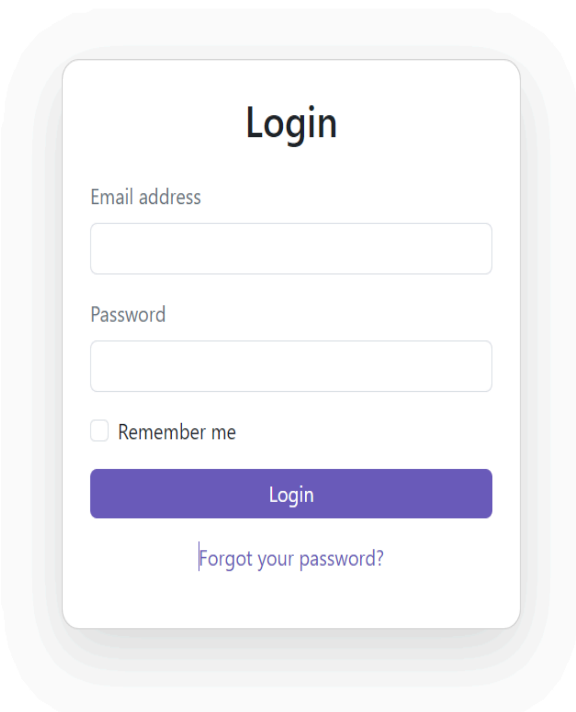
ERP Software Documentation

User Side:

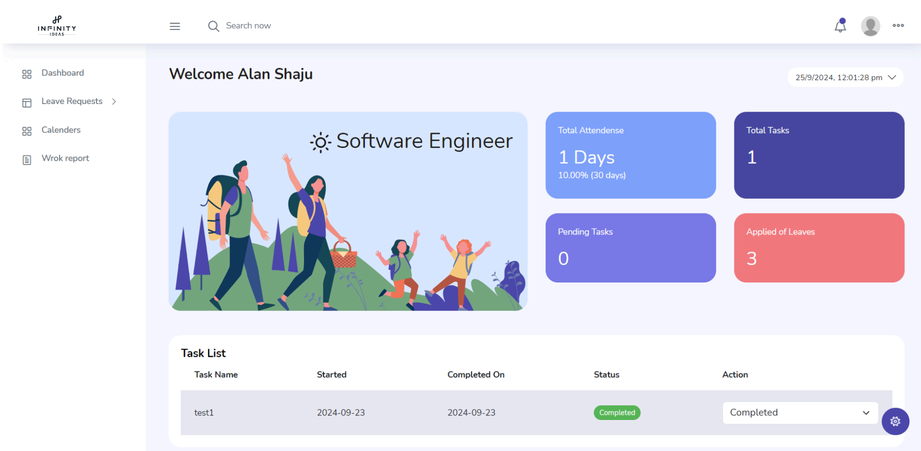
Login - Section:



User Can Login using Username and password.

Detail the comprehensive operations that users are permitted to perform within the application.

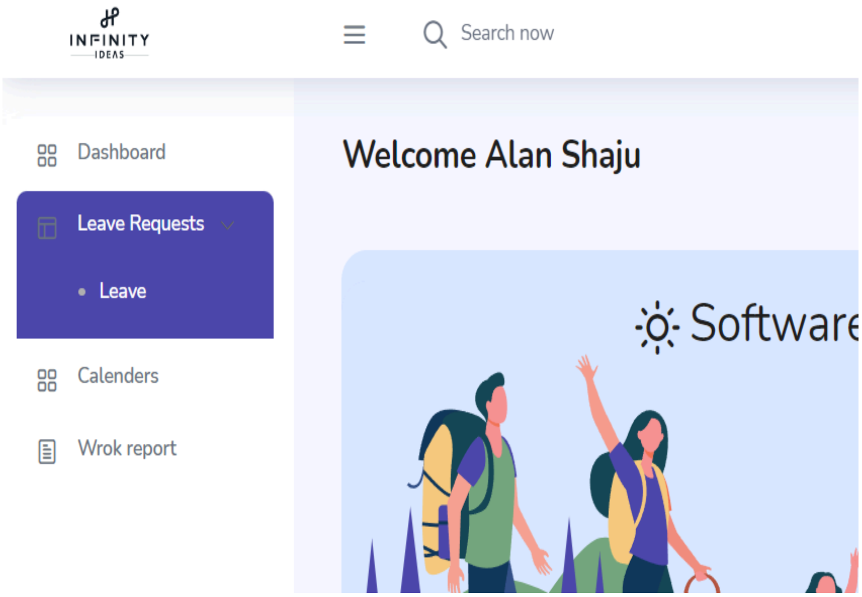
User Home Section or Control Panel:



User Control panel

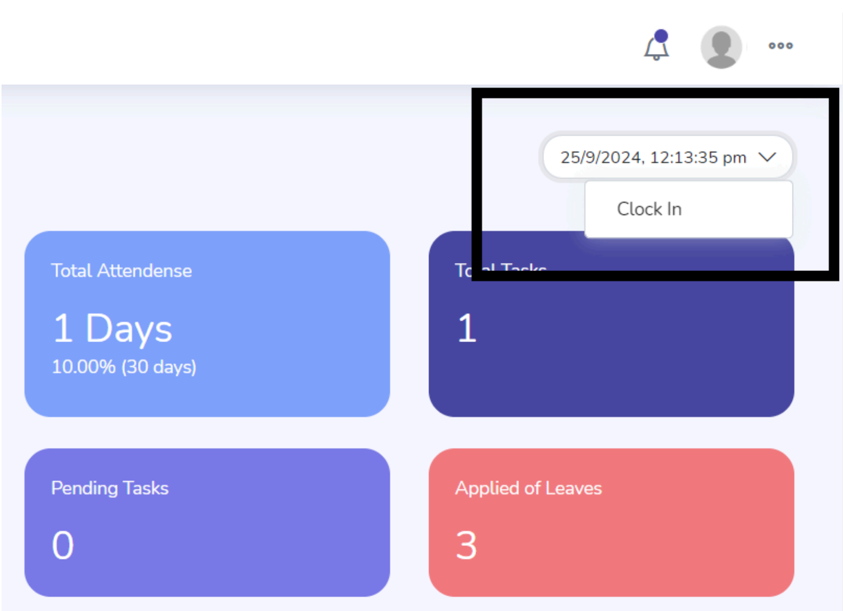
Users can engage in various activities, including clocking in and out, receiving notifications, managing a daily to-do list, organizing task lists, overseeing lead management, submitting leave applications, and managing client calendars. Additionally, users have access to metrics such as total working days, total task counts, pending tasks, and the number of leave applications submitted.

Navigation and properties:

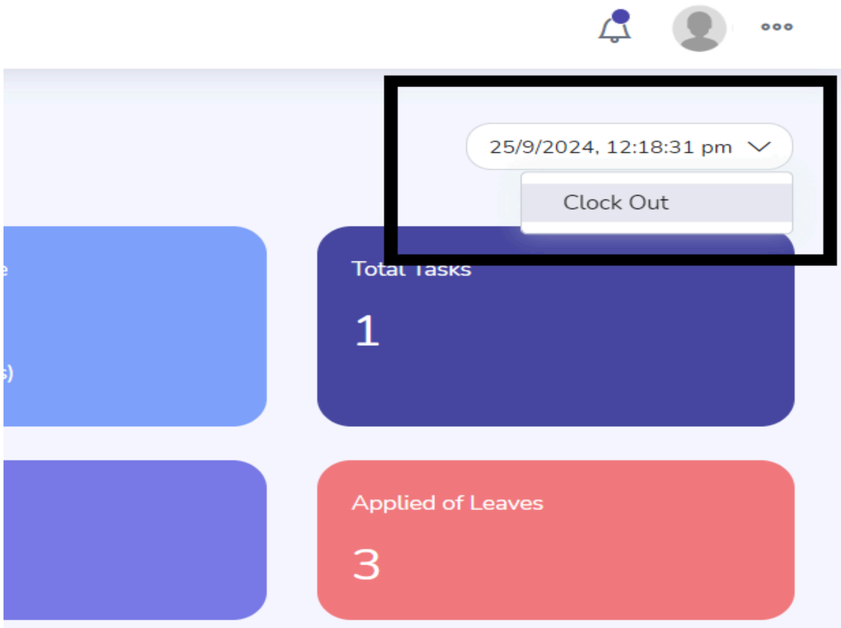


This is the user-side navigation tab, allowing access to operations such as Leave Management, Calendars, and Work Reports.

Clock in and Out Functionalities:

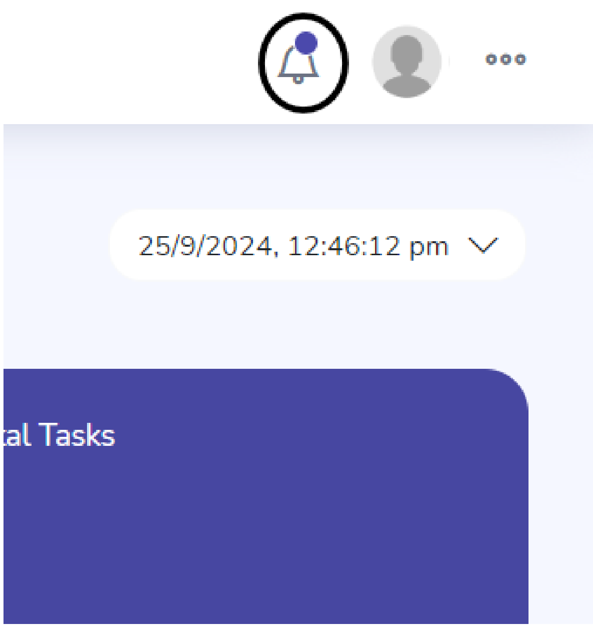


When the user clicks the **Clock In** button, the system records the user's attendance accordingly and starts monitoring the working hours.

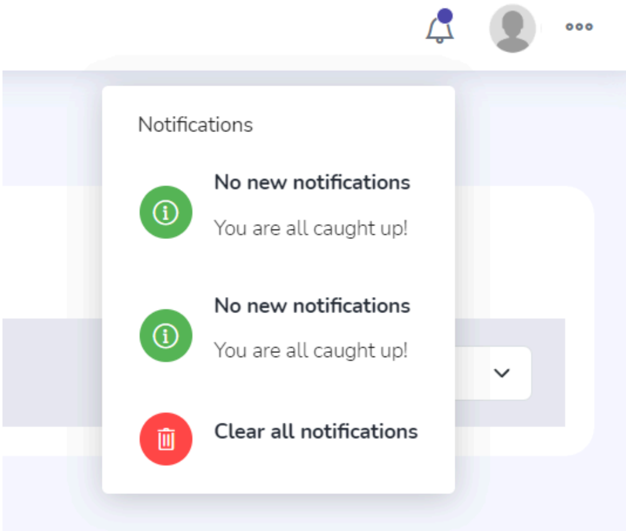


When the user clicks the **Clock Out** button, the system records and stores the total working hours for that day.

Notification Centre:

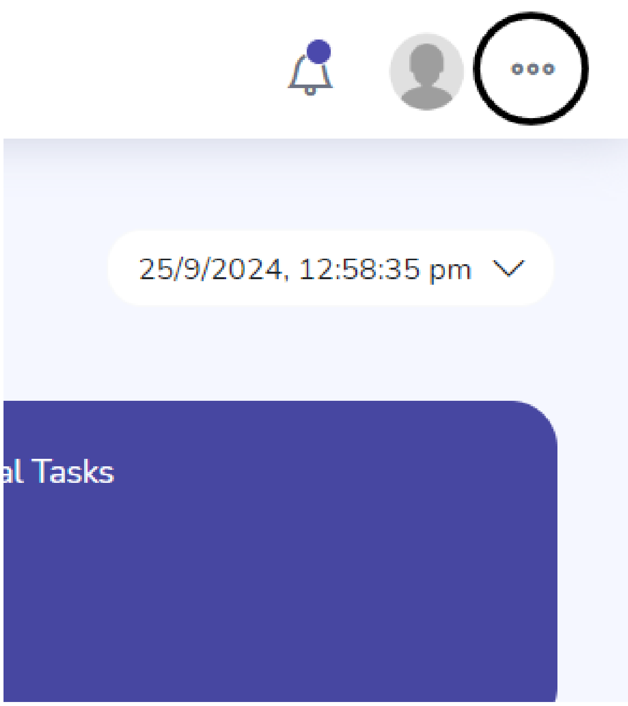


When the user clicks the **notification** icon, a popup displays the user's notifications.

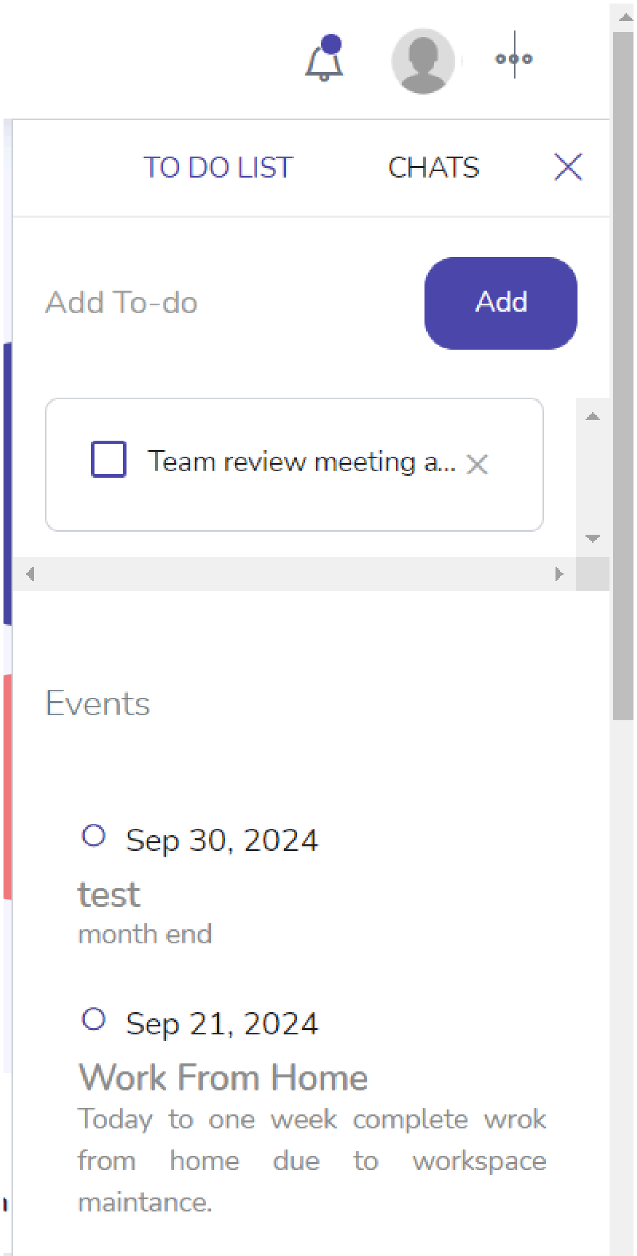


The notifications primarily display the current user's leave status updates.

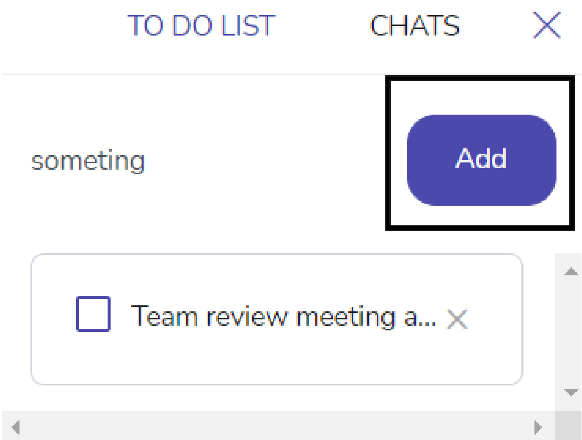
Daily To-Do List:



When the user clicks the **More** icon, a side tab opens, providing additional options for the user to perform various actions.

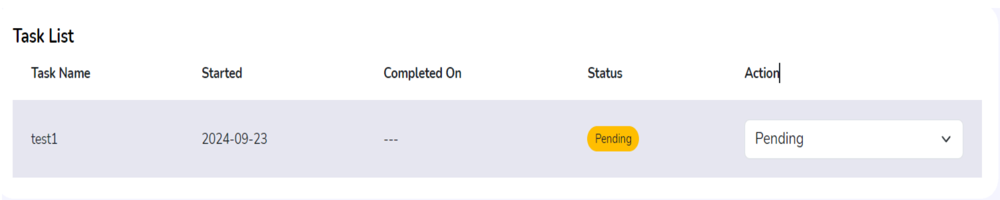


When the user clicks the **More** icon, a side window opens, displaying the to-do list and upcoming events, with the option to add daily tasks.

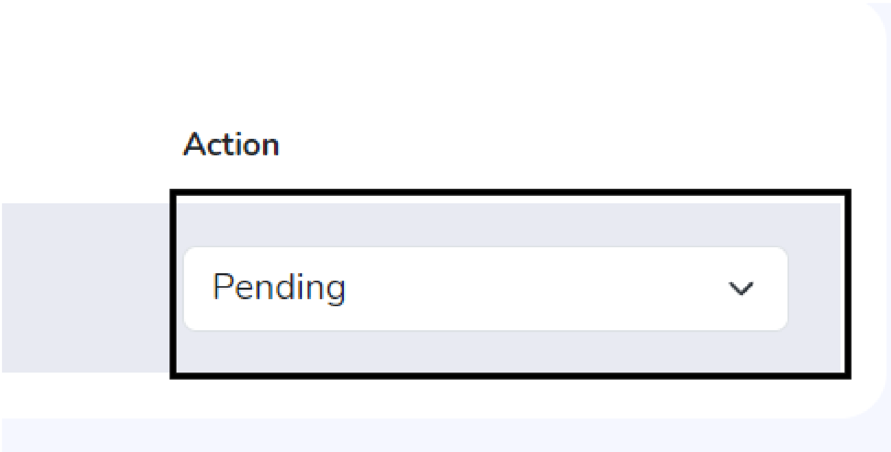


In the input field, the user can enter a task and click the **Add** button to store it. The task will then be displayed below the current task list.

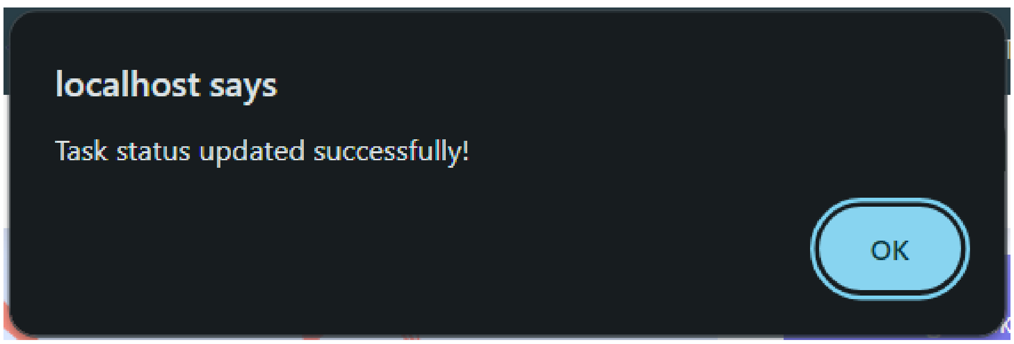
Task Management:



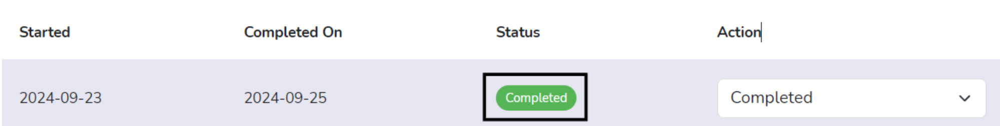
The task list panel displays the user's tasks along with a status menu for updates.



Once a task is completed, the user can update its status by selecting the appropriate option from the dropdown menu.

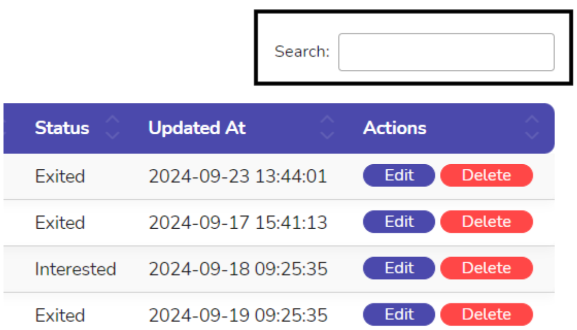


When the user selects the status, an alert message appears. The user must click the **OK** button to confirm and update the task status.

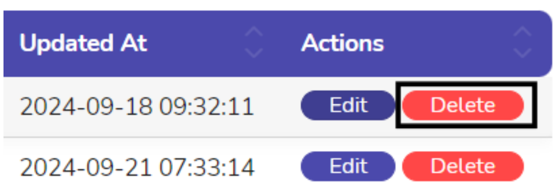


Finally, a confirmation message will indicate that the task has been successfully updated.

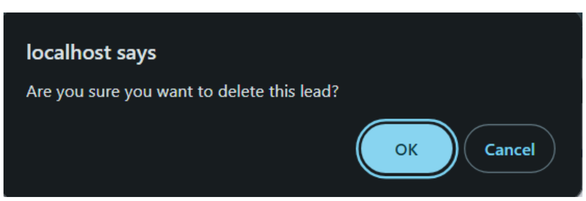
Leads Management:



In the leads table, users can search for specific lead elements efficiently.



Users can delete any inactive or exited leads as needed.

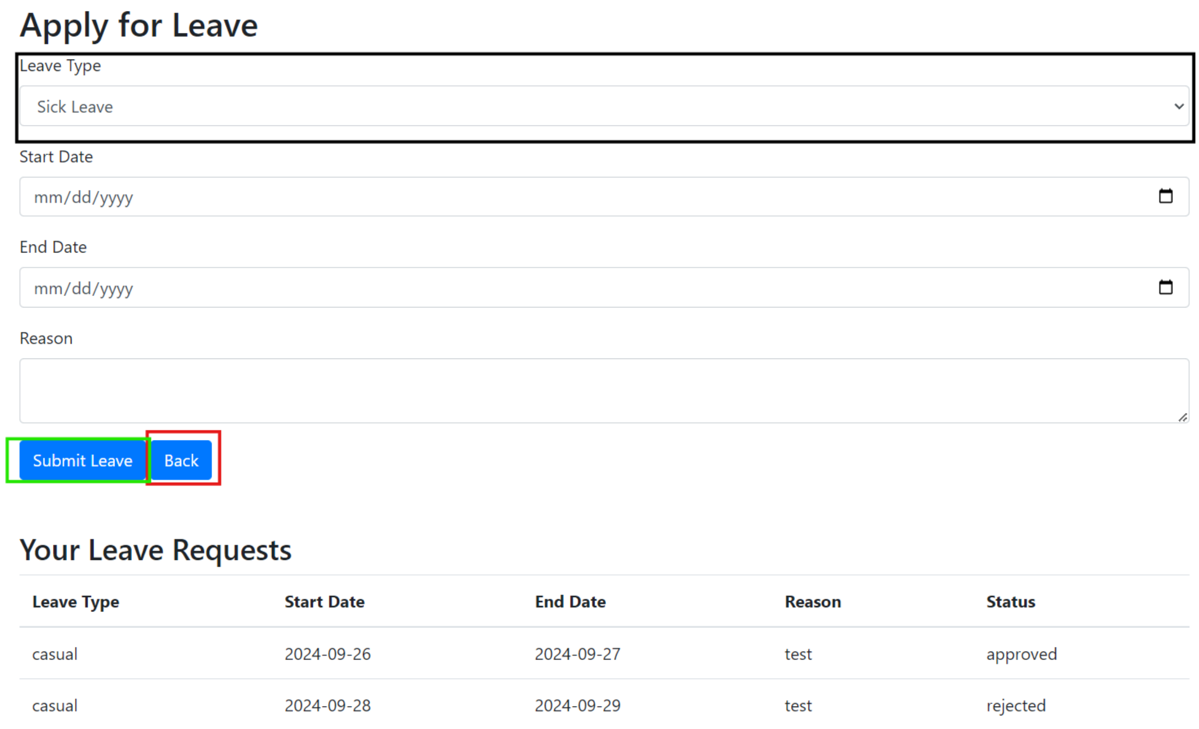


When the user clicks the **Delete** button, an alert prompts for confirmation of the deletion process. If the user clicks the **OK** button, the lead will be permanently deleted. Conversely, if the user clicks the **Cancel** button, the deletion operation will be terminated.

Next Follow-up	Status	Updated At	Actions
2024-09-28	Exited	2024-09-23 13:44:01	Edit Delete
2024-09-25	Exited	2024-09-17 15:41:13	Edit Delete
2024-09-21	Interested	2024-09-18 09:25:35	Edit Delete
2024-09-30	Exited	2024-09-19 09:25:35	Edit Delete
2024-09-21	Interested	2024-09-18 09:29:36	Edit Delete

When the user clicks the **Edit** button, a popup window appears, allowing them to make updates. After making the desired changes, the user can click the **Save** button, prompting an alert message to confirm the saving of the changes.

Leave Application:



Apply for Leave

Leave Type

Sick Leave

Start Date

mm/dd/yyyy

End Date

mm/dd/yyyy

Reason

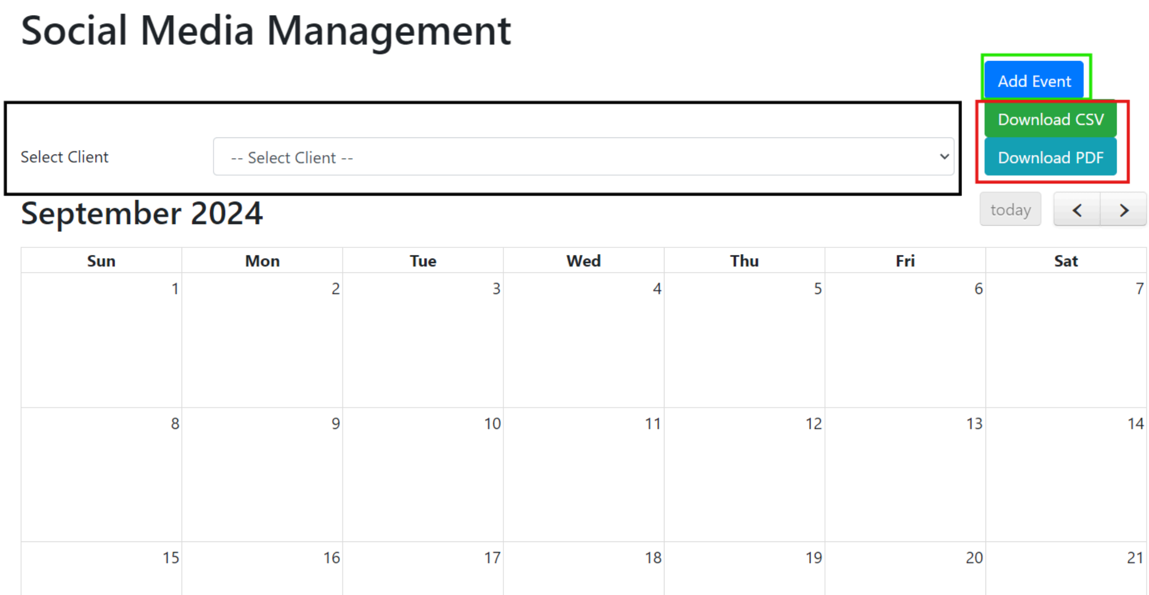
Submit Leave Back

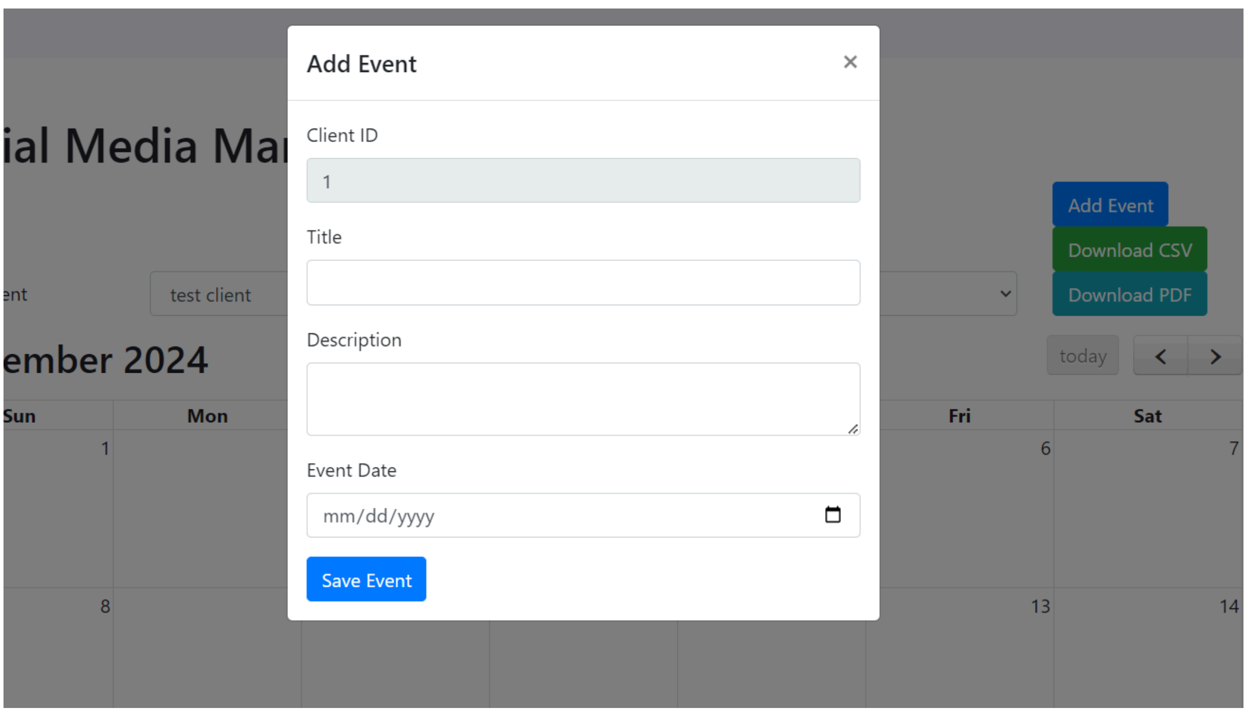
Your Leave Requests

Leave Type	Start Date	End Date	Reason	Status
casual	2024-09-26	2024-09-27	test	approved
casual	2024-09-28	2024-09-29	test	rejected

The user can select the leave type from the dropdown menu above, choose the desired date range, and click the **Submit** button to apply for leave. If the user clicks the **Back** button, the application will be terminated, and they will return to the control panel. Upon successful submission, the leave request will be displayed at the bottom of the leave application form.

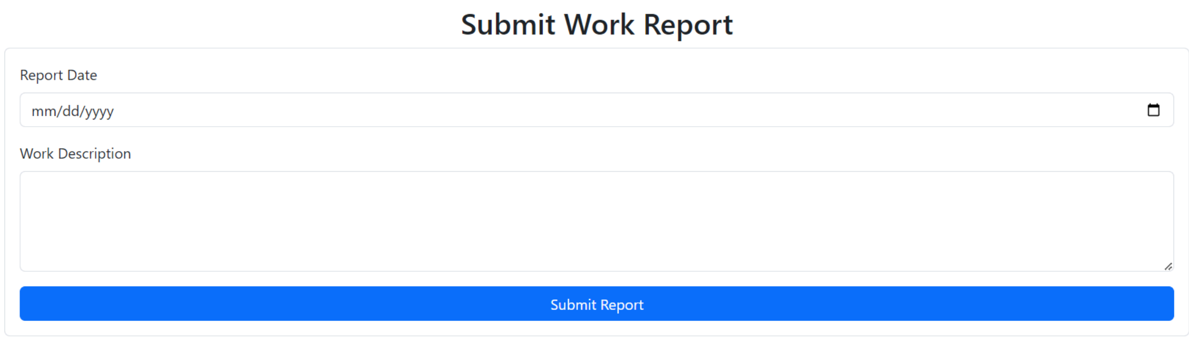
Social Media Management:





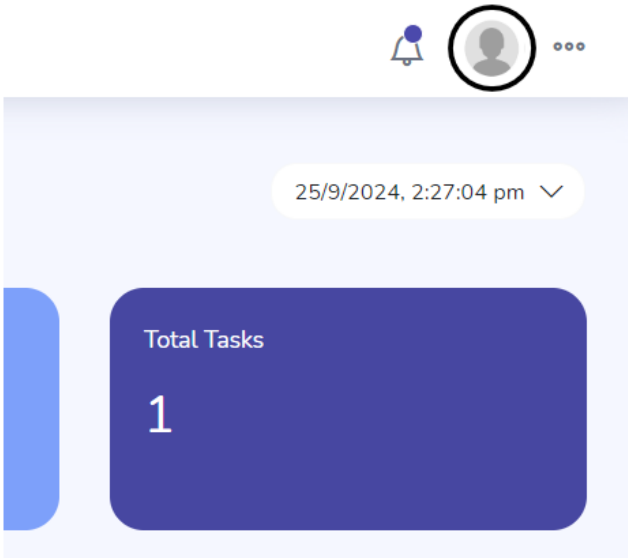
The user can access the social media management system. Upon selecting a client from the dropdown menu above, the calendar displays the social media engagements for that specific client. If the user selects a client and clicks the **Add Event** button, a popup window appears, allowing the user to set the event details, including the date, title, and description. Additionally, users have the option to download the calendar for the specified client in both PDF and Excel formats.

Work Report Section:

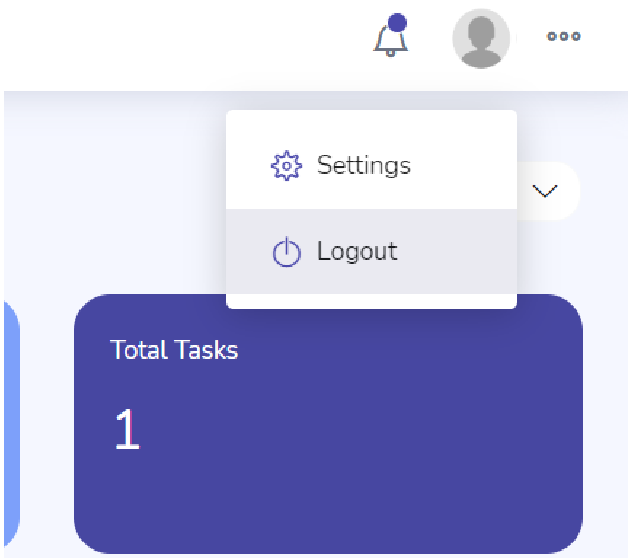


Users can submit their daily work reports through this portal.

Logout Section:



When the user clicks on the avatar image, a popup appears displaying the logout section.



When the user clicks the **Logout** button, all operations associated with the logged-in user are terminated, and the user is redirected to the login page.