* **WEBSITE FEATURES AND FUCTIONALITIES**
* **Super Administrative Panel**
* **Sign in**

Admin can login into the system.

* **Users Account creation and Management**

User Admin can create the account of the **regional** and **relationship** managers. Account can be created in two ways:

1. **Manual one by one**

In this method admin can create account of users one by one by entering required info.

1. **Auto process in bulk**

In this method admin can collect the users’ details in required format of excel sheet then just upload this sheet into the system and system will auto create the account of the users in one go.

* Admin can also view all added regional and relationship managers and their account details, ticket distribution statistics.
* After creation of account an URL to access their account will be auto sent to created account of user’s email ID.
* **Ticket Management**

This module will allow the admin to manage the tickets into system for following functionality:

* Admin can import an excel sheet to input the all tickets into the system they have.

NOTE: this excel sheet in a specific format will be provided by the Paciolan to us. We need this sheet before the development start.

* Admin can further distribute the tickets to the regional managers.
* **Sub Admins Management**

Admin can add sub admins into the system like as an assistant to manage the regional/relationship managers and client. This would help the admin to manage the other type of users into the system if number of users increase and a single admin is not able to manage them.

* **Reports**

Report module will allow the Admin to generate the real time reports for:

* Registered client’s statistics Daily/Weekly.
* Confirmed booked tickets statistics Daily/Weekly.
* Ticket distribution statistics with ticket confirmed for each regional and relationship manager.
* Admin can edit/deactivate any Regional manager, relationship manager or client.
* Access of All Permission of Regional Manager
* Access of All Permission of Relationship Manager
* Admin can change his password.
* Admin can logout from the account.

**NOTE:** If Admin add any client direct, admin can also manage them directly.

* **Regional Manager**
* Regional Manager will have the email of the URL and login credentials to access their account and will need to enter the login credentials to enter into his account.
* **Relationship Manager’s Account Creation & Management**

Regional Manager would be able to manage the relationship manager for following functionalities:

* **Add Relationship manager** into the system and automatically relationship manager would be associated under this regional manager in hierarchy.
* Relationship manager can be added with any one method of two available methods as explained in admin section

Manual one by one

Auto process in Bulk

* An auto generated email will be sent to therelationship manager to access their account.
* Regional manager can edit/deactivate any relationship manager.
* **Ticket Management**
* Regional Manager can view the all tickets assigned to him by Admin.
* Can view the further distributed tickets to relationship managers after his request and also disapproved one.
* Can view the confirmed tickets by clients under each relationship manager.
* **Ticket Request Approval**

Regional manager can view the all request of the tickets received from the relationship manager for client and can approve or disapprove them.

* **Reports**

Regional Manager would be able to see real time reports and generate reports for daily/weekly of:

* Number of client added under each relationship manager.
* Number of request relationship manger sent and how many get approved and disapproved by regional manager.
* Number of approved invitations from clients for each relationship manager.
* Regional manager can edit/deactivate any Relationship Manager and client.
* Access of All Permission of Relationship Manager
* Regional Manager can change his password.
* Regional Manager can logout from the account.
* **Relationship Manager Panel**
* Relationship Manager will have the email of the URL and login credentials to access their account and will need to enter the login credentials to enter into his account.
* **Client Management & Account Creation**

Relationship manager would be able to add the client one by one **manually** by providing initial information. Relationship manager can also add the clients in **bulk** by uploading the excel sheet in defined format with required details.

* On creation of account of client, an auto generated email will be sent to the client with URL and login credentials to access their account.
* Relationship manager can edit/deactivate any client account.
* **Ticket Management**
* Relationship Manager can **send ticket request to their Regional** Managers for their registered clients.
* On receiving approval on their requested tickets, relationship manager further **will send the invitation to their clients**.
* On receiving the further confirmation on invitation on invitation system will automatically update the system for approval or relationship manager can **manually approve or disapprove**.

* **Reports**

Relationship Manager would be able to see real time reports and generate reports for daily/weekly of:

* Number of client added by him.
* Number of request sent to regional manager and how many get approved and disapproved by regional manager.
* Number of approved invitations from clients.
* Relationship manager can edit/deactivate any client.
* Regional Manager can change his password.
* Regional Manager can logout from the account.
* **Client Panel**
* Client will have an email of the URL and login credentials to access their account and will need to enter the login credentials to enter into his account.
* Client can see the invitations of the sessions and need to confirm it.
* Client will also receive the all email of invitation and by clicking on it will take the users to their account page to login.
* Then client need to enter the following info and send the confirmation back to the relationship manager.
* Client can view the all tickets for which they received the invitation and can view the status or approval and disapproval. Client can also view their past status marked and can change the status of disapproved one.
* System will auto send the follow ups for some fixed repetition set by admin to client to ask them to view the invitations and to approve it.

**Multi Lingual**- System will be developed in multiple languages which are English, Portuguese, French and Spanish.