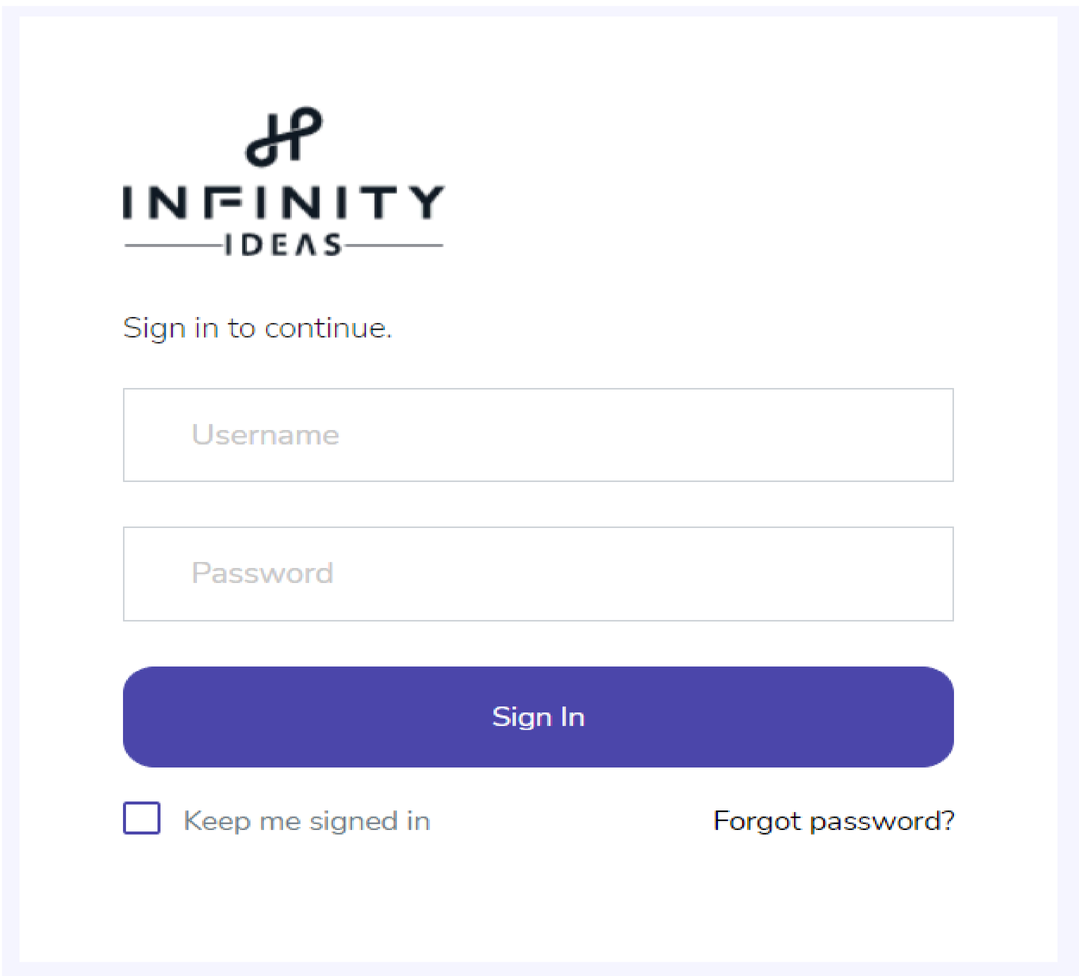
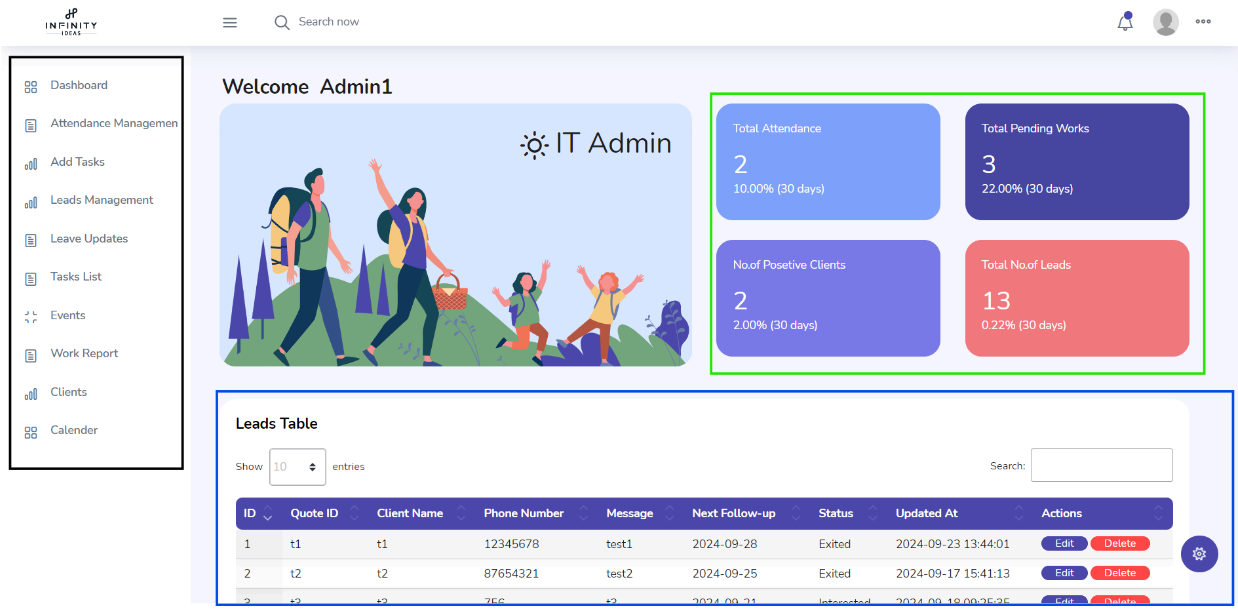
ERP Software Documentation

Admin Side:-

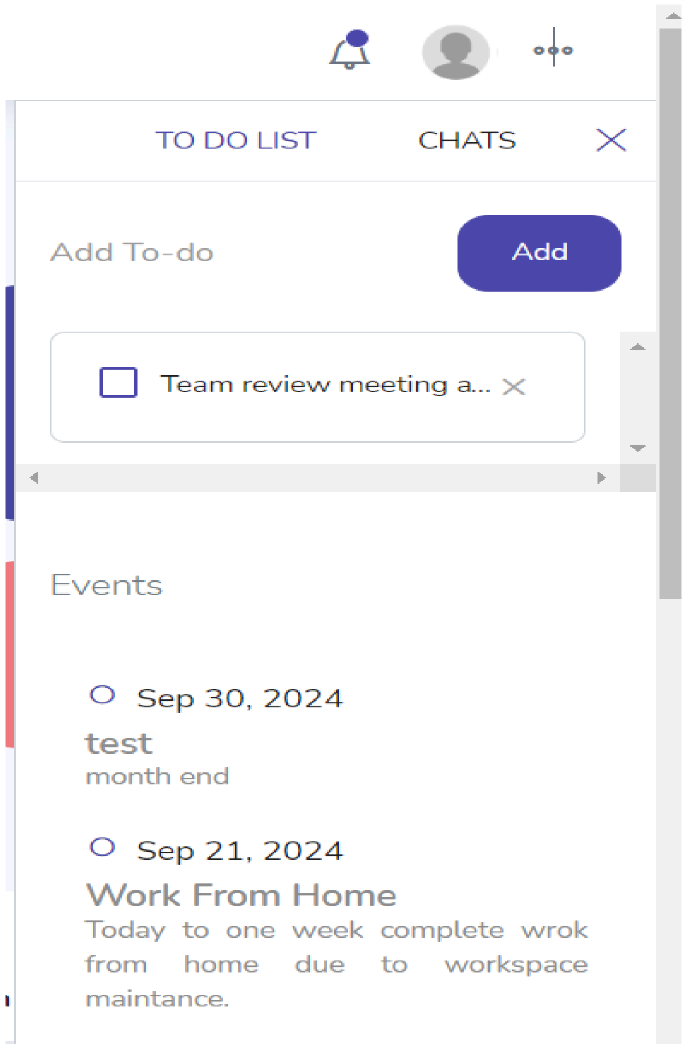


This is the login section for administrators to access and perform administrative controls and operations.



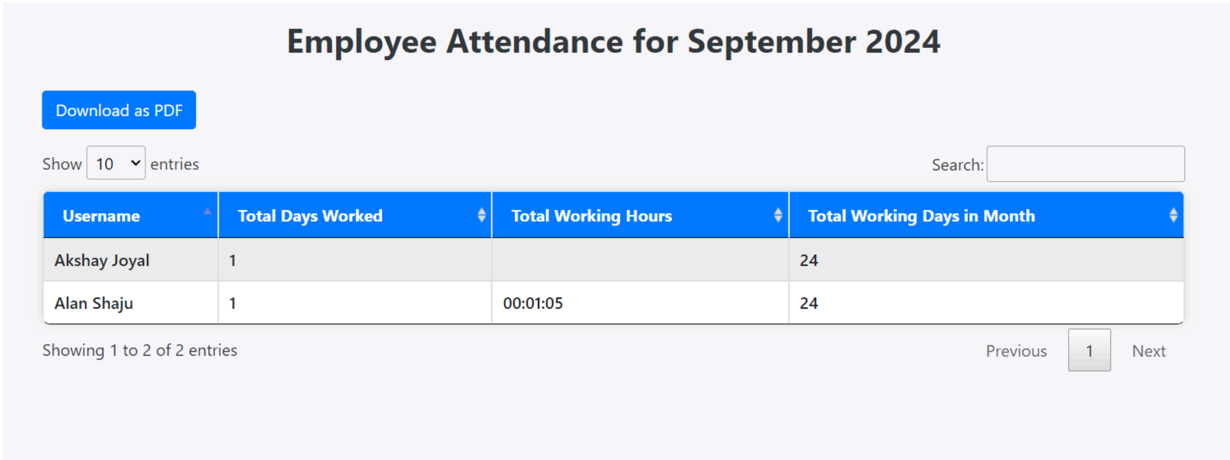
The image above utilizes three distinct colors to represent the basic operations clearly.

- It displays the navigation elements necessary for performing the specified tasks.
- This section presents today's total attendance, the number of pending tasks, the count of positive clients, and the total number of leads.
- This section displays the leads table along with its associated operations, including the ability to update lead elements such as next follow-ups and messages. Additionally, the admin has the option to delete a lead by clicking the **Delete** button.



When the admin clicks the **More** button in the upper right corner of the admin control panel, a tab opens that contains the to-do list. The admin can add daily tasks by clicking the **Add** button, and the events section is displayed at the bottom of the to-do list.

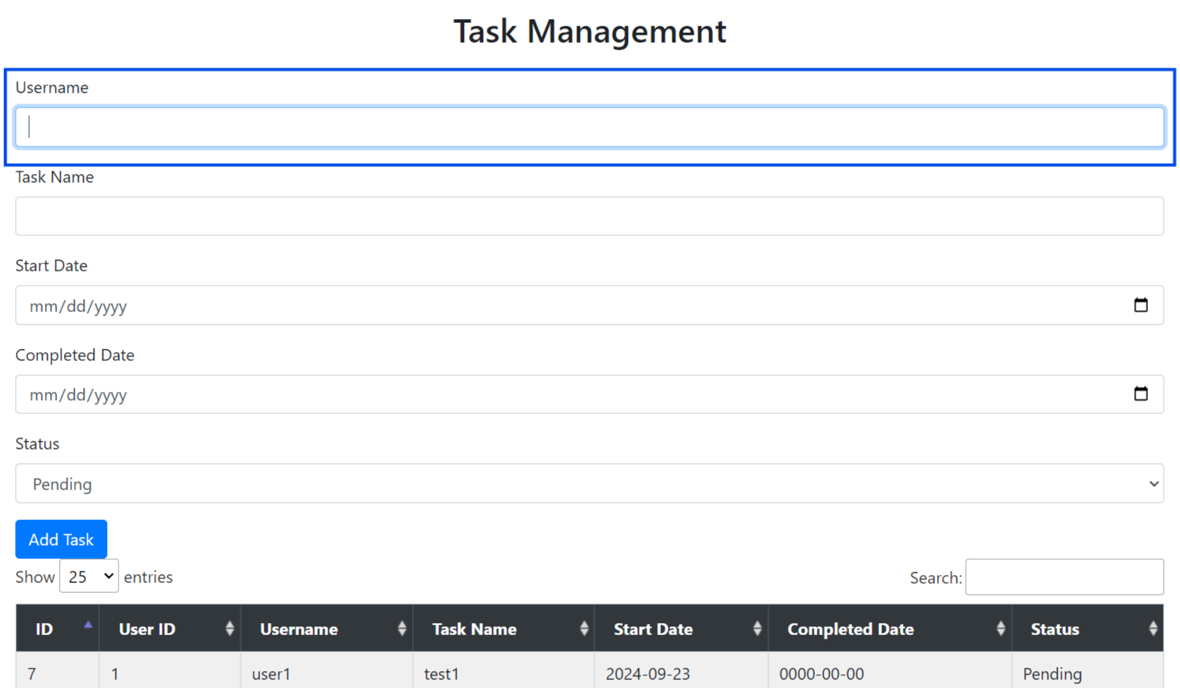
Employee Attendance Management:



Username	Total Days Worked	Total Working Hours	Total Working Days in Month
Akshay Joyal	1		24
Alan Shaju	1	00:01:05	24

The admin can view the total attendance of all employees for the month and has the option to download the attendance table as a PDF for verification purposes.

Task Management:

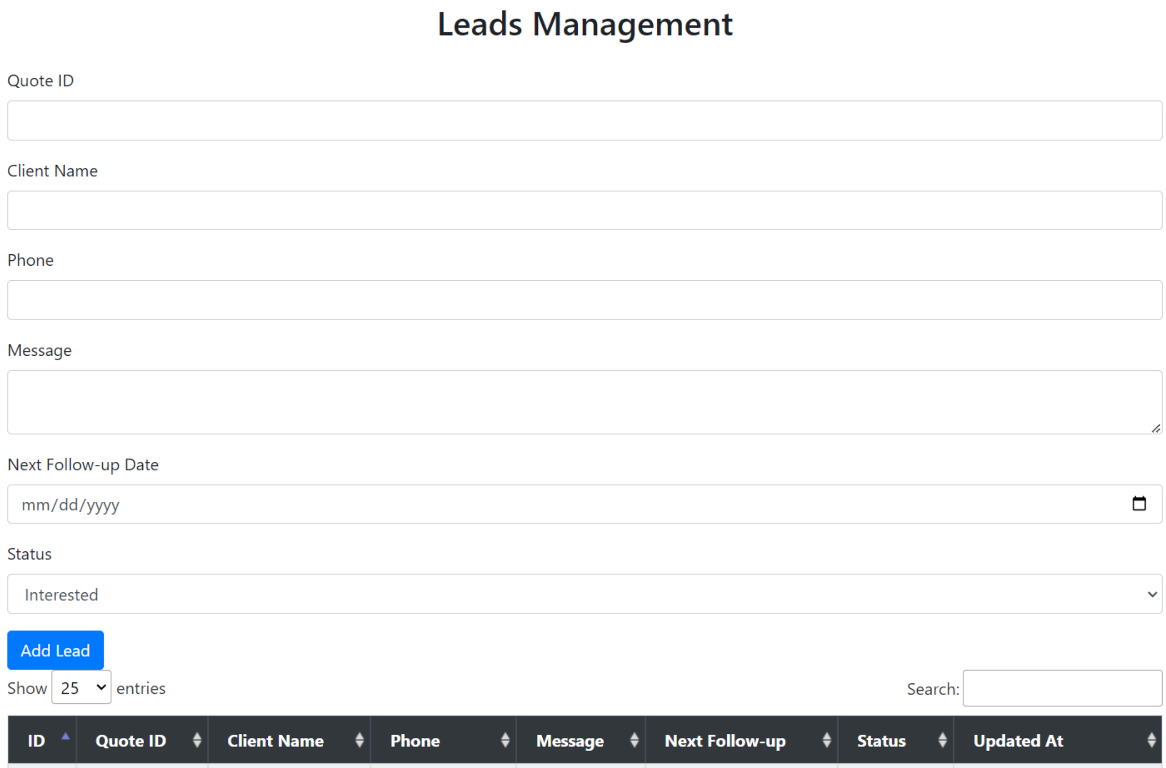


ID	User ID	Username	Task Name	Start Date	Completed Date	Status
7	1	user1	test1	2024-09-23	0000-00-00	Pending

The admin can assign tasks to specified employees by typing their usernames. As the admin types in the username input field, the system displays all usernames that match the entered letters.

Tasks can be assigned by clicking the **Add Task** button, and the assigned tasks will be displayed at the bottom of the form.

Leads Management:



The admin can add leads to the leads table by completing the provided form. Additionally, the admin can view the added leads displayed at the bottom of the form.

Leave Management:

Admin Panel: Manage Leave Requests

Show 25 entries Search:

ID	User ID	Leave Type	Start Date	End Date	Reason	Status	Actions
5	3	casual	09/26/2024	09/27/2024	test	Approve	Update
6	3	casual	09/28/2024	09/29/2024	test	Rejecte	Update
7	3	casual	09/27/2024	09/30/2024	Solo Trip	Approve	Update

Showing 1 to 3 of 3 entries Previous 1 Next

The admin can update employee leave requests; however, only the user ID is visible to prevent potential bias or personal conflicts regarding leave approvals. When the admin clicks the status dropdown menu, options for "Pending," "Approved," and "Rejected" are displayed. The admin can select the appropriate option and click the **Update** button to manage the leave request accordingly.

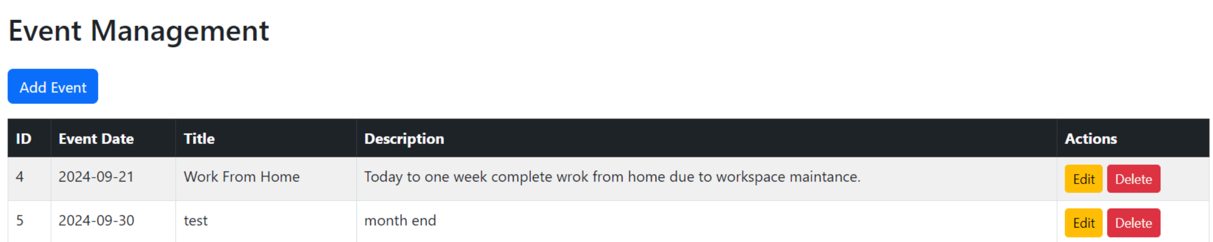
Employee Task Management:

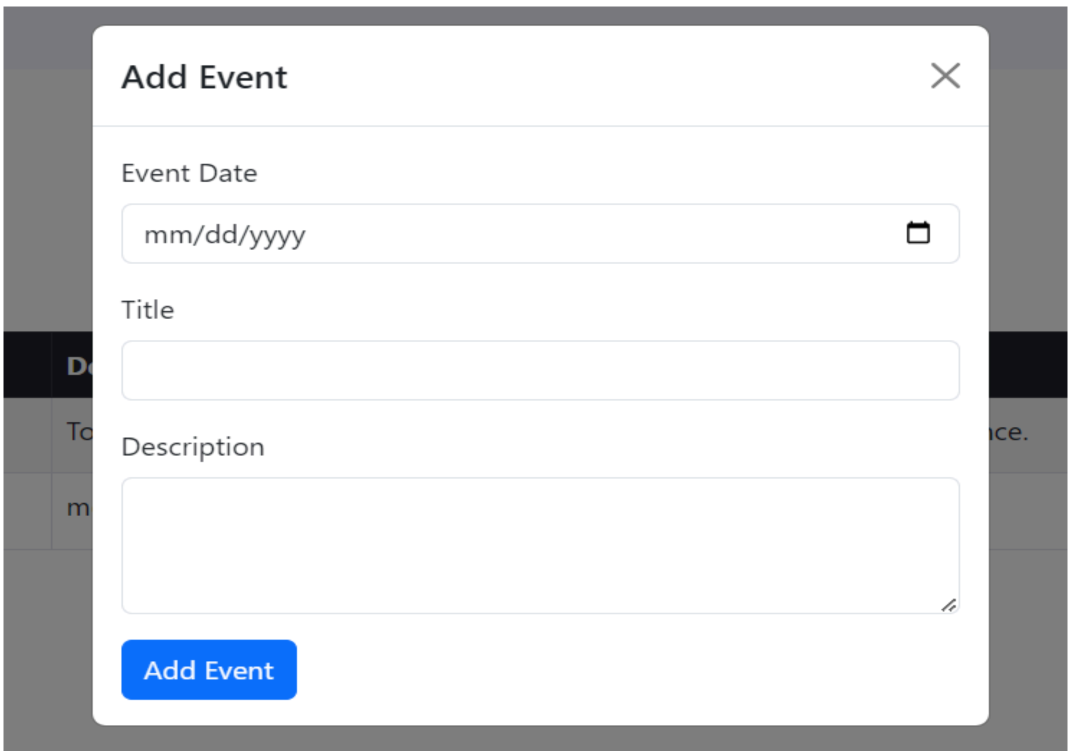
Employee Task Table

Employee Name	Phone Number	Assigned Task	Started At	Status	Action
user1		test1	2024-09-23	Pending	Send Enquiry
user2		test1	2024-09-23	Pending	Send Enquiry
Alan Shaju	7593968558	test1	2024-09-23	Completed	Send Appreciation
Akshay Joyal		test1	2024-09-23	Pending	Send Enquiry

The admin can send inquiries and express appreciation for employees' tasks. When the **Send Enquiry** button is clicked, it navigates to the WhatsApp application with the message: “Hi [User1], please provide an update on your pending task as soon as possible.” Similarly, clicking the **Send Appreciation** button directs the admin to WhatsApp with the message: “Hi [User1], congratulations on completing your task! Keep up the great work.”

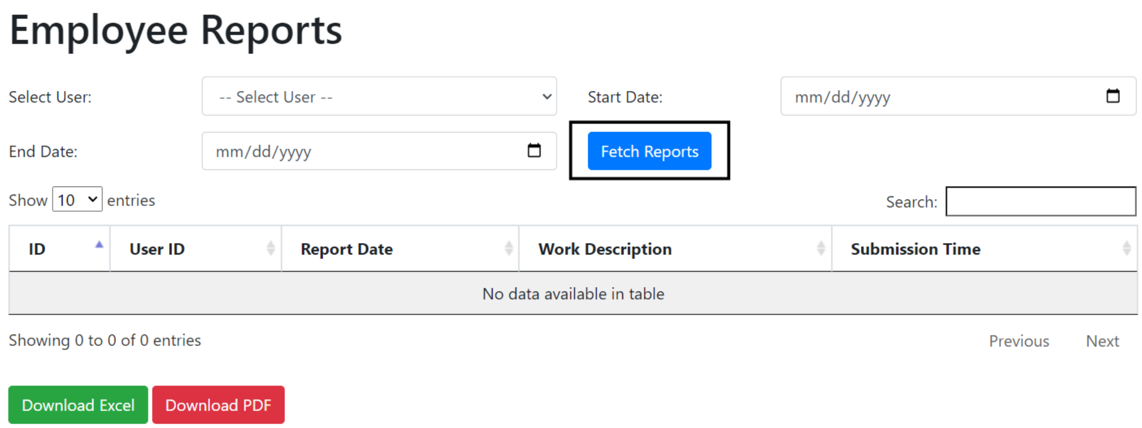
Event Management:





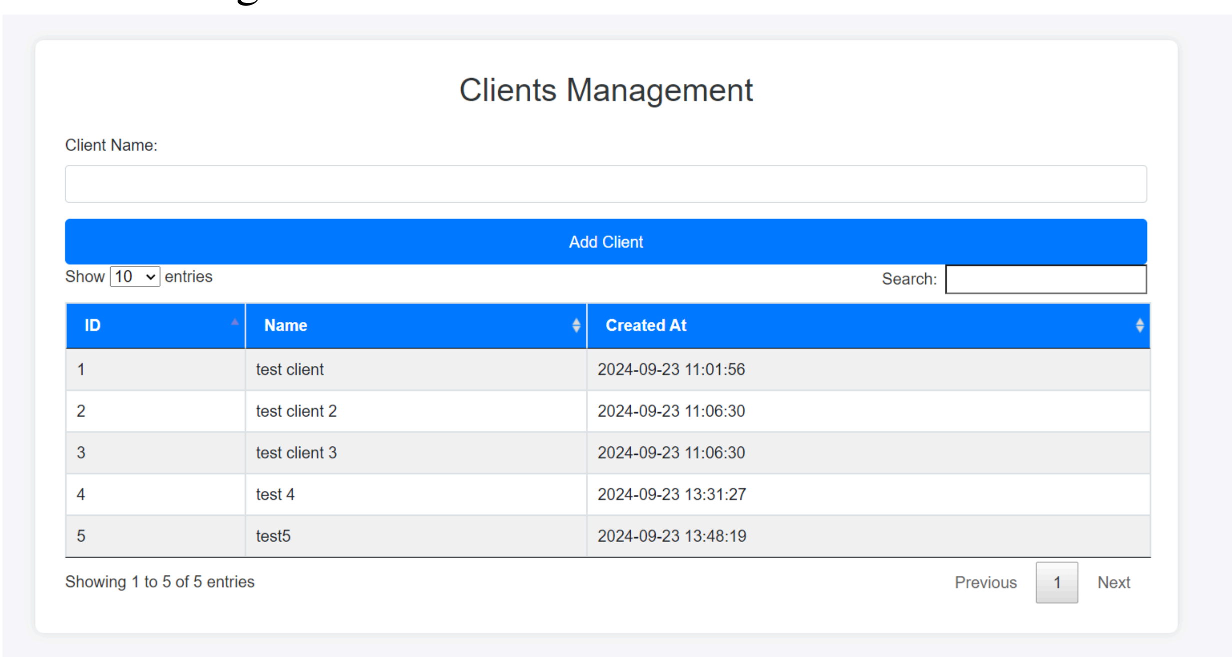
When the admin clicks the **Add Event** button, a popup window appears, allowing the admin to set the event date, title, and description. After entering the details, the admin can click the **Add Event** button to save the event. Additionally, the admin can view the list of events displayed below.

Employee Work Report Management:



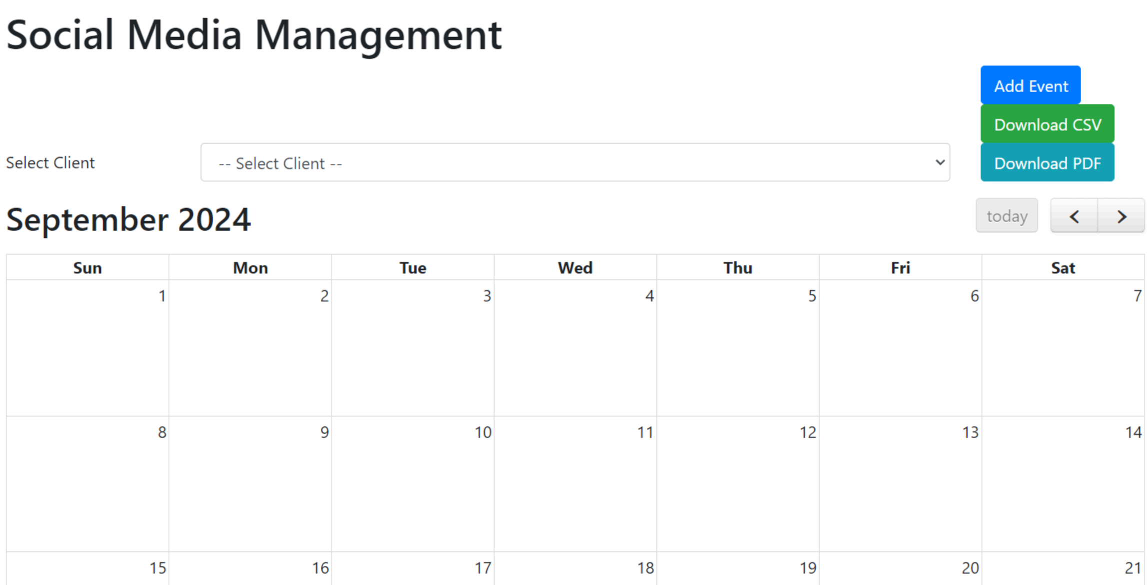
When the admin clicks the **Select User** dropdown menu to choose an employee and sets the date range, clicking the **Fetch Report** button generates the report for the specified employee within that date range. The admin also has the option to download the report in both PDF and Excel formats.

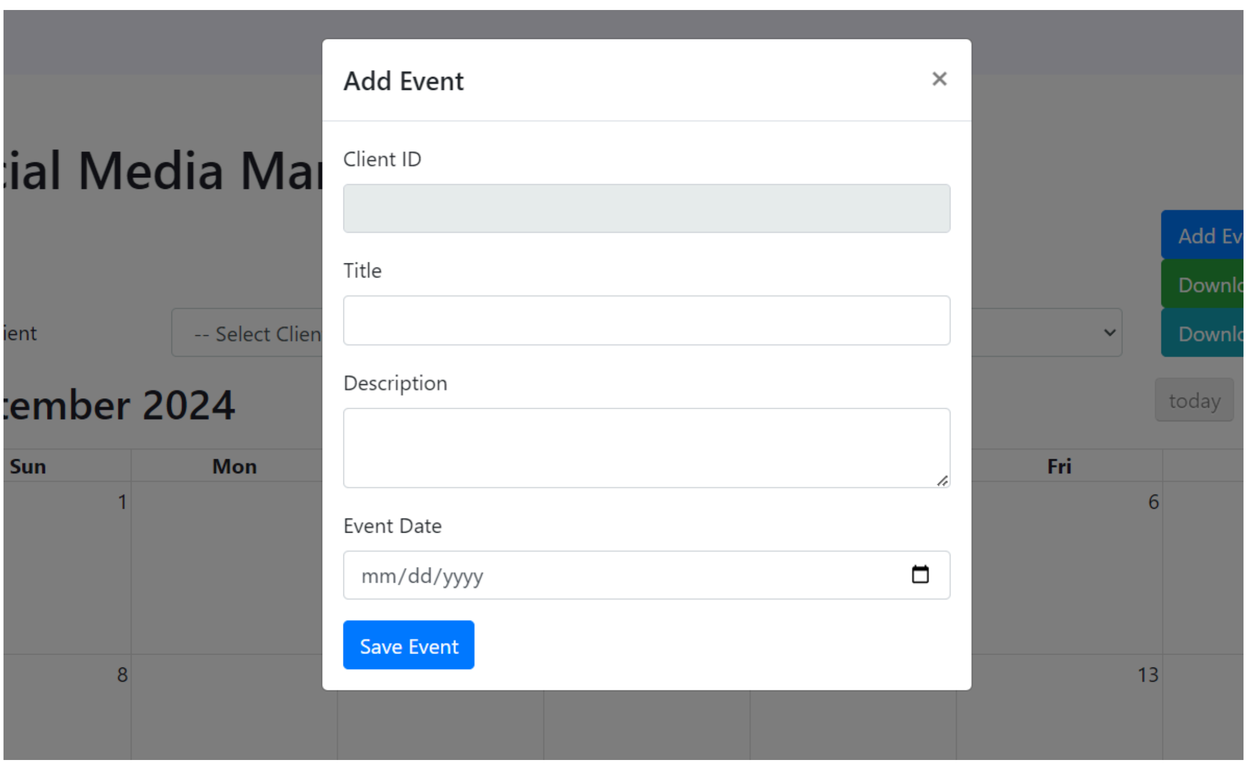
Client Management:



By entering the client name in the input field above and clicking the **Add Client** button, the client is added to the clients table, which is displayed at the bottom of the form.

Social Media Management:





The admin can add social media tags for specified clients by selecting a client from the **Select Client** dropdown menu and clicking the **Add Event** button. A popup will appear, allowing the admin to set the social media tags for the specified date. Additionally, the admin can view the social media engagements by selecting clients from the dropdown menu, and the data can be downloaded in both PDF and Excel formats.