📄 Nexus CRM-HRM Suite: Build Proposal

1. Executive Summary

Nexus is a unified, hybrid web application designed to streamline business operations by consolidating Customer Relationship Management (CRM), Human Resource Management (HRM), and Project Management into a single, intuitive interface. The current build focuses on role-based security, modern interaction design, and AI-driven productivity tools to replace manual spreadsheet workflows.

Your organization currently manages client onboarding, project tracking, team allocation, HR processes, attendance, EOD reports, and payment updates through multiple Google Sheets. This creates operational bottlenecks, data inconsistency, and limited visibility.

This proposal outlines the development of a **custom Hybrid CRM + HRM platform** that consolidates all workflows into one modern, interactive application. The solution will automate your processes, improve productivity, and give clients and internal teams a seamless experience.

2. Project Objectives

- Replace all manual Google Sheet processes with structured, automated workflows.
- Centralize CRM, HRM, project execution, communication, and reporting.
- Create distinct dashboards for clients, managers, team members, HR, finance, and admin.
- Deliver a modern UI with smooth interactions, animations, icons, and intuitive flows.
- Ensure full visibility for clients while keeping internal operations secure and private.
- Enable scalable handling of teams, projects, and multiple client accounts.

3. Key Features & Modules

🔐 Security & Access Control

- **Role-Based Access Control (RBAC)**: distinct, secure environments for four key roles: **Admin, Project Manager (PM), Team Member, and Client**.
- **Two-Factor Style Login**: A secure entry flow requiring account selection followed by password authentication (123456).

- **Mock Secure Session**: Simulated session handling with timeout and logout capabilities.

📊 Dashboard & Analytics

- **Admin Command Center**: Real-time widgets for Total Revenue (YTD), Active Projects, and Workforce Count. Includes interactive charts for Productivity Trends and Project Status Distribution.
- **Client Portal**: A dedicated view for clients to track project progress, view onboarding checklists (e.g., "Contract Signed"), and monitor invoice status.
- **PM Overview**: High-level insights into Project Health, Team Capacity, and Upcoming Deadlines.

🚀 Project & Task Management

- **Interactive Kanban Board**: A fully functional drag-and-drop task board (Todo, In Progress, Review, Done) with priority tagging (Critical, High, Low).
- **Project Timeline View**: Visual progress bars, status badges (Active, Delayed, Completed), and team allocation indicators.
- **My Tasks**: Personalized task lists for individual team members to focus on daily deliverables.

🤖 AI-Powered Productivity

- **Smart EOD Reporting**: Integrated **Google Gemini AI** that automatically summarizes raw daily notes into professional, bulleted End-of-Day reports.
- **Report History**: A searchable and sortable archive of past EOD submissions for performance tracking.

💰 Finance Module

- **Invoice Management**: Track invoices with color-coded statuses (Paid, Pending, Overdue).
- **Revenue Tracking**: Visual breakdown of total vs. pending revenue for Admin users.
- **Client Payments**: View-only interface for clients to check outstanding balances and payment history.

👥 Human Resource Management (HRM)

- **Employee Directory**: A searchable list of all staff members with their roles and status.
- **User CRUD**: Admins can **Add, Edit, and Delete** employees directly from the UI.
- **Read-Only Views**: Project Managers have view-only access to team structures without administrative privileges.

4. UI/UX & Technical Specifications

- **Visual Identity**: Clean, "Inter" font-based typography with a professional slate and indigo color palette.
- **Mobile-First Design**: Fully responsive layout with a collapsible sidebar, touch-friendly navigation, and mobile-optimized tables.
- **Local State Management**: Instant interaction feedback (optimistic UI) for task moving and user updates.

5. Project Timeline

Estimated timeline: it will be finished after the confirmation of the requirements.

6. Deliverables

- Fully functional CRM + HRM hybrid application
- Admin, PM, Team Member, HR, Finance, Client dashboards
- Documentation (User Guide + Admin Guide)
- Training sessions
- Maintenance & support plan