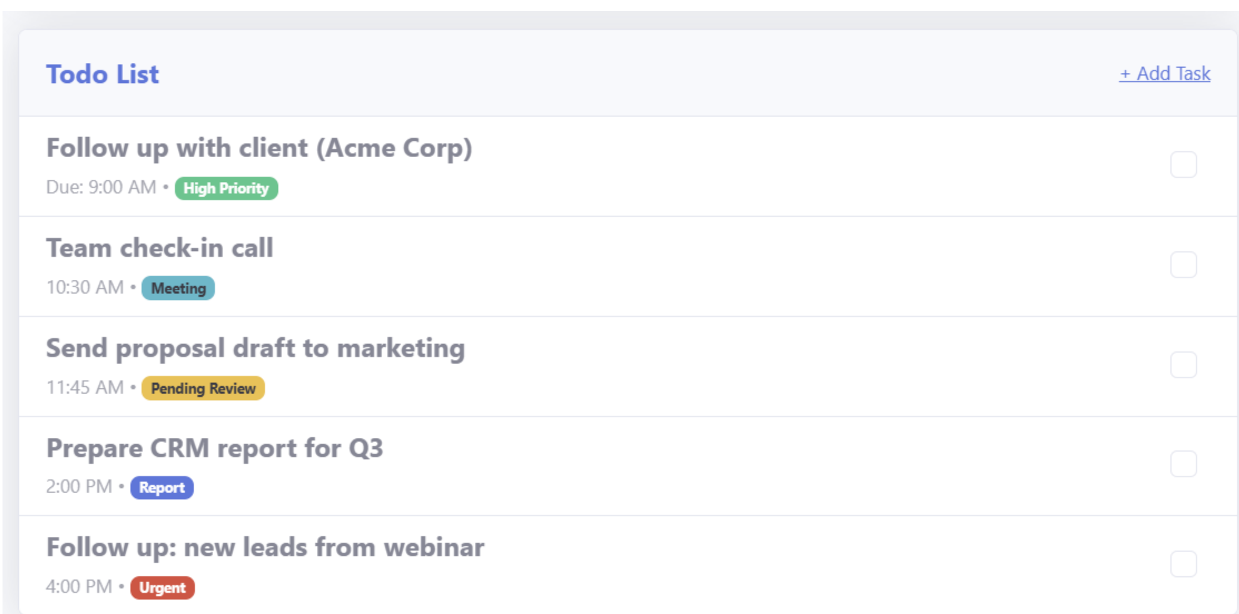


The second row of the Dashboard features the **Client Engagement Score Over Time** chart on the left, which is embedded as an iframe displaying dynamic engagement metrics tracked across time periods. This section includes the same dropdown menu options for actions such as exporting or refreshing data. On the right, an additional **Lead Sources** visualization provides consistent access to lead generation insights, maintaining the doughnut chart format with legend indicators below.

Project Tracking & Task Management

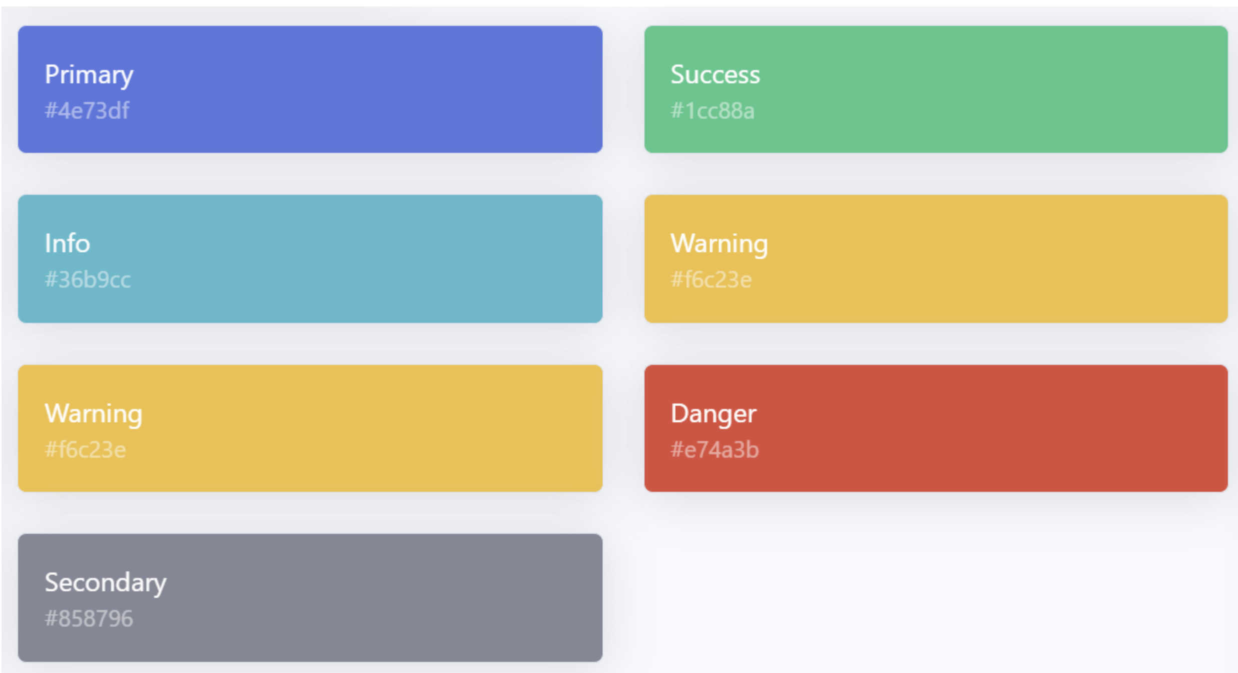


In the lower-left quadrant, the **Projects** card displays active initiatives with horizontal progress bars. Each project entry shows the project name on the left and completion percentage on the right, with color-coded progress indicators that vary by completion level. The projects listed include items such as Server Migration, Sales Tracking, Customer Database, Payout Details, and Account Setup, though the specific projects and their completion percentages vary by organization and user access.



Directly below the projects section, the **Todo List** card presents actionable tasks with checkboxes for completion tracking. At the top of this card, a "+ Add Task" link enables quick task creation. Each todo item is structured with a task title in bold, followed by timing details and a color-coded priority badge. For instance, tasks may show due times along with priority levels indicated by badges in various colors (green for high priority, blue for meetings, yellow for pending review, red for urgent). The checkbox for each task appears on the right side, allowing users to mark items complete. The specific tasks displayed are unique to each user based on their role and assignments.

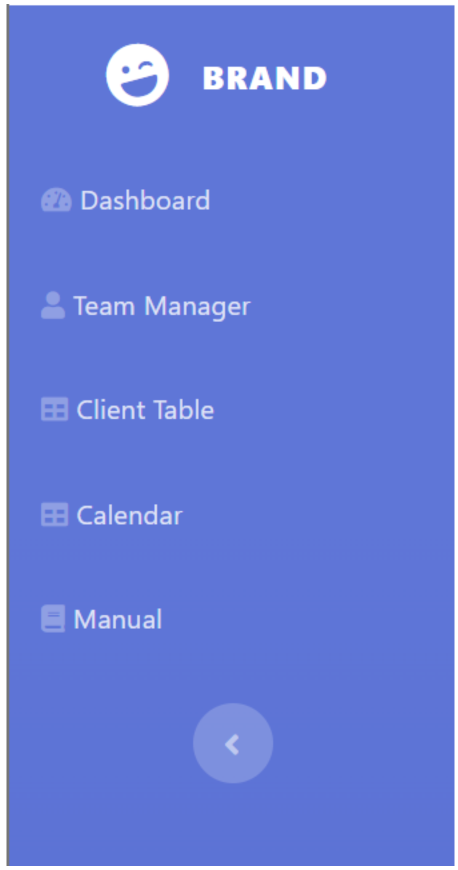
Color Reference Cards



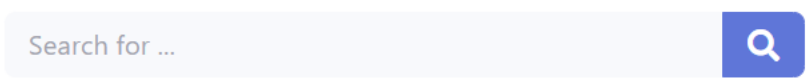
In the lower-right section, a grid of color swatch cards provides quick reference to the CRM's visual design system. These cards display color names (Primary, Success, Info, Warning, Danger, Secondary) in white text against their respective background colors, with hex codes shown below each name.

Functional Actions

Navigation Actions

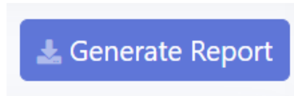


- **Sidebar Toggle** (Located on left sidebar): Collapses or expands the navigation menu. Once clicked, the system slides the sidebar out of view while maintaining access through a menu icon.



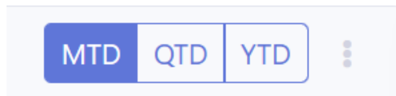
- **Search Field** (Top navigation bar): Allows users to enter search queries. After typing and pressing enter or clicking the search button, the system displays relevant results.

- **Manual Link** (In left sidebar, conditionally visible): Navigates to the Employee User Manual page. This link appears only for users with usernames containing "-GRPA" or "-GRPB" designation.



- **Generate Report Button** (Top-right of page header): Initiates the report generation process. When clicked, the system prompts users to configure report parameters before generating output.

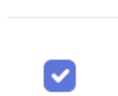
Chart Interaction Actions



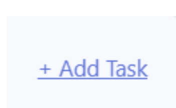
- **Time Range Toggles** (MTD/QTD/YTD buttons in Earnings Overview): Switches the earnings chart display between Month-to-Date, Quarter-to-Date, and Year-to-Date views. The active button displays with filled styling while inactive buttons remain outlined, and the chart data refreshes without requiring a full page reload.

- **Chart Dropdown Menu** (Ellipsis icon in chart headers): Reveals options including "Export CSV," "Share Report," and "Refresh." Selecting an option executes the corresponding action such as file download, sharing interface, or data reload.

Task Management Actions



- **Task Checkboxes** (Right side of each todo item): Marks tasks as complete when checked. Once clicked, the system updates the task status in the database.

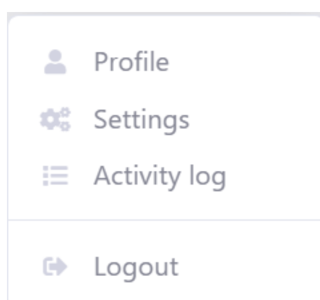


- **Add Task Link** (Top-right of Todo List): Opens an interface for creating new tasks. Users can enter task details including title, due date, and priority level before saving.

Notification Actions

- **Alerts Bell Icon** (Top navigation bar): Displays a dropdown of recent system notifications. A badge counter appears when unread alerts exist. Each notification entry is clickable and navigates to the relevant page or record.

- **Messages Envelope Icon** (Top navigation bar): Opens a dropdown showing recent direct messages. A badge counter indicates unread messages. Clicking individual messages navigates to the full conversation.



- **User Profile Dropdown** (Top-right corner with avatar image): Displays user-specific options including Profile, Settings, Activity Log, and Logout. Selecting an option navigates to the corresponding page or executes the action.

Workflow & Process Integration

The Dashboard functions as the starting point for daily CRM activities, establishing context before users navigate to specific modules. Upon login, users review the summary cards to assess key metrics and determine if any areas require immediate attention. Subsequently, users can examine the detailed charts to understand performance trends and identify patterns. When specific issues or opportunities are identified, users then navigate to relevant functional pages such as the Client Table, Team Manager, or Calendar to take action. As a result, the Dashboard serves as a navigation hub that directs users to appropriate areas based on displayed data.

The Todo List component integrates with other system functions, allowing users to track action items that may originate from various sources throughout the CRM. After reviewing information on the Dashboard, users can add tasks to ensure follow-up occurs, which then appear in both the Todo List and Calendar views where applicable. This enables coordination between planned activities and actual execution.

Error Handling & Validation

Chart Loading Errors

Error Message: "Unable to load chart data. Please refresh the page or contact support if the problem persists."

Trigger Condition: This error appears when chart visualizations fail to retrieve data from the server, typically due to network connectivity issues or server problems.

Resolution Steps: Click the Refresh option in the chart dropdown menu to retry the data request. If the error persists, verify your internet connection and clear your browser cache. If these steps do not resolve the issue, contact your system administrator.

Task Creation Errors

Error Message: "Task title is required."

Trigger Condition: If users attempt to submit the Add Task form without entering text in the title field, then the system will display this validation message below the empty field.

Resolution Steps: Enter a task title in the required field before attempting to save. The system prevents submission until this field contains valid data.

Search Errors

Error Message: Error messages may appear if the search function encounters issues processing the query.

Trigger Condition: When the search field input causes a processing error or returns no results, the system may display relevant feedback.

Resolution Steps: Verify that the search terms are spelled correctly and try alternative keywords. If problems persist, contact support.

Tips & Best Practices

To maximize efficiency, use the time range toggles (MTD/QTD/YTD) on the Earnings Overview chart to view data at different scales and identify both short-term and long-term trends. Users should note that toggling between these views provides different perspectives on performance without requiring navigation to separate pages.

When managing the Todo List, review tasks at the start of each day to prioritize activities based on due times and priority badges. Additionally, use the checkbox functionality to mark completed items, which helps maintain an accurate view of remaining work and contributes to activity tracking within the system.

For best results when analyzing charts, use the dropdown menus to access export functionality when you need to perform deeper analysis in external tools or share data with team members. Furthermore, the Refresh option in chart dropdowns ensures you are viewing the most current data available.

Users should note that the sidebar toggle can be used to maximize screen space when focusing on chart details or when working on devices with smaller displays. Similarly, the color reference cards in the lower-right section serve as a quick guide for understanding the visual coding system used throughout the CRM interface.

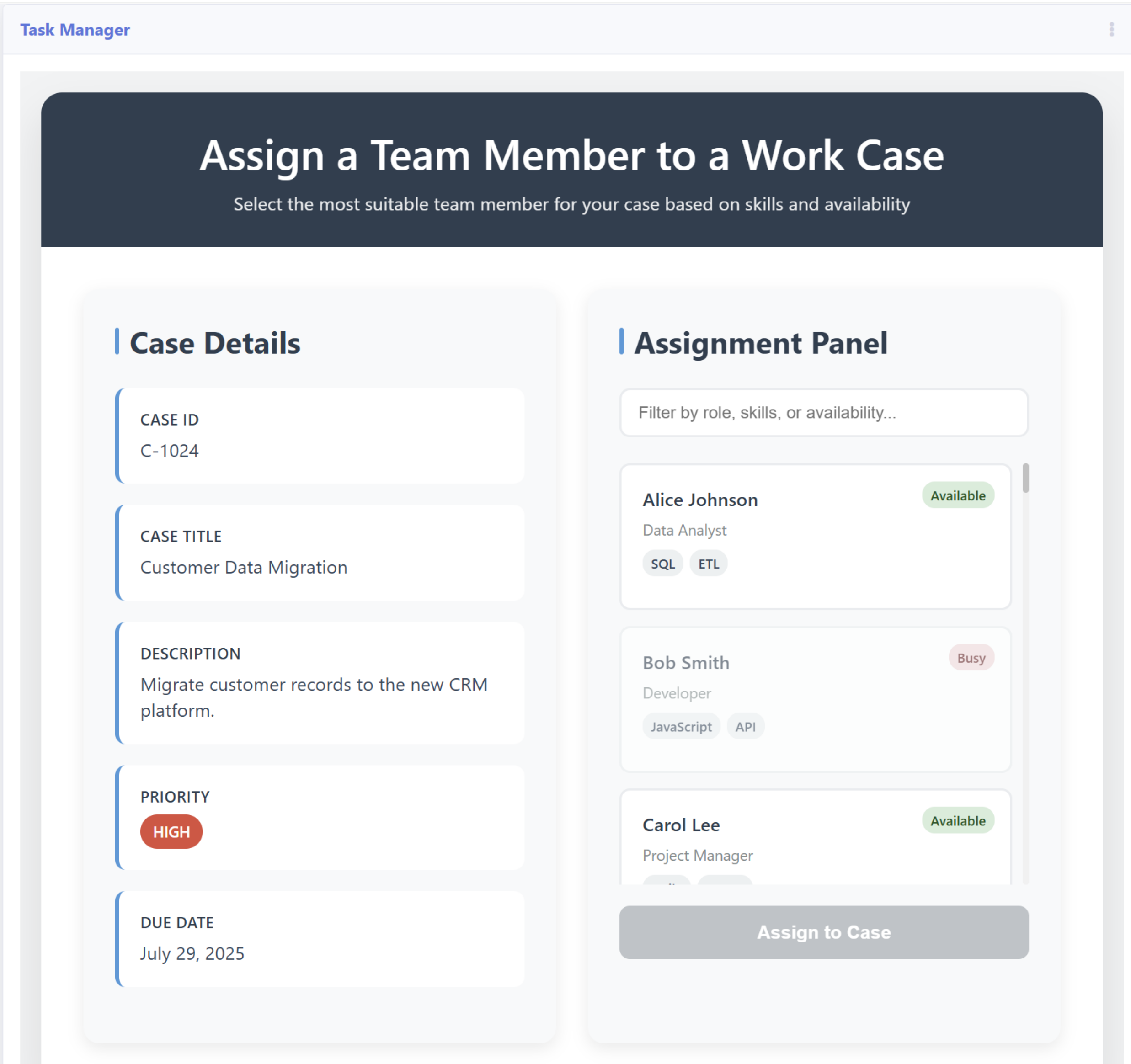
Assign Team Member to Work Case (Team Assignment)

URL: https://crmsystemaistmarytx.onrender.com/profile/

Purpose

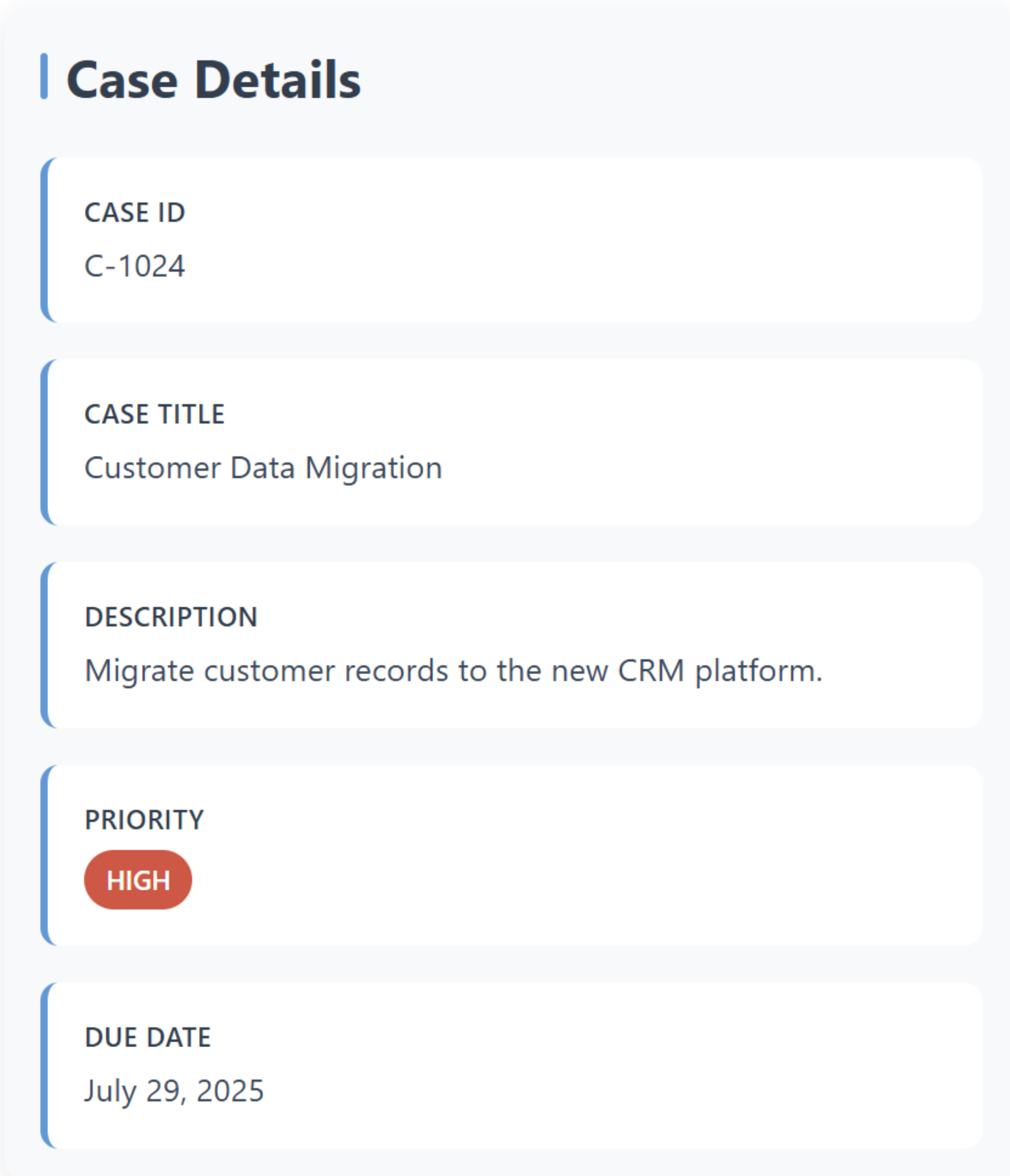
The Assign Team Member to Work Case page serves as a specialized interface for matching team members with work cases based on skills, roles, and availability. Specifically, this page enables managers and team leads to review case requirements, filter available team members by relevant criteria, and assign the most suitable person to handle specific work cases. In particular, project managers, team leads, and resource coordinators access this page to ensure optimal task allocation and workload distribution across the team.

Page Layout & Navigation



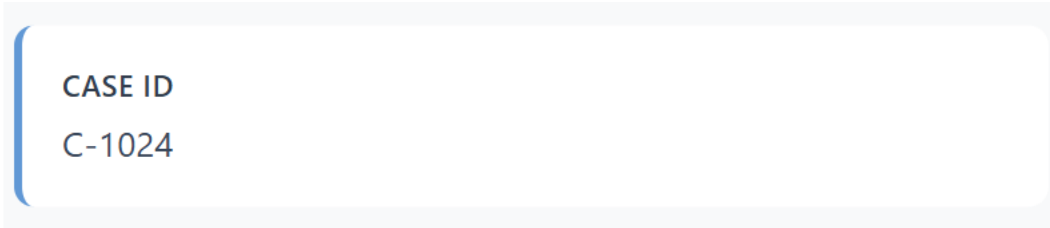
At the top of the page, a dark header banner displays the page title "Assign a Team Member to a Work Case" along with a descriptive subtitle explaining the page's purpose. Below the header, the main content area is organized into a two-column grid layout that divides the screen into equal sections. On the left side, the **Case Details** section displays information about the work case requiring assignment. On the right side, the **Assignment Panel** section contains team member filtering tools, a scrollable list of available team members, and assignment controls. The page uses a clean, card-based design with rounded corners and subtle shadows to distinguish each major section.

Case Details Section

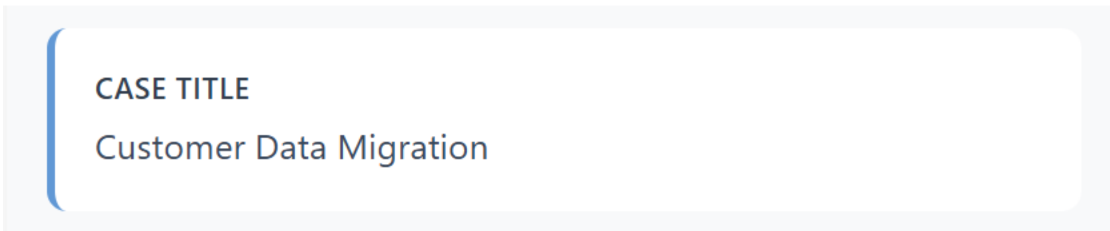


The **Case Details** section occupies the left column and presents information about the work case in a vertically stacked layout. This section contains multiple field cards, each displaying a specific piece of case information. The fields appear in a consistent format with a label at the top and the corresponding value below.

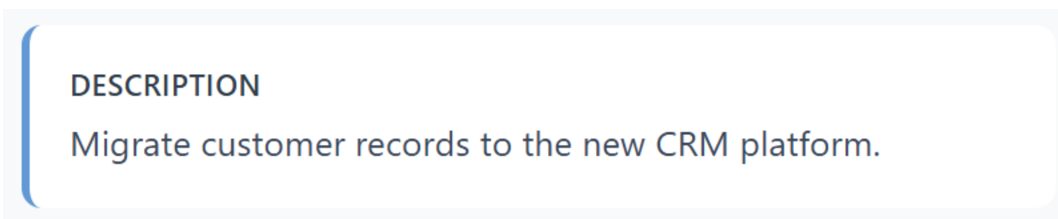
Case Information Fields



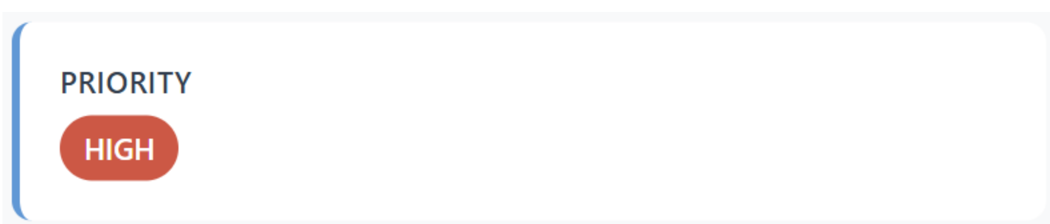
- **Case ID** (Text field, Read-only): Displays the unique identifier for the work case. The value appears as alphanumeric text following a standard format.



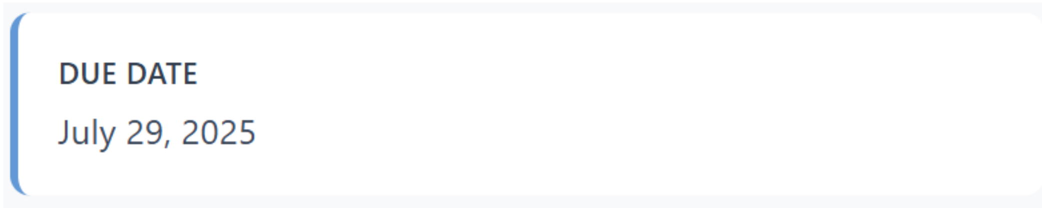
- **Case Title** (Text field, Read-only): Shows the brief title or name of the work case. This field provides a quick reference to the nature of the assignment.



- **Description** (Text field, Read-only): Contains a detailed explanation of the work case requirements and objectives. This field helps users understand what the assignment entails.



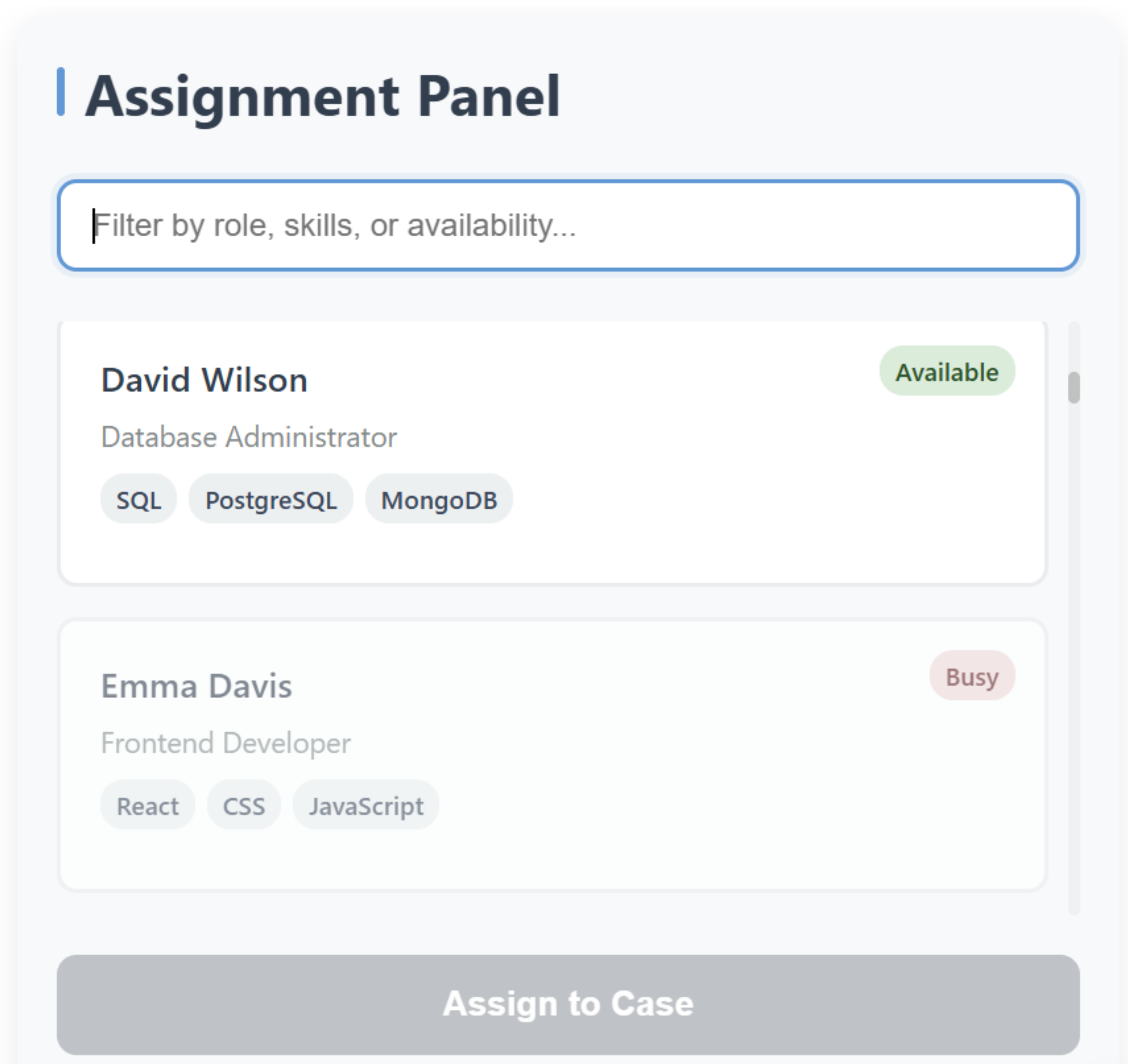
- **Priority** (Badge indicator, Read-only): Displays the urgency level of the work case using a colored badge. The priority appears as "High," "Medium," or "Low" with corresponding color coding—red for high priority, orange/yellow for medium priority, and green for low priority.



- **Due Date** (Date field, Read-only): Shows the deadline for completing the work case. The date appears in a formatted display (Month Day, Year format).

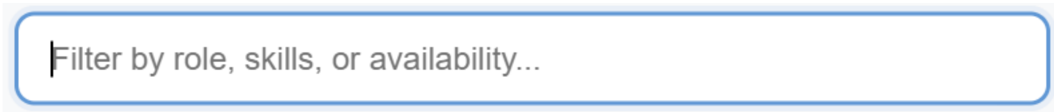
All fields in the Case Details section are read-only and serve informational purposes only, providing context for the assignment decision.

Assignment Panel Section



The **Assignment Panel** section occupies the right column and contains interactive elements for selecting and assigning team members. This section is organized vertically with a filter input at the top, followed by the team member list, and assignment controls at the bottom.

Filter Section



At the top of the Assignment Panel, a text input field labeled with placeholder text "Filter by role, skills, or availability..." allows users to narrow down the displayed team members. The filter field spans the full width of the panel and features a rounded border that highlights when active.

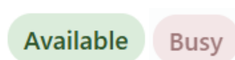
Filter Input Field:

- **Field Type:** Text input
- **Required/Optional:** Optional
- **Validation Rules:** Accepts any text input; performs real-time filtering as users type
- **Dependencies:** Directly affects which team members appear in the list below; filtering updates dynamically without requiring a submit action

Team Members List

Below the filter section, a scrollable area displays team member cards arranged vertically. Each team member card contains consistent information presented in a structured format:

Team Member Card Components:



- **Availability Badge** (Top-right corner): Displays "Available" in green or "Busy" in red, indicating current assignment status

- **Member Name** (Bold text, prominently displayed): Shows the full name of the team member

- **Role** (Secondary text): Indicates the team member's job title or functional role

- **Skills Section** (Tag display): Lists relevant skills as small, rounded badge tags; multiple skills appear on the same line and wrap as needed

The team member cards use visual indicators to communicate status:

- Available team members appear with full opacity and can be selected
- Busy team members appear with reduced opacity (approximately 60% transparency) and cannot be selected
- Selected team members display with a blue border and light blue background tint

The list area includes a custom scrollbar when the number of team members exceeds the visible space, allowing users to view all options without expanding the panel height.

Assignment Controls

At the bottom of the Assignment Panel, below the team member list, two key elements facilitate the assignment process:

Assign to Case Button:

- **Field Type:** Button
- **Required/Optional:** Action required to complete assignment
- **Validation Rules:** Button remains disabled (grayed out) until a team member is selected; button text updates to show selected member's name when active
- **Dependencies:** Requires selection of an available team member; button state changes based on selection status

Message Area:

- **Field Type:** Dynamic notification display

- **Function:** Displays success or error messages following assignment actions; appears below the assign button when triggered; automatically dismisses after several seconds

Functional Actions

Filter Actions

- **Filter Input** (Text field at top of Assignment Panel): Accepts text input to filter the team member list. As users type, the system searches team member names, roles, skills, and availability status, displaying only matching results. The filter operates in real-time without requiring a submit action, and clearing the filter field restores the full team member list.

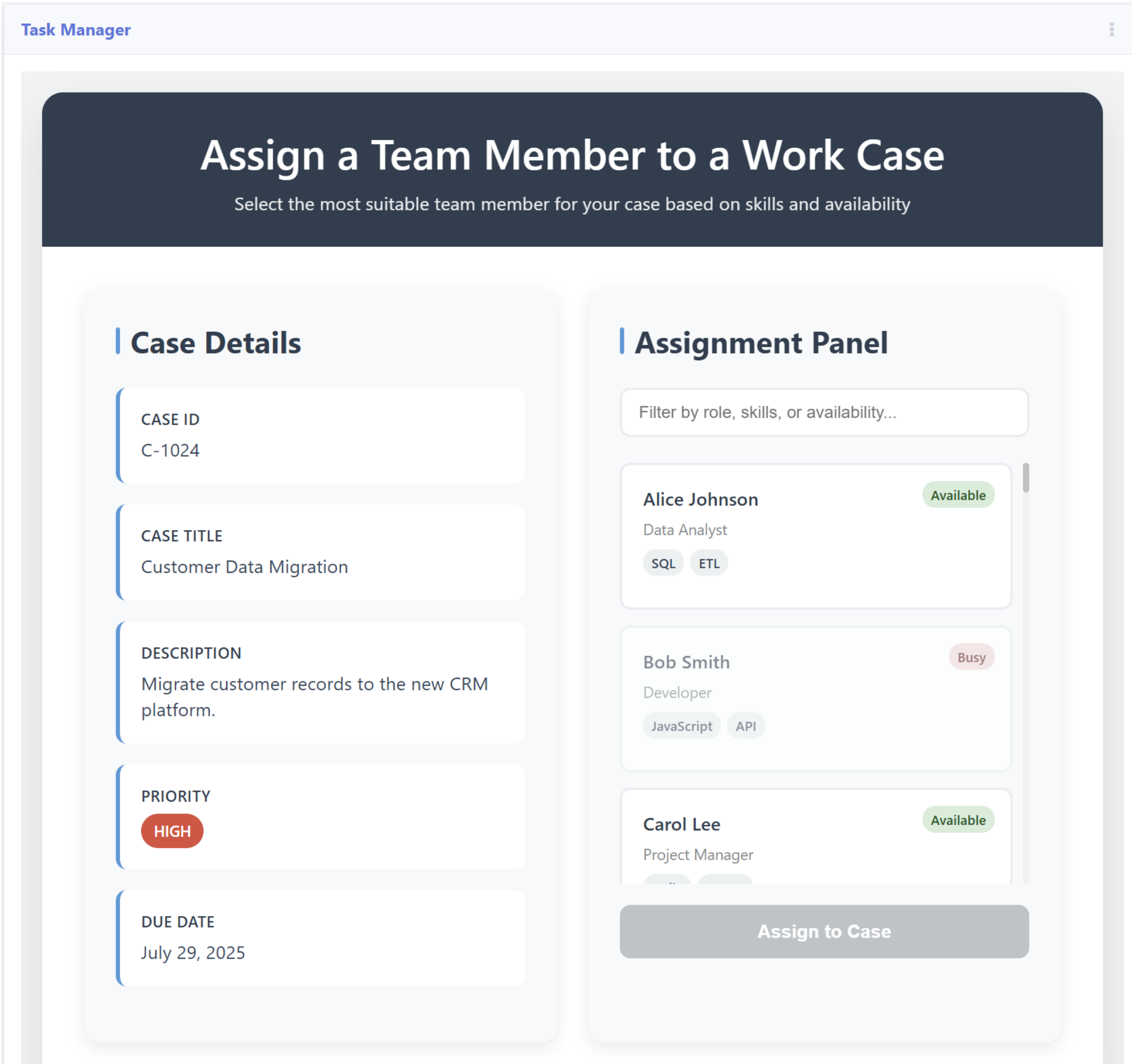
Selection Actions

- **Team Member Card Click** (Anywhere within an available team member card): Selects the team member for assignment. Once clicked, the system highlights the selected card with a blue border and light blue background, deselects any previously selected member, and enables the assignment button with updated text showing the selected member's name. Users cannot select team members marked as "Busy," as these cards are non-interactive.

Assignment Actions

- **Assign to Case Button** (Bottom of Assignment Panel): Completes the assignment process. When clicked, the system assigns the selected team member to the work case, updates the team member's availability status from "Available" to "Busy," displays a success message confirming the assignment, and resets the selection state. After completion, users can make additional assignments if needed, and the newly assigned member now appears with "Busy" status in the team member list.

Workflow & Process Integration



The Assign Team Member to Work Case page functions as a critical resource allocation tool within the broader project management workflow. Users typically access this page after identifying work cases that require team member assignment, often navigating from task management interfaces, project dashboards, or case tracking systems. Subsequently, managers review the case details to understand requirements, then use the filtering capabilities to identify team members with appropriate skills and availability. Once a suitable match is identified and assigned, the system updates team member availability status, ensuring that resource allocation remains accurate across the organization. As a result, this page enables efficient distribution of work while preventing over-allocation of team members and ensuring skill-appropriate task assignments.

The assignment process integrates with availability tracking systems, automatically updating team member status when assignments are made. This then enables other managers and coordinators to see real-time availability information when making their own assignment decisions, preventing conflicts and double-booking of resources.

Error Handling & Validation

Selection Errors

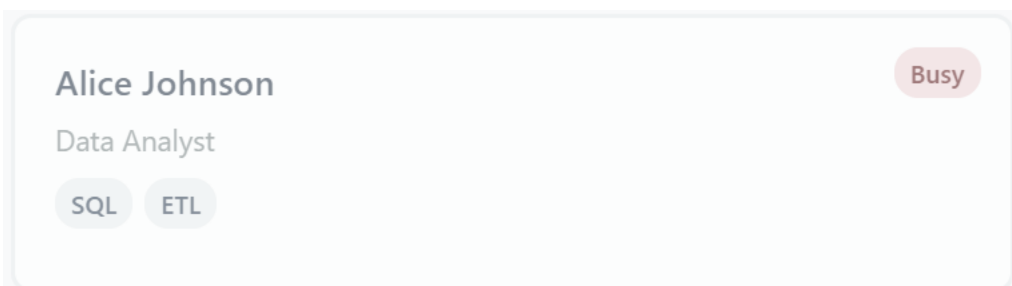
Error: Grayed-out button "Assign to Case."

Trigger Condition: If users attempt to click the Assign to Case button without first selecting a team member from the list, then the system will display this error message.

Resolution Steps: Select an available team member by clicking on their card in the team member list. The card will highlight with a blue border when properly selected, and the assignment button will become active.

Availability Errors

Error: Team member not available to be assigned a task.

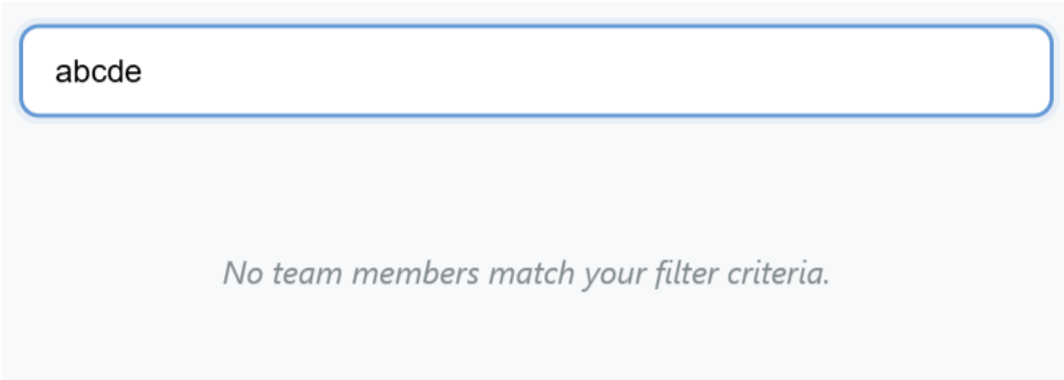


Trigger Condition: This error appears if the system detects that a previously available team member's status has changed to "Busy" between selection and assignment attempt.

Resolution Steps: Select a different team member who is currently marked as "Available" in the team member list. Refresh the page if availability statuses appear outdated.

Filter Errors

Error Message: "No team members match your filter criteria." (Displayed within the team member list area)



Trigger Condition: When the filter input contains text that does not match any team member names, roles, skills, or availability statuses, the system displays this message in place of the team member cards.

Resolution Steps: Clear or modify the filter text to use different search terms. Try searching for broader terms or partial matches. Clear the filter field entirely to restore the full team member list.

Tips & Best Practices

To maximize efficiency, use the filter input to quickly narrow down team members by entering relevant skills required for the case. For example, if the case involves database work, filter by "SQL" or "Database" to immediately see qualified candidates. Users should note that the filter searches across multiple fields simultaneously, including names, roles, skills, and availability status.

For best results when making assignment decisions, review both the team member's role and skills list to ensure alignment with case requirements. Additionally, pay attention to the priority level indicated by the colored badge in the Case Details section, as high-priority cases may require team members with specific experience or availability for immediate work.

When filtering produces no results, try using shorter search terms or single keywords rather than complete phrases. Furthermore, the availability badges update in real-time as assignments are made, so refreshing the page ensures you are viewing current team member status information.

Users should note that once a team member is assigned and their status changes to "Busy," they will no longer appear as selectable options for subsequent assignments until their availability status is updated through other system processes. Similarly, the assignment action completes immediately upon clicking the button, so ensure you have selected the correct team member before confirming the assignment.

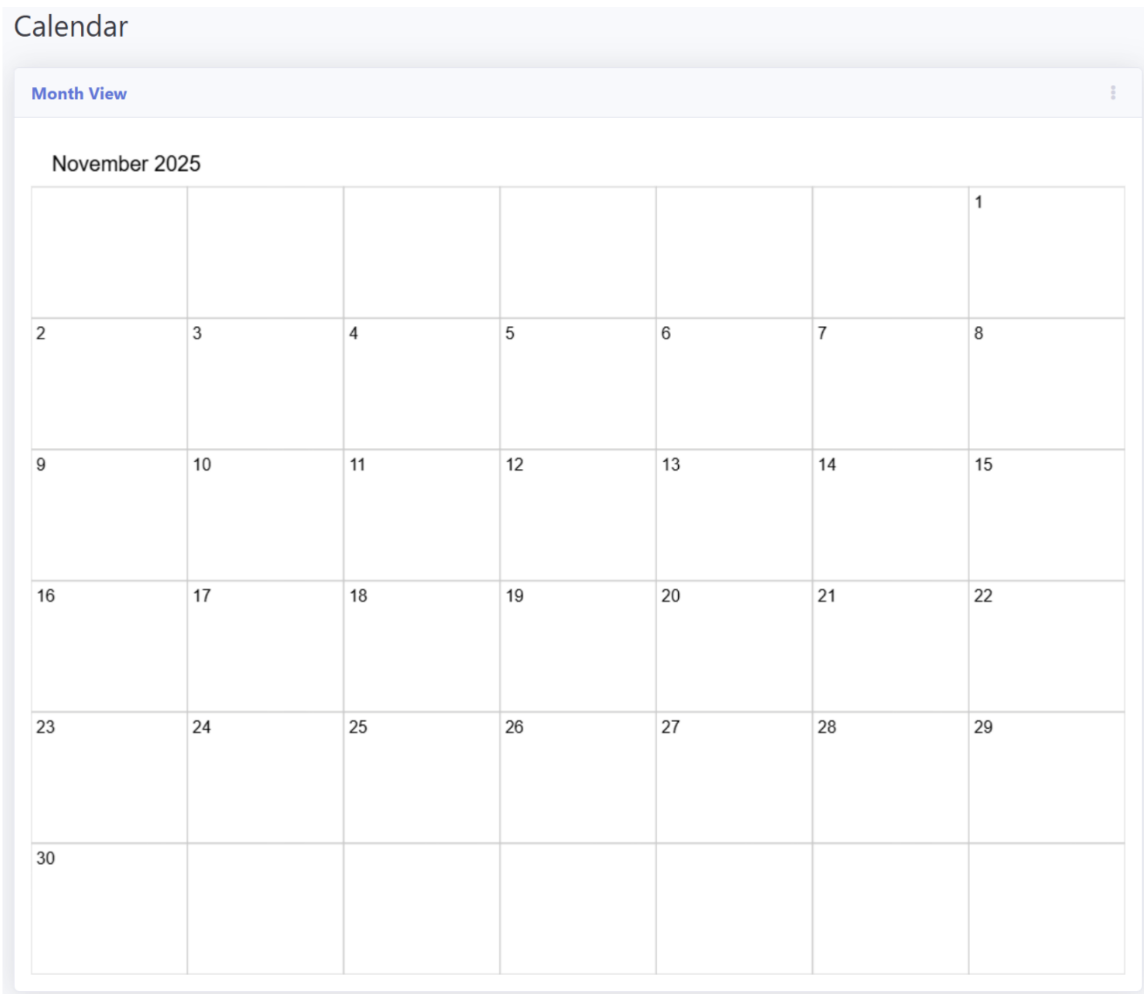
Canvas Calendar (Event Scheduling)

URL: https://crmsystemaistmarytx.onrender.com/calendar2/

Purpose Statement

The Canvas Calendar page serves as an interactive scheduling interface where users can view monthly events, create new calendar entries, and manage existing appointments through a visual grid layout. Specifically, this page enables team members to add events with time specifications, detect scheduling conflicts, and organize activities across the month by dragging and dropping event blocks. In particular, individual contributors, team coordinators, and managers access this page to maintain their schedules, coordinate meetings, and track upcoming activities.

Page Layout & Navigation



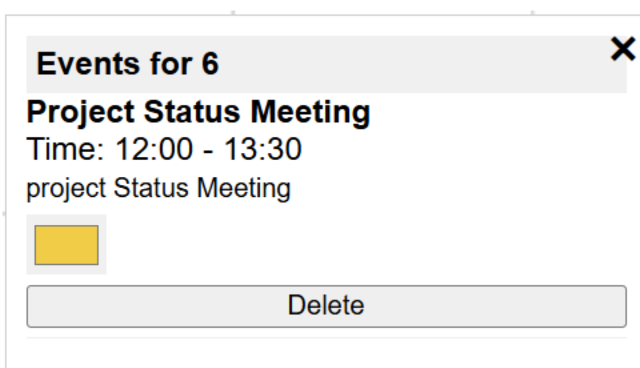
The page displays a full-screen canvas-based calendar interface with minimal chrome or navigation elements. At the top of the page, the current month and year appear as a header label positioned on the left side. Below this header, the main calendar grid occupies the entire viewport, organized into seven columns representing days of the week and up to six rows representing weeks of the month. Each cell in the grid corresponds to a single day and displays the day number in the upper-left corner, followed by any scheduled events for that day. The calendar uses a clean, grid-based design with light gray borders separating individual day cells, and each event appears as a colored rectangular block within its corresponding day cell.

Calendar Grid Display

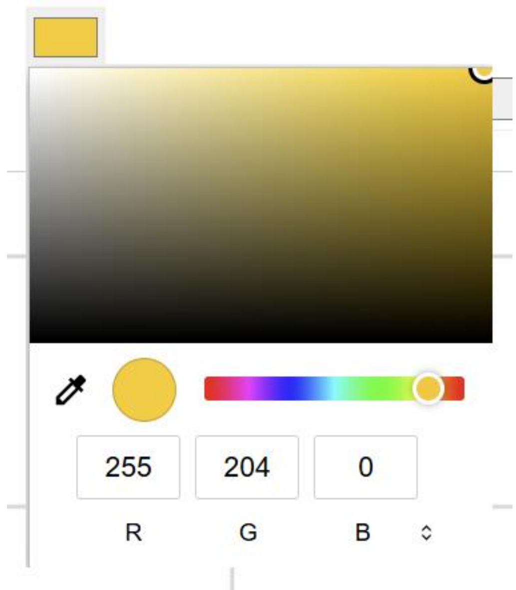
The calendar grid presents days of the current month arranged in a standard weekly format. Days from the previous or next month do not appear in the grid—only the cells for the current month contain day numbers and event information. Within each day cell, events are stacked vertically below the day number, with each event occupying approximately one-third of the cell height. Events display with colored backgrounds that vary by event type, and each event block shows the start time followed by the event title in a single line of text. When multiple events exist for a single day, they appear in chronological order from top to bottom within the cell.

Event Information Display

Each event block within the calendar contains the following visible information:



- **Start Time**: Displayed in 24-hour format (HH:MM) at the beginning of the event label
- **Event Title**: Appears immediately after the start time on the same line



- **Background Color**: The entire event block displays with a solid color background that identifies the event category or type

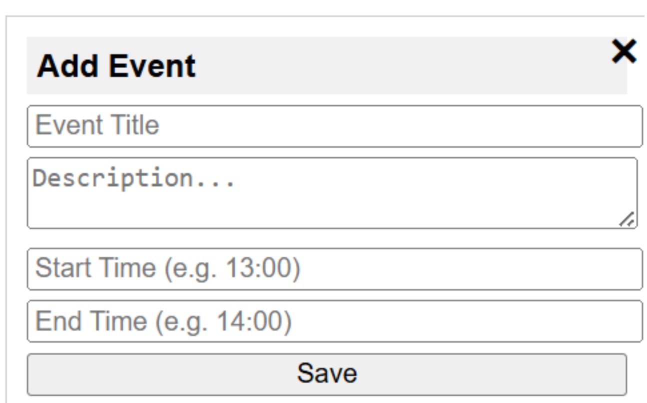
Event details such as descriptions and end times are not visible on the main calendar grid but can be accessed through interaction with specific events.

Functional Actions

Calendar Navigation Actions

The calendar displays the current month by default. Month and year information appear at the top of the page, though specific navigation controls for changing months are handled through the underlying interface implementation.

Event Creation Actions



- **Single Click on Day Cell** (Anywhere within an empty area of a day cell): Opens the event creation editor. Once clicked, the system displays a popup dialog containing input fields for event details. The editor appears as a floating window that can be repositioned on screen, and users can enter event information including title, description, start time, and end time.

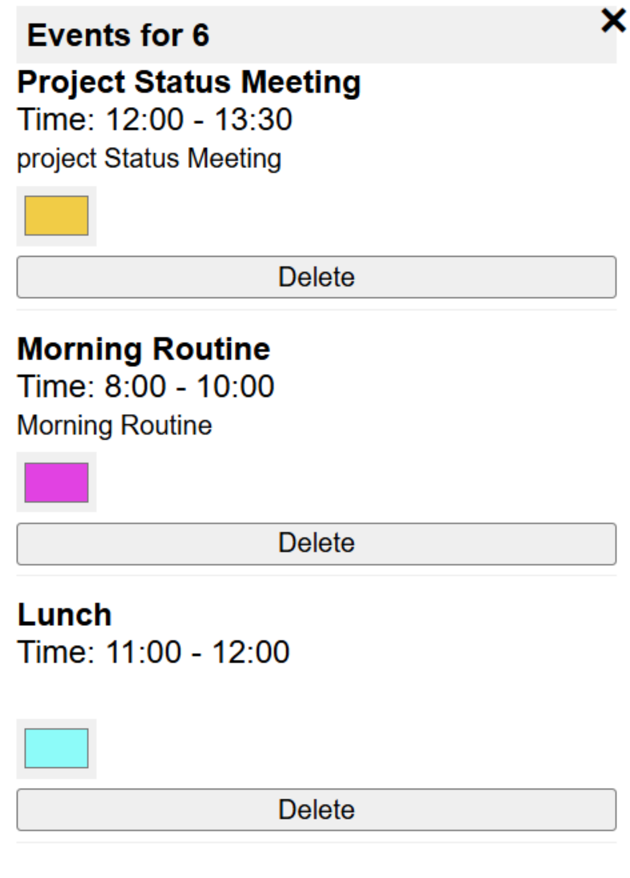
Event Editor Input Fields:

- **Event Title** (Text input, Required): Accepts the name or subject of the event. The field displays placeholder text "Event Title" when empty.
- **Description** (Textarea, Optional): Allows users to enter additional details about the event. The field displays placeholder text "Description..." when empty and expands to accommodate multiple lines of text.
- **Start Time** (Text input, Required): Accepts time in 24-hour format (e.g., "13:00" for 1:00 PM). The field displays placeholder text "Start Time (e.g. 13:00)" to guide proper formatting.
    - **Validation Rules:** Must follow HH:MM format
    - **Dependencies:** Used to detect scheduling conflicts with existing events
- **End Time** (Text input, Required): Accepts time in 24-hour format. The field displays placeholder text "End Time (e.g. 14:00)" to guide proper formatting.
    - **Validation Rules:** Must follow HH:MM format
    - **Dependencies:** Used to calculate event duration and detect scheduling conflicts
- **Save Button** (Action button at bottom of editor): Attempts to save the new event. When clicked, the system validates the input, checks for scheduling conflicts with existing events on the same day, and either saves the event immediately or displays a conflict warning dialog.
- **Close Button** (X icon in editor header): Closes the event editor without saving. When clicked, the editor window disappears and any entered information is discarded.

Event Viewing Actions

- **Double Click on Day Cell** (Anywhere within a day cell containing events): Opens a detailed view of all events for that day. Once activated, the system displays a popup listing each event with its title, time range, description, and additional controls. This popup appears as a floating window with a header showing "Events for [day number]" and can be repositioned on screen.

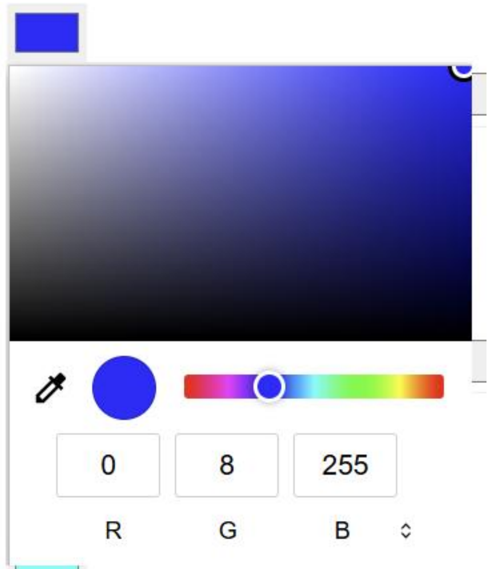
Event Detail Popup Components:



For each event displayed in the popup:

- **Event Title**: Shown in bold text
- **Time Range**: Displays as "Time: [start time] - [end time]"
- **Description**: Appears below the time range in smaller text
- **Color Picker**: An input control allowing users to change the event's background color
- **Delete Button**: Removes the event from the calendar

Event Modification Actions



- **Color Picker** (Within event detail popup): Changes the background color of the event. When users select a new color, the system immediately updates the event's display color on the calendar grid.
    - **Field Type:** Color input
    - **Function:** Updates the visual appearance of the event block
    - **Resulting Behavior:** Calendar refreshes to show the new color; popup remains open

- **Delete Button** (Within event detail popup): Permanently removes the event from the calendar. Once clicked, the system deletes the event, refreshes the calendar display, and closes the event detail popup.
    - **Prerequisites:** Event must exist in the calendar
    - **Resulting Behavior:** Event disappears from calendar grid; popup closes automatically
- **Event Drag and Drop** (Click and hold on event block, then drag): Moves the event to a different day. Users click directly on an event block in the calendar grid, hold the mouse button, drag to a different day cell, and release to complete the move. The system updates the event's date to reflect its new position while maintaining all other event details including time and description.

Conflict Resolution Actions

Conflicts do not allow for New Events to be saved on the same date or time. If the Add Event does not save, check for conflicting events delete or reschedule events and recreate your new event.

Popup Management Actions

All popup windows (event editor, event detail view, conflict dialog) include:

- **Draggable Header Bar**: Users can click and hold the header area to reposition the popup window anywhere on the screen
- **Close Button**: The X icon in the upper-right corner closes the popup without taking any action

Workflow & Process Integration

The Canvas Calendar functions as a personal scheduling tool within the broader CRM workflow. Users typically access this page to coordinate meeting times, block out availability, and track upcoming activities that relate to client interactions or internal team coordination. Subsequently, when scheduling client meetings or planning project milestones, users create calendar events to establish commitments and ensure time is allocated appropriately. The calendar's conflict detection feature helps prevent double-booking by alerting users when new events overlap with existing commitments. As a result, this page supports effective time management and helps users maintain organized schedules while coordinating with broader team activities tracked elsewhere in the CRM system.

The drag-and-drop functionality enables quick rescheduling without requiring users to delete and recreate events, facilitating responsive schedule adjustments when priorities shift or conflicts arise. This then enables users to maintain current schedules with minimal effort, ensuring the calendar remains an accurate representation of planned activities.

Error Handling & Validation

Time Format Errors

Error Message: The system may display validation feedback if time inputs do not follow the required HH:MM format.

Trigger Condition: When users enter start or end times in formats other than 24-hour HH:MM notation (e.g., entering "1pm" instead of "13:00").

Resolution Steps: Enter times using 24-hour format with a colon separator. For example, use "09:00" for 9:00 AM or "14:30" for 2:30 PM. Ensure both hours and minutes include two digits.

Scheduling Conflict Warnings

Error: There's a potential conflict with an existing event.

Trigger Condition: If users attempt to save an event with a start or end time that overlaps with another event on the same day, then the system will display this conflict warning in a popup dialog.

Resolution Steps: Review the existing events for the selected day by double-clicking the day cell to see all scheduled activities. Either modify the new event's start and end times to avoid overlap, or click OK in the conflict dialog to proceed with creating the overlapping event. In cases where the conflict is acceptable (such as tentative events or events in different locations), clicking OK allows both events to exist on the calendar.

Missing Required Fields

Error Message: The system prevents saving events when required fields are empty, though specific error messages may vary.

Trigger Condition: When users attempt to save an event without entering values in the Event Title, Start Time, or End Time fields.

Resolution Steps: Complete all required fields before clicking the Save button. Ensure the Event Title contains a descriptive name for the event and both time fields use the proper HH:MM format. The Description field is optional and can remain empty.

Tips & Best Practices

To maximize efficiency, use the single-click action to quickly add events and the double-click action to review or modify existing events on busy days. Users should note that these are distinct interactions—single clicks open the new event editor while double clicks open the event list for that day.

For best results when entering event times, always use 24-hour format with leading zeros. For example, enter "09:00" for 9:00 AM rather than "9:00," as this ensures consistency and proper conflict detection. Furthermore, the conflict detection system compares time strings, so maintaining consistent formatting helps the system accurately identify overlapping events.

When creating events with specific time ranges, pay attention to the conflict warning dialog if it appears. Additionally, you can use the color picker feature to visually categorize events by type, making it easier to distinguish between different kinds of activities at a glance. Common color-coding strategies include using specific colors for client meetings, internal meetings, personal tasks, and deadlines.

Users should note that the drag-and-drop feature only changes an event's date, not its time. If you need to change both the date and time of an event, drag it to the new date first, then double-click the day to open the event details and delete/recreate it with the correct time. Similarly, when repositioning popup windows that block your view of the calendar, click and drag the header bar to move them to a convenient location on screen while keeping the calendar grid visible.

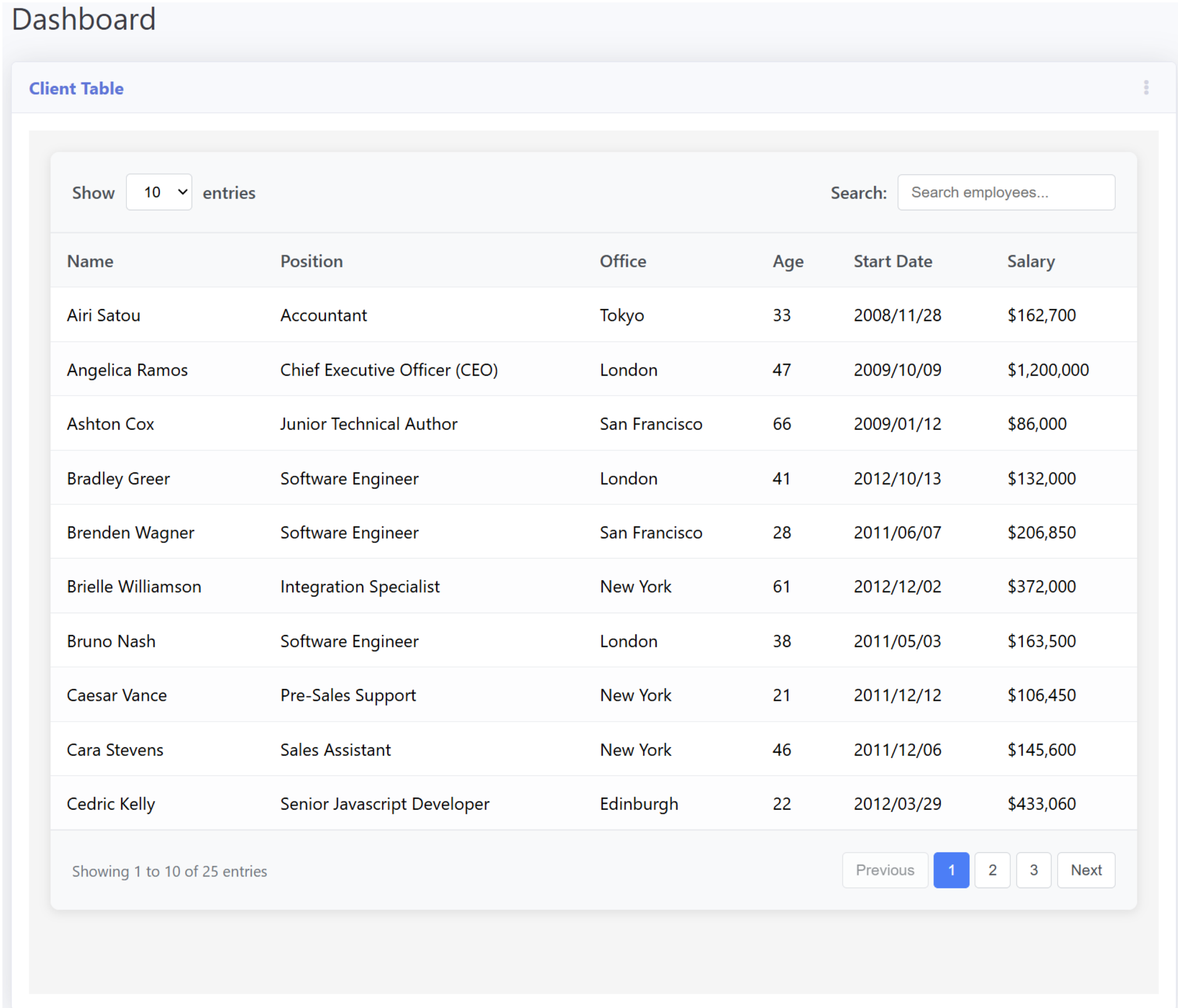
Client Data Table (Data Management)

URL: https://crmsystemaistmarytx.onrender.com/table/

Purpose Statement

The Employee Data Table page serves as a searchable and sortable interface for viewing employee records in a structured tabular format. Specifically, this page enables users to browse employee information, filter results using search criteria, and navigate through large datasets using pagination controls. In particular, HR personnel, managers, and administrators access this page to review employee details, locate specific records, and analyze workforce data.

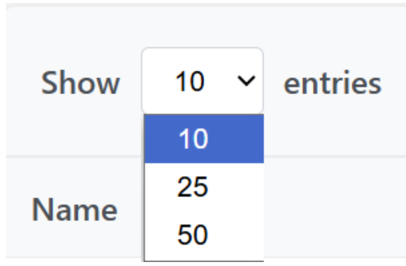
Page Layout & Navigation



Name	Position	Office	Age	Start Date	Salary
Airi Satou	Accountant	Tokyo	33	2008/11/28	$162,700
Angelica Ramos	Chief Executive Officer (CEO)	London	47	2009/10/09	$1,200,000
Ashton Cox	Junior Technical Author	San Francisco	66	2009/01/12	$86,000
Bradley Greer	Software Engineer	London	41	2012/10/13	$132,000
Brenden Wagner	Software Engineer	San Francisco	28	2011/06/07	$206,850
Brielle Williamson	Integration Specialist	New York	61	2012/12/02	$372,000
Bruno Nash	Software Engineer	London	38	2011/05/03	$163,500
Caesar Vance	Pre-Sales Support	New York	21	2011/12/12	$106,450
Cara Stevens	Sales Assistant	New York	46	2011/12/06	$145,600
Cedric Kelly	Senior Javascript Developer	Edinburgh	22	2012/03/29	$433,060

The page displays a centered container with a clean, card-based design against a light gray background. At the top of the container, a header section contains data display and filtering controls arranged horizontally. Below the header, the main data table occupies the central area, displaying employee records in rows and columns with alternating row shading for improved readability. At the bottom of the container, a footer section provides pagination controls and information about the currently displayed records. The entire interface uses a responsive design that adjusts layout on smaller screens.

Header Controls Section



The header section spans the full width of the table container and is divided into two main control groups positioned on opposite sides. On the left side, the **entries control** allows users to adjust how many records display per page. On the right side, the **search control** provides text-based filtering functionality.

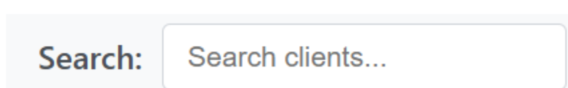
Entries Per Page Control

- **Show Dropdown** (Dropdown selector, Optional): Controls the number of employee records displayed on each page. The dropdown appears with a label "Show" before it and the word "entries" after it.
    - **Field Type:** Dropdown select menu
    - **Validation Rules:** Accepts preset values only (10, 25, or 50 entries)
    - **Dependencies:** Changing this value resets pagination to page 1 and updates the table display and footer information accordingly

Available options typically include:

- 10 entries per page (default)
- 25 entries per page
- 50 entries per page

Search Control



- **Search Input** (Text input, Optional): Filters the employee table based on entered text. The field displays with a "Search:" label and placeholder text "Search clients..."
    - **Field Type:** Text input
    - **Validation Rules:** Accepts any alphanumeric text; performs case-insensitive search across all employee data fields

- **Dependencies:** Searches all visible columns simultaneously; updates table display in real-time as users type; resets pagination to page 1 when search terms are entered or modified

Data Table Section

The main table displays employee records with six columns arranged from left to right. Each column has a header row with labels, and data rows follow below. The table uses zebra striping (alternating row colors) to improve readability, and rows highlight with a light gray background when users hover over them.

Table Columns

Name	Position	Office	Age	Start Date	Sales

The table contains the following columns in order from left to right:

1. **Name** (Text column): Displays the client's full name
2. **Position** (Text column): Shows the client's job title or role
3. **Office** (Text column): Indicates the office location or city where the client works
4. **Age** (Numeric column): Shows the client's age in years
5. **Start Date** (Date column): Displays the client's hire date in YYYY/MM/DD format
6. **Sales** (Currency column): Shows the client's salary with currency symbol and formatted numbers

All columns are read-only and display information only. The specific employee records shown vary based on the dataset, search filters, and pagination settings.

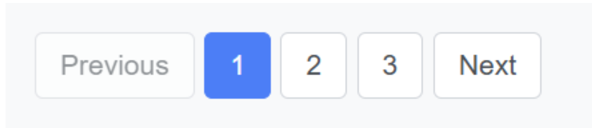
Information Display

- **Info Text** (Read-only text display): Shows the range of currently displayed records and total record count. The text follows the format "Showing [start] to [end] of [total] entries" where values update dynamically based on current page and filters.

When search filters are active, the information display includes additional text indicating the filtered state, typically appending "(filtered from [original total] total entries)" to show how many records exist before filtering.

Pagination Controls

The pagination section displays when the total number of records exceeds the selected entries-per-page value. Pagination controls appear as a horizontal row of buttons with the following components:



- **Previous Button** (Navigation button): Moves to the previous page of results. The button displays as "Previous" and becomes disabled (grayed out and non-clickable) when users are on the first page.
- **Page Number Buttons** (Navigation buttons): Display numbered buttons representing available pages. The currently active page button appears highlighted with blue background and white text. Users can click any page number to jump directly to that page. When many pages exist, the pagination shows a subset of page numbers with ellipsis (...) indicating skipped page ranges.
- **Next Button** (Navigation button): Advances to the next page of results. The button displays as "Next" and becomes disabled when users are on the last page.

Functional Actions

Data Display Actions

- **Entries Per Page Dropdown** (Header section, left side): Changes the number of records displayed per page. When users select a different value, the system immediately updates the table to show the specified number of records, resets to page 1, and updates the footer information to reflect the new display settings.

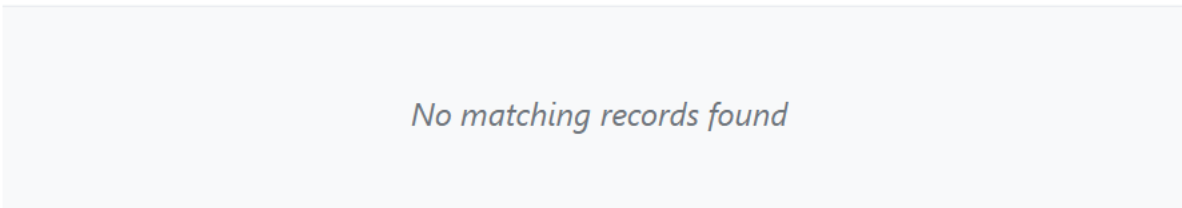
Workflow & Process Integration

The Employee Data Table functions as a reference and lookup tool within the broader CRM workflow. Users typically access this page when they need to verify employee information, locate specific team members for assignment to tasks or projects, or review workforce composition by office location or role. Subsequently, after identifying relevant employees through search or browsing, users may navigate to other CRM modules to assign tasks, schedule meetings, or update employee records in dedicated management interfaces. As a result, this page serves as a central directory that supports various HR and operational processes by providing quick access to essential employee data.

The search functionality enables efficient record location without requiring users to manually scan through multiple pages, particularly useful when working with large employee datasets. This then enables rapid identification of employees with specific skills, locations, or roles when coordinating projects or responding to organizational inquiries.

Error Handling & Validation

Search Errors



Error Message: "No matching records found" (Displayed within the table body area)

Trigger Condition: When the search input contains text that does not match any records in any column of the employee data table, the system displays this message in place of data rows.

Resolution Steps: Clear the search field or modify the search terms to use different keywords. Try searching for partial matches or single words rather than complete phrases. If you know specific details about the employee you're seeking, search for unique identifiers like office location or position title. Clearing the search field entirely restores the full unfiltered dataset.

Pagination Errors

The pagination system automatically adjusts when dataset size changes due to filtering. If users are viewing a higher page number when applying a search filter that reduces the total number of results, the system automatically resets to page 1 to ensure valid data display. No error messages appear for this automatic adjustment.

Tips & Best Practices

To maximize efficiency, use the search field to quickly locate specific employees rather than manually browsing through multiple pages. The search function operates across all columns simultaneously, so you can search for any visible information including names, positions, office locations, or even salary ranges. Users should note that the search is case-insensitive, meaning "london" and "London" produce identical results.

For best results when working with large datasets, adjust the entries-per-page dropdown to show 25 or 50 records at a time, which reduces the number of page clicks needed to browse through data. Furthermore, the search field updates results in real-time as you type, allowing you to see matching records appear immediately without pressing Enter or clicking a search button.

When searching for employees, remember that the search function matches partial text, so entering "eng" will return results for "Engineer," "Engineering," and any other fields containing those letters. Additionally, you can search for numerical values like ages or portions of salary figures to find employees within specific ranges.

Users should note that the information display at the bottom left of the table always shows your current position in the dataset, indicating which records are visible on screen and how many total records exist. Similarly, when filters are active, this display includes additional information showing how many records were filtered from the original dataset, helping you understand the impact of your search criteria.

For optimal navigation through paginated results, use the numbered page buttons to jump directly to specific pages rather than repeatedly clicking Next, especially when you need to reach pages near the end of large datasets. Furthermore, the Previous and Next buttons provide convenient sequential navigation when reviewing records systematically page by page.

When the pagination controls show ellipsis (...) between page numbers, this indicates skipped page ranges. Click the visible page numbers on either side of the ellipsis to access those regions of the dataset, and the pagination will update to show additional page numbers in that range.

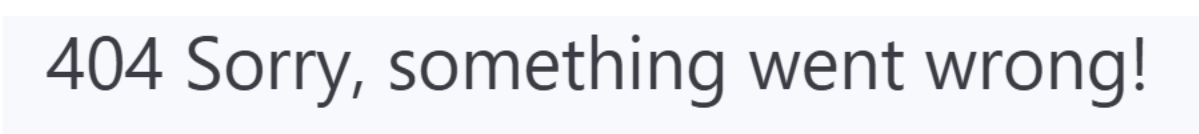
404 Error Page (System Messages)

URL: https://crmsystemaistmarytx.onrender.com/404/

Purpose Statement

The 404 Error Page appears when users attempt to access a page or resource that does not exist in the CRM system. Specifically, this page informs users that the requested content is unavailable while providing navigation options to return to functional areas of the application.

Page Layout & Navigation



The page maintains the standard CRM interface with the left sidebar navigation menu visible. In the main content area, an error message appears stating "404 Sorry, something went wrong!" The left sidebar displays links to major CRM modules including Dashboard, Team Manager, Client Table, Calendar, and Manual (for authorized users). Below the main content area, a footer displays copyright information.

Error Message Display

The primary content area contains a single heading: "404 Sorry, something went wrong!" This message appears in dark text and serves as the only content-specific element on the page. No additional explanatory text or instructions appear below this heading.

Functional Actions

Navigation Actions

- **Sidebar Navigation Links** (Left sidebar): Direct users to different CRM modules. When clicked, each link navigates to the corresponding page, allowing users to exit the error page and access functional areas.
- **Sidebar Toggle Button** (Bottom of left sidebar): Collapses or expands the navigation menu. Once clicked, the system adjusts the sidebar visibility.
- **AI Help Button** (Floating button in bottom-right corner, conditionally visible): Opens an AI assistance panel. Only available for authorized users.
- **Close Button** (X icon in AI Help panel header, when visible): Closes the AI help panel.
- **Escape Key**: Pressing Escape closes the AI help panel if currently open.

Workflow & Process Integration

The 404 Error Page interrupts normal CRM workflows when users follow broken links, mistype URLs, or attempt to access deleted content. Subsequently, users utilize the sidebar navigation to return to functional pages. The retention of standard navigation elements ensures users can recover from the error and continue their work without being stranded on the error page.

Error Handling & Validation

Page Not Found Error

Error Message: "404 Sorry, something went wrong!"

Trigger Condition: This page appears when users attempt to access a URL that does not correspond to any existing page or resource in the CRM system.

Resolution Steps: Use the sidebar navigation menu to navigate to a functional page such as Dashboard, Team Manager, Client Table, or Calendar. If you followed a link from another source, verify the URL for accuracy. If you were attempting to access a specific record, try locating it through the appropriate module's search functionality.

Tips & Best Practices

To maximize efficiency, use the sidebar navigation links to return to your intended workflow rather than using the browser's back button. Users should note that this error indicates the requested URL does not exist, not that there is an access permission issue.

For best results, if you frequently encounter this error on specific links, verify you are using current bookmarks or documentation. Furthermore, when navigating away from the error page, select the module most relevant to your current task to resume work quickly.

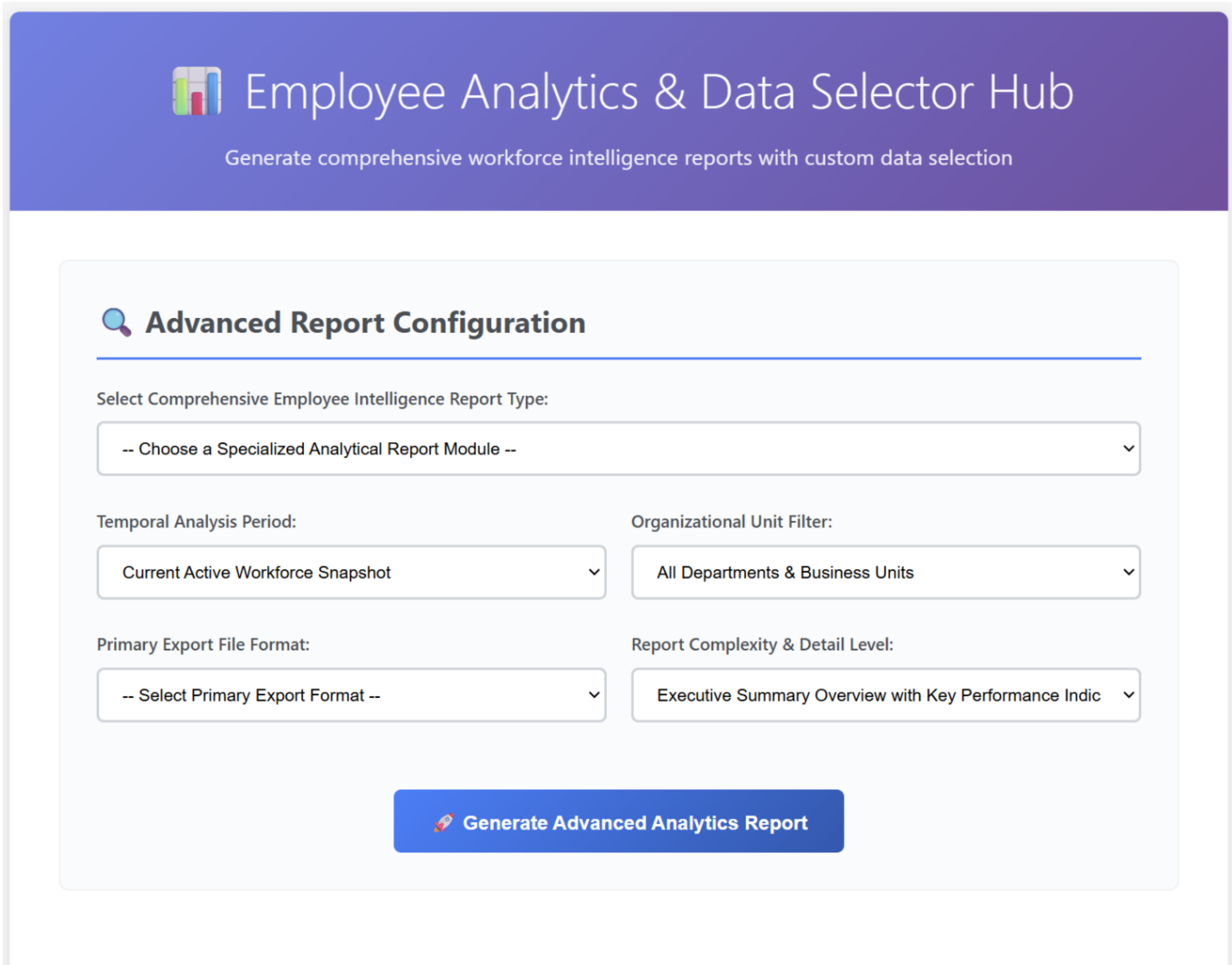
Employee Analytics & Data Selector Hub (Advanced Reporting)

URL: https://crmsystemaistmarytx.onrender.com/reporting-tool/

Purpose Statement

The Employee Analytics & Data Selector Hub serves as an advanced reporting interface where users configure comprehensive workforce reports, select specific data fields, and choose employee subsets for customized analytical output. Specifically, this page enables users to generate tailored employee reports by specifying report parameters, filtering data columns, and selecting individual employees for inclusion in exports. In particular, HR analysts, executives, and data administrators access this page to create custom workforce intelligence reports with granular control over included data.

Page Layout & Navigation



At the top of the page, a gradient purple header displays the page title "Employee Analytics & Data Selector Hub" with a subtitle explaining the page's purpose. Below the header, the main content area contains a primary report configuration section with multiple dropdown selectors and control fields. Further down the page, a data selector interface appears conditionally when certain report configurations are selected, providing tools for employee and field selection. The page uses a modern card-based design with rounded corners, shadows, and color-coded sections to distinguish different functional areas.

Report Configuration Section

The report configuration area occupies the upper portion of the content area and contains multiple form fields arranged in a structured layout. This section uses a light gray background with a blue bottom border on the heading "Advanced Report Configuration."

Report Configuration Fields

Fields are organized in two-column rows for efficient space usage, with some fields spanning the full width:

Select Report Type (Dropdown selector, Required):

- **Field Type:** Dropdown select menu
- **Field Name:** "Select Comprehensive Employee Intelligence Report Type"
- **Validation Rules:** Must select a value before generating report
- **Dependencies:** Certain report types trigger the data selector interface to appear

The dropdown contains multiple report options with verbose descriptive titles. Available report types vary and include options related to workforce demographics, compensation analysis, organizational structure, and other analytical categories.

Temporal Analysis Period (Dropdown selector, Optional):

- **Field Type:** Dropdown select menu
- **Field Name:** "Temporal Analysis Period"
- **Validation Rules:** Accepts preset time period values
- **Dependencies:** Certain time period selections may trigger additional configuration options

Options include current workforce snapshot, quarterly analysis, annual review, multi-year trends, and custom date range configuration.

Organizational Unit Filter (Dropdown selector, Optional):

- **Field Type:** Dropdown select menu
- **Field Name:** "Organizational Unit Filter"
- **Validation Rules:** Accepts department/unit filter values
- **Dependencies:** Selecting "Custom Employee Selection" triggers the data selector interface

Options include all departments, specific organizational tiers, and various business unit categories.

Export File Format (Dropdown selector, Required):

- **Field Type:** Dropdown select menu
- **Field Name:** "Primary Export File Format"
- **Validation Rules:** Must select a format before generating report

- **Dependencies:** Certain formats trigger the data selector interface

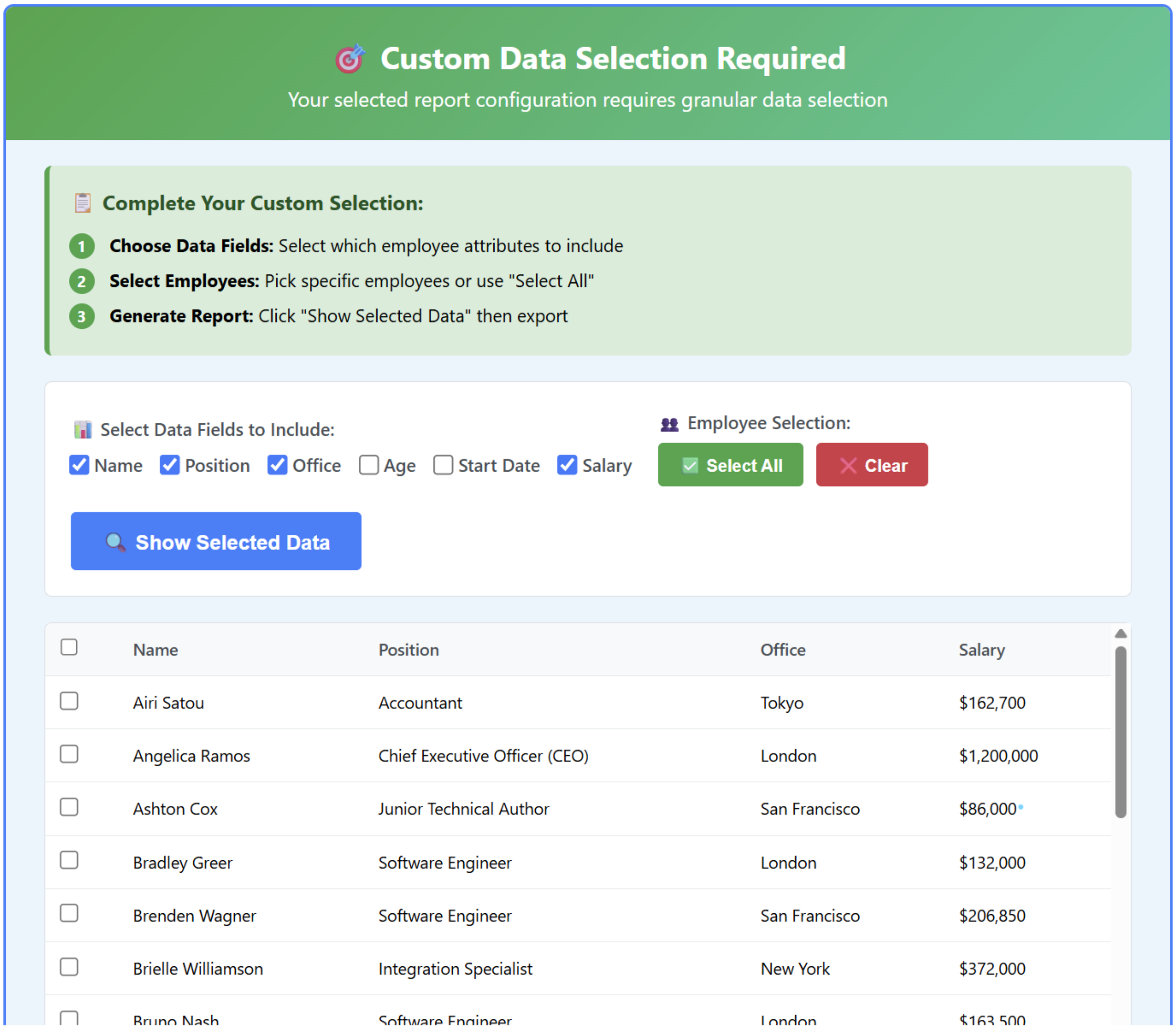
Available formats include Excel, CSV, PDF, JSON, XML, and specialized data formats. Some formats specifically support custom field selection.

Report Complexity Level (Dropdown selector, Optional):

- **Field Type:** Dropdown select menu
- **Field Name:** "Report Complexity & Detail Level"
- **Validation Rules:** Accepts complexity level values
- **Dependencies:** Higher complexity levels may trigger the data selector interface

Options range from executive summary to forensic-level analysis, with detailed and comprehensive options requiring custom data selection.

Data Selector Interface (Conditional)



The data selector interface appears below the report configuration section when users select specific report types, formats, or complexity levels that require granular data control. This section uses a blue background with a green header and contains multiple subsections for data selection.

Instructions Panel

At the top of the data selector, an instructional area with light green background provides numbered steps:

1. Choose which employee data fields to include
2. Select specific employees or use "Select All"
3. Generate the report by clicking "Show Selected Data" then export

Data Field Selection Controls

A checkbox group allows users to select which employee attributes to include in the report:

Available Data Field Checkboxes:

- **Name** (Checkbox, checked by default)
- **Position** (Checkbox, checked by default)
- **Office** (Checkbox, checked by default)
- **Age** (Checkbox, unchecked by default)
- **Start Date** (Checkbox, unchecked by default)
- **Salary** (Checkbox, checked by default)

Users can check or uncheck these boxes to control which columns appear in the employee selection table and final export. Changing field selections immediately updates the table column visibility.

Employee Selection Table

Below the field selection controls, a data table displays employee records with selectable rows:

Table Structure:

- **Selection Column:** Contains checkboxes for individual row selection
- **Data Columns:** Display employee information based on selected fields (Name, Position, Office, Age, Start Date, Salary)
- **Header Row:** Includes a "select all" checkbox and column labels; remains visible when scrolling through data

The table includes alternating row colors for readability and highlights selected rows with a blue background. The table area is scrollable when employee records exceed the visible height.

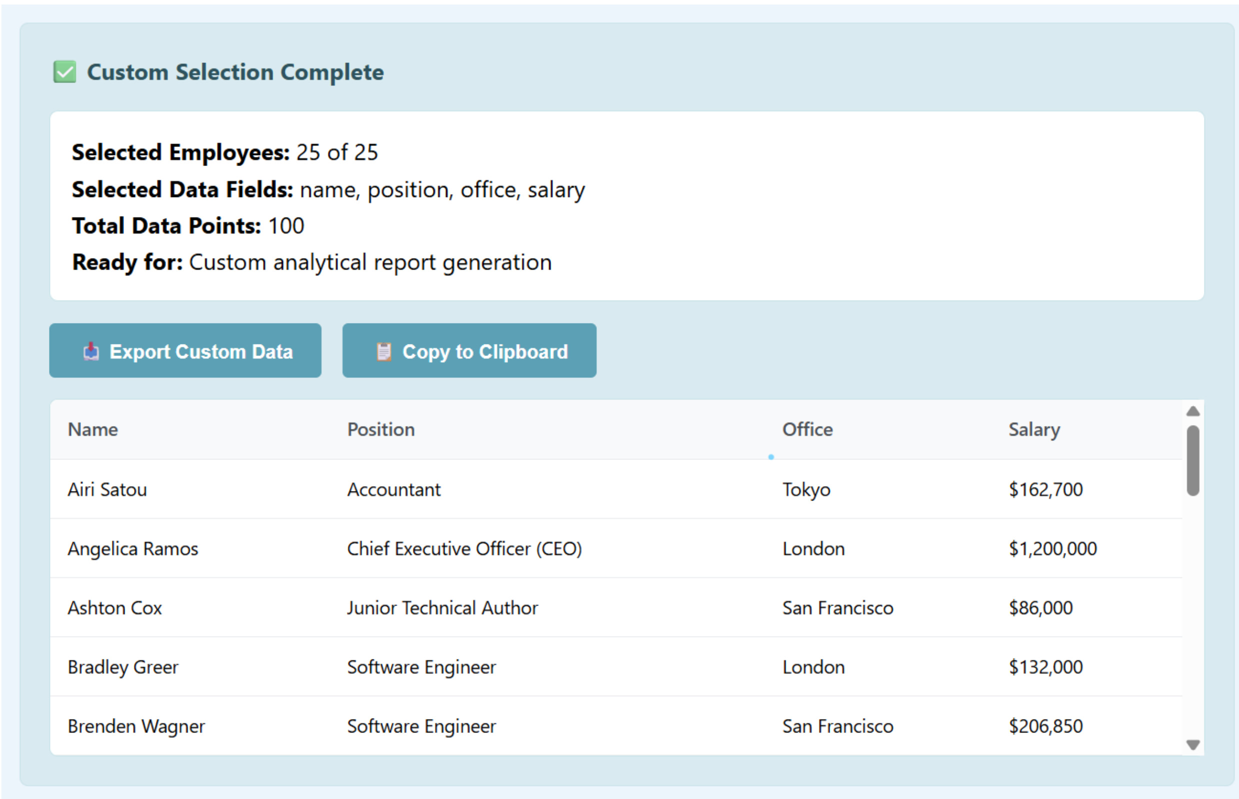
Selection Control Buttons

Between the field checkboxes and employee table, action buttons provide bulk selection controls:

- **Select All Button** (Green button): Selects all employees in the table and checks all row checkboxes

- **Clear Button** (Red button): Deselects all employees and unchecks all row checkboxes
- **Show Selected Data Button** (Blue button, prominent): Processes the current selection and displays results summary

Results Section (Conditional)



After clicking "Show Selected Data," a results section appears below the employee table with a light blue background:

Selection Summary: Displays statistics about the current selection including number of selected employees, selected data fields, total data points, and confirmation that data is ready for report generation.

Action Buttons:

- **Export Custom Data:** Downloads selected data as a CSV file

- **Copy to Clipboard:** Copies selected data in tab-delimited format for pasting into other applications

Data Preview: Shows a scrollable table preview of the selected data with only the chosen columns and employees visible.

Functional Actions

Report Configuration Actions

- **Report Type Dropdown** (Top of configuration section): Selects the analytical report category. When users choose certain report types, the system displays a notice and reveals the data selector interface after a brief loading animation.
- **Temporal Period Dropdown** (Configuration section): Sets the time range for analysis. Selecting certain options may trigger additional configuration requirements.
- **Organizational Unit Dropdown** (Configuration section): Filters employees by department or business unit. Selecting "Custom Employee Selection" triggers the data selector interface.
- **Export Format Dropdown** (Configuration section): Determines output file format. Selecting formats like CSV with custom field selection or JSON with custom schema triggers the data selector interface.
- **Complexity Dropdown** (Configuration section): Sets the level of detail in the report. Selecting detailed, comprehensive, or forensic levels triggers the data selector interface.
- **Generate Report Button** (Bottom of configuration section): Initiates report generation. When clicked, the system validates that required fields are completed. If the data selector is visible and no employees are selected, an error message appears requesting completion of the custom selection. Otherwise, the system displays a loading animation followed by a success message indicating report completion time and included data scope.

Data Selection Actions

- **Field Selection Checkboxes** (Data selector controls): Control which employee attributes appear in the table and export. When users check or uncheck boxes, the system immediately shows or hides corresponding table columns without requiring a refresh.

- **Select All Button** (Data selector controls): Selects every employee in the table. Once clicked, the system checks all row checkboxes, applies blue highlighting to all rows, checks the header select-all checkbox, and briefly highlights the "Show Selected Data" button to draw attention.
- **Clear Button** (Data selector controls): Deselects all employees. When clicked, the system unchecks all row checkboxes, removes blue highlighting from rows, unchecks the header checkbox, and hides the results section if visible.
- **Header Select All Checkbox** (Top-left of employee table): Toggles selection of all employees. When checked, the system selects all rows. When unchecked, the system deselects all rows. The checkbox displays an indeterminate state when some but not all rows are selected.
- **Row Checkboxes** (First column of employee table): Select individual employees. When users click a checkbox or anywhere on its row, the system toggles selection state, applies or removes blue highlighting, and updates the header checkbox state.
- **Show Selected Data Button** (Data selector controls): Processes the current selection and displays results. When clicked without any selected employees, an error alert appears. When clicked without selected fields, a different error alert appears. With valid selections, the system displays the results section with summary statistics and a preview table showing only selected employees and fields, then scrolls the results section into view.

Export Actions

- **Export Custom Data Button** (Results section): Downloads selected data as a CSV file. When clicked, the system generates a comma-separated values file containing only selected employees and fields, then initiates a browser download with a timestamped filename.
- **Copy to Clipboard Button** (Results section): Copies selected data to clipboard. When clicked, the system formats selected employees and fields as tab-delimited text suitable for pasting into spreadsheets, then displays a confirmation alert.

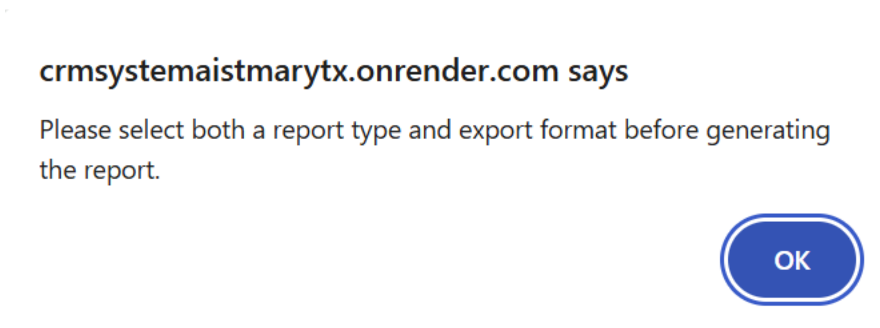
Workflow & Process Integration

The Employee Analytics & Data Selector Hub functions as a specialized reporting tool within the broader HR and analytics workflow. Users typically access this page when standard reports do not provide the specific data combination needed for analysis or when preparing custom datasets for external systems or stakeholders. Subsequently, users configure report parameters in the upper section, and if their selections trigger the data selector interface, they proceed to specify exactly which employees and data fields to include. The granular selection capability enables creation of targeted datasets that include only relevant information, supporting privacy considerations and focused analysis. As a result, this page bridges comprehensive workforce data and specific analytical needs, allowing users to extract precisely the information required without including unnecessary or sensitive data.

The multi-step workflow—configuration, selection, preview, and export—ensures users understand what data will be included before generating final output. This then enables verification and adjustment before committing to report generation or data export.

Error Handling & Validation

Missing Required Fields

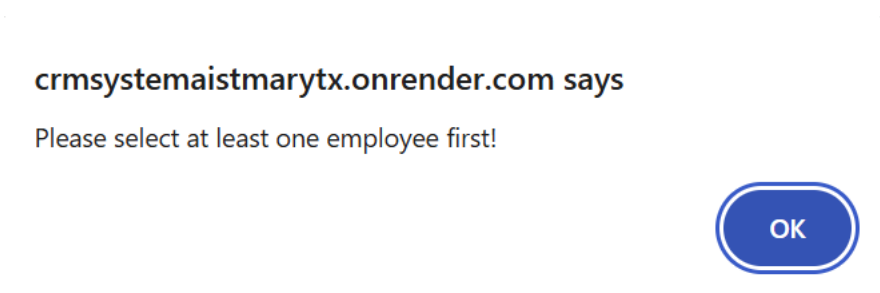


Error Message: "Please select both a report type and export format before generating the report."

Trigger Condition: When users click the Generate Report button without selecting values in both the Report Type and Export Format dropdown fields.

Resolution Steps: Select a report type from the first dropdown and an export format from the appropriate dropdown in the configuration section, then click Generate Report again.

No Employees Selected

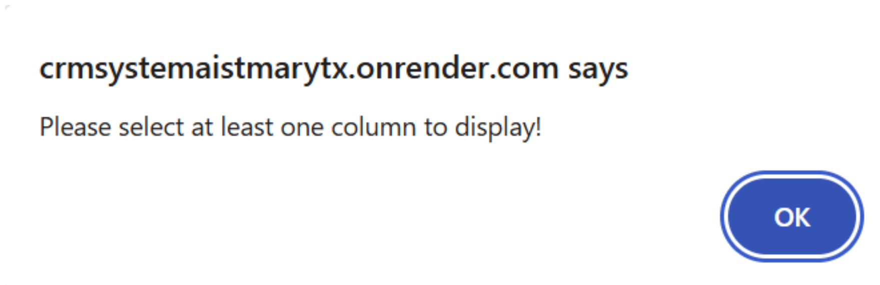


Error Message: "Please select at least one employee first!"

Trigger Condition: If users click "Show Selected Data" without selecting any employee rows in the table.

Resolution Steps: Click on employee rows or individual row checkboxes to select employees, or use the "Select All" button to select all employees, then click "Show Selected Data" again.

No Fields Selected



Error Message: "Please select at least one column to display!"

Trigger Condition: When users click "Show Selected Data" after unchecking all data field checkboxes.

Resolution Steps: Check at least one data field checkbox (Name, Position, Office, Age, Start Date, or Salary) to enable data display, then click "Show Selected Data" again.

Export Errors

Error Message: "Please make selections first!" (or "Please make both employee and column selections first!")

Trigger Condition: When users click Export Custom Data or Copy to Clipboard without having made valid employee and field selections.

Resolution Steps: Complete the selection process by choosing employees and data fields, clicking "Show Selected Data" to generate the preview, then attempt the export action again.

Tips & Best Practices

To maximize efficiency, begin by carefully selecting the report type and export format that match your analytical needs, as these selections determine whether the data selector interface appears and what customization options are available. Users should note that selecting certain report types, complexity levels, or export formats automatically triggers the custom data selection interface.

For best results when working with the data selector, first choose which data fields you need using the checkboxes, as this immediately updates the table to show only relevant columns and makes employee selection easier to review. Furthermore, the "Select All" button provides a quick way to include all employees, which you can then refine by unchecking specific individuals if needed.

When selecting employees, you can click either the checkbox or anywhere on the row to toggle selection—both methods work identically. Additionally, the header checkbox in the table's top-left corner provides a quick way to select or deselect all employees at once, and displays an indeterminate state when some but not all rows are selected.

Users should note that the "Show Selected Data" button must be clicked after making selections to generate the preview and enable export options. Similarly, reviewing the selection summary that appears helps verify you've included the correct number of employees and data fields before proceeding to export.

For optimal data export, use the CSV export option when you need to further analyze data in spreadsheet applications, and use the Copy to Clipboard option when you want to paste data directly into documents or presentations. Furthermore, the results preview section shows exactly what will be exported, allowing you to verify the data before committing to the final export.

When configuring complex reports, pay attention to notices that appear indicating custom data selection is required—these guide you through the multi-step process and explain why the data selector interface has appeared. Additionally, the loading animations and success messages provide feedback about report generation progress and completion.