# Internal-CRM User Manual

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# 1. Welcome to IOBIX Internal CRM

Welcome to the IOBIX Internal CRM! This system is designed to streamline business operations by managing employees, partners, clients, and vendors efficiently. The CRM includes multiple dashboards tailored to different user roles, ensuring smooth collaboration and project management.

# 2. User Roles & Access

| Role | Who Are They? | Accessible Modules |
|---|---|---|
| Admin | Only the Director can access this panel. | Manages all master tables, employees, partners, clients, vendors, projects, inquiries and View ALL calendars. |
| Employee | IOBIX team members (IT & Business Development departments). | Tasks, Attendance, Leave (BD employees also have Project and meeting calendar access). |
| HR | HR Personnel managing employee records, attendance, and leave. | Approves leave, tracks attendance, manages meeting calendars, and oversees employee data. |
| Partner | Business partners generating leads (e.g., Roger from INFLU APP). | Project creation, task assignment, meeting calendar and communication. |
| Client | Business clients (e.g., AURA, SATTRIX). | ICP Form (Ideal Customer Profile), meeting calendar and Project management. |
| Vendor | External vendors supporting projects (e.g., digital marketing). | Project creation, task assignment, meeting calendar and communication. |

# 3. Registration & Sign-In Process

### For Admin

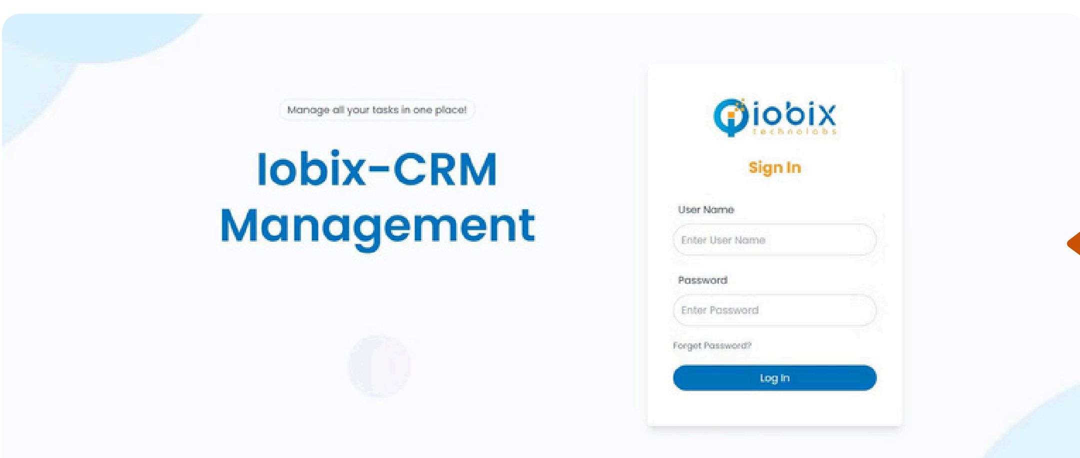
- Static login: Only the Director has predefined credentials.

### For Employees, HR

- Register: Register by the Admin or HR.
- Email Verification: A link to set a password will be sent to your email.
- Sign In: Use your registered email and password to log in.

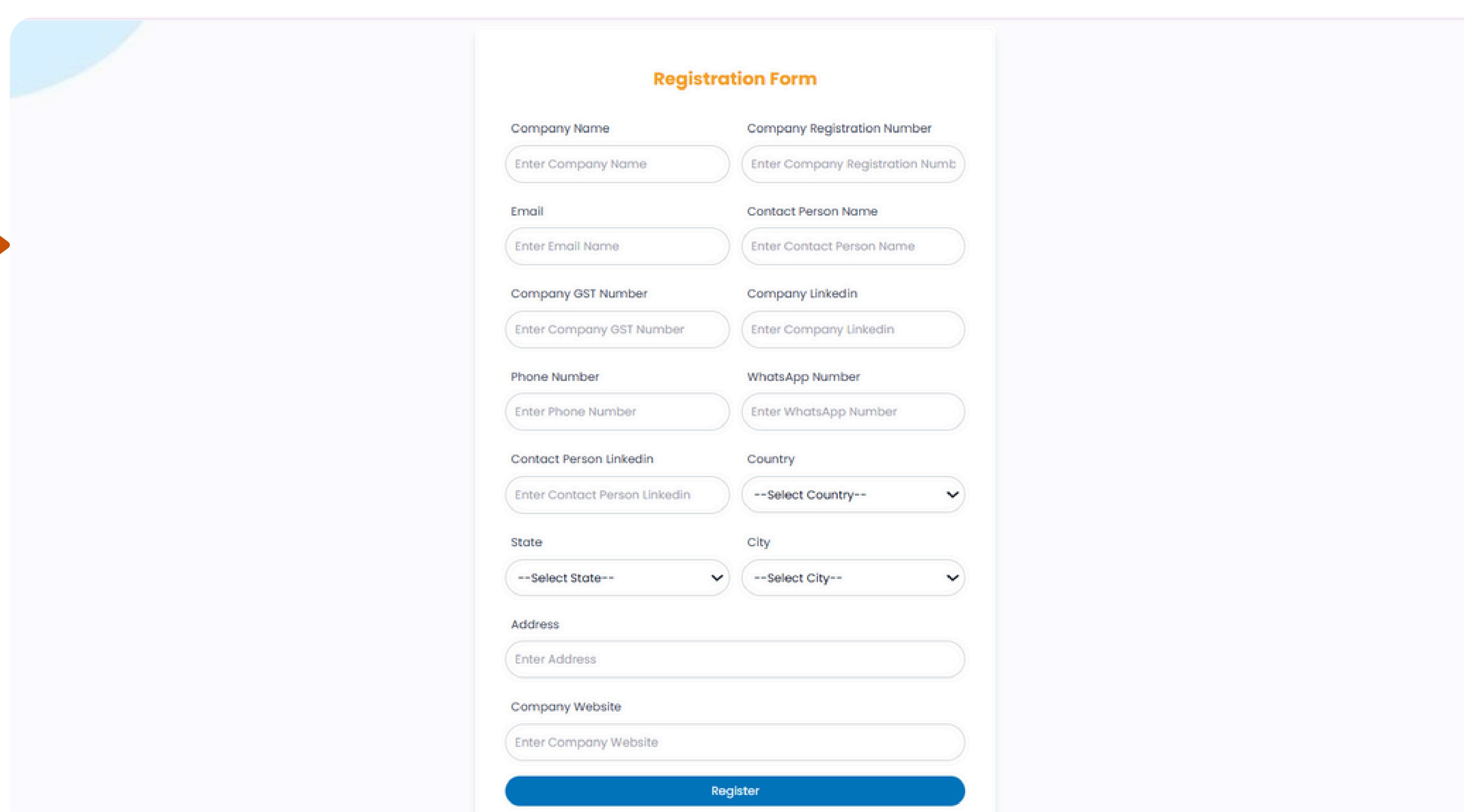
### For Partners, Clients, and Vendors

- Register: Fill out the respective registration form (Partner/Client/Vendor).
- Email Verification: A link to set a password will be sent to your email.
- Sign In: Use your registered email and password to log in.




**Login Page**

**Registration Form**



# 4. Module Guide

## 4.1. Admin Panel Guide

### Key Features:

**Master Tables Management**
Department, Designation, Leave Types, Holidays, Inquiry Types, Inquiry Sources.

**User Permissions**
Grant inquiry access to employees/admins.

**Employee Management**
Register employees, manage tasks, attendance, leave, and projects.

**Partner/Client/Vendor Management**
Approve registrations and oversee communications.

**Project Management**
Create projects, assign tasks, and use the chat module for collaboration.

**Calendar Management**
View All meetings across all panels and Schedule the meetings with employee, partner, client and vendor

### Steps to Use:

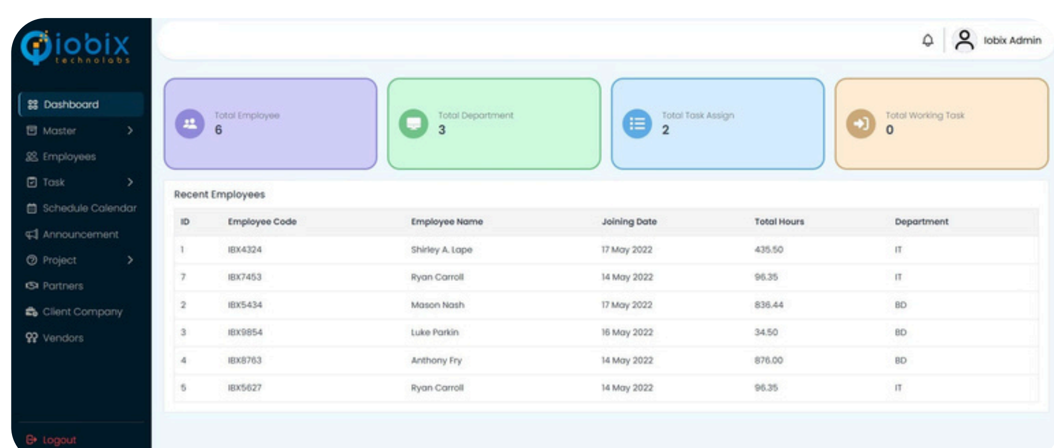
1. Login

2.Navigate to Master Tables to set up departments, leave policies, etc.

3.Go to Employee Management to add or edit employee details.

4.Use the Project Module to create and track projects.

5. Use the Schedule Calendar to create meetings, track meetings and receive automated reminders 2hrs before meetings.




Admin Dashboard

# 4.2. Employee Panel Guide

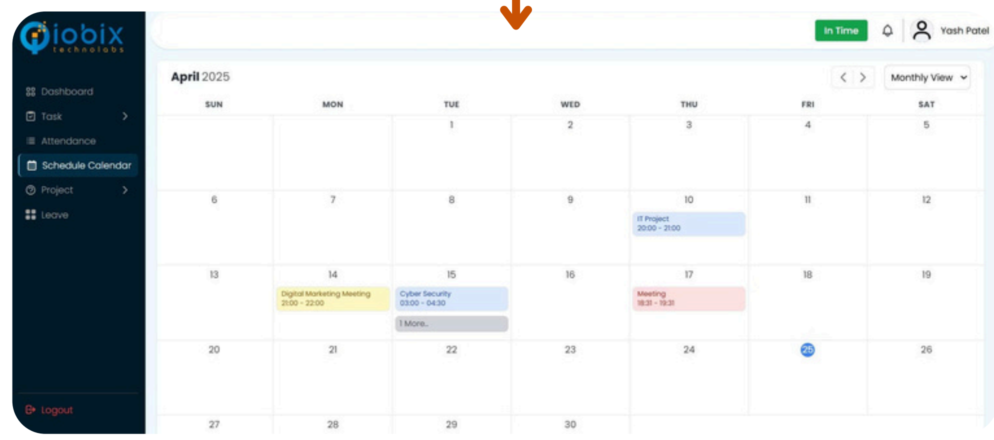
## Modules:

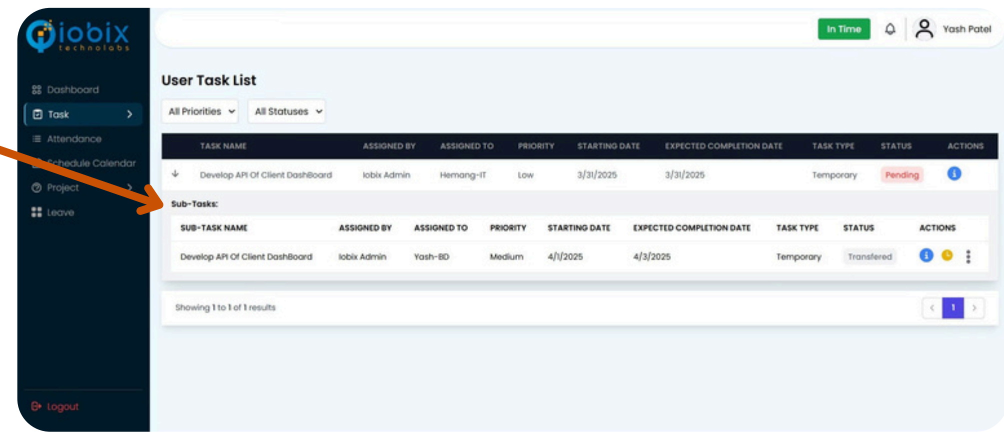
- Tasks: Assign, track, and transfer tasks.
- Attendance: Log daily in-Time/out-Time times (affects salary calculations).
- Leave: Apply for leave (balance impacts salary).

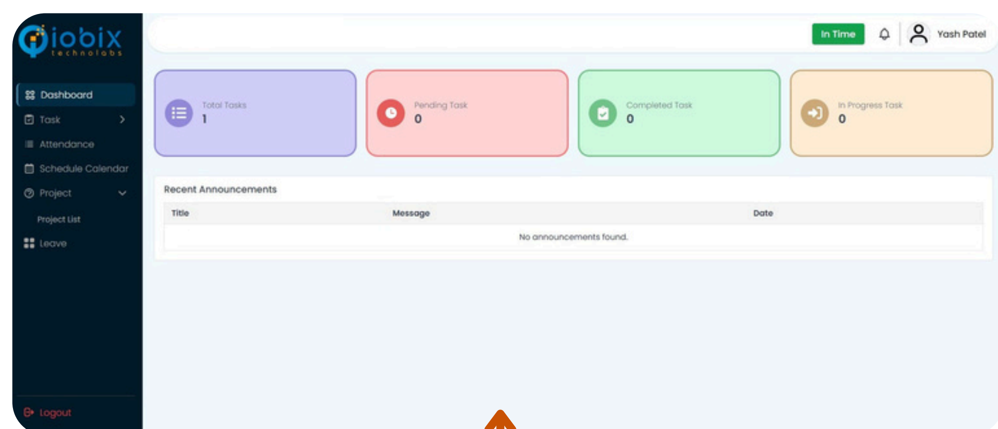
## For BD Department Employees:

- Projects: Create/manage projects, assign tasks, and chat with stakeholders.

  Schedule Calendar: Create/manage meetings and view all panels calendar.




## Steps to Use:

1. Log in and check in/out under Attendance.
2. Log in and check in/out under Attendance.
3. Submit leave requests via the Leave Module.
4. Use the Task Module for daily work tracking.
5. Use the Schedule Calendar to create meetings, track meetings and receive automated reminders 2hrs before meetings.

# 4.3. HR Panel Guide

## Key Features:

Employee Management

- View and edit employee profiles.
- Approve/Reject employee leave requests.
- Track attendance and working hours.

**Attendance & Leave Management**

- Monitor daily check-in/check-out logs.
- Generate attendance reports (impact on payroll).
- Manage leave balances (casual, sick, etc.).

**Meeting Calendar**

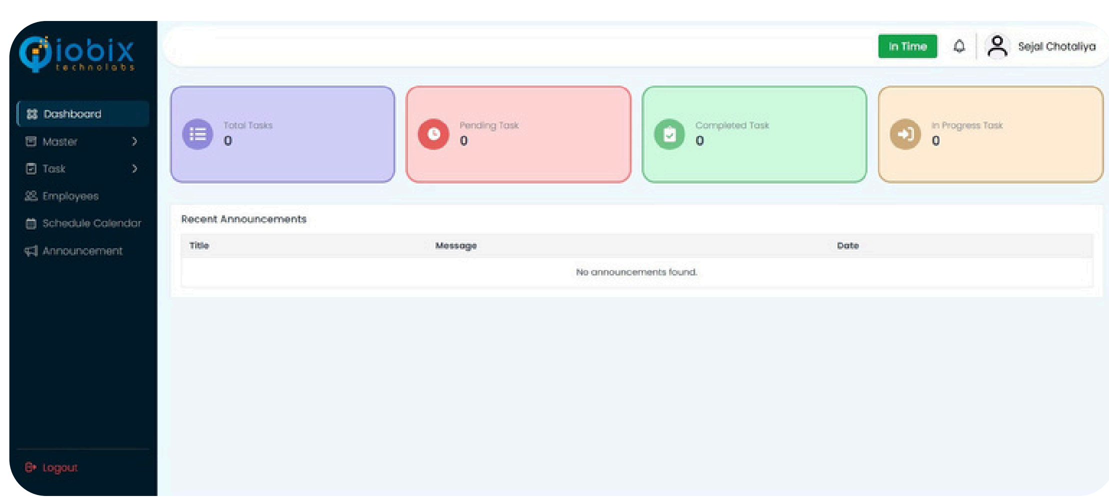
- View Admin-Employee meetings.
- Schedule and notify employees about meetings.

**Task Module (Same as Employee Panel)**

- Assign, track, and transfer tasks.

## Steps to Use

1. Login
2. Attendance Module: Check employee logs.
3. Leave Module: Approve/reject leave applications.
4. Calendar: Track the admin and employee meetings.
5. Task Management: Assign tasks to employees if needed.



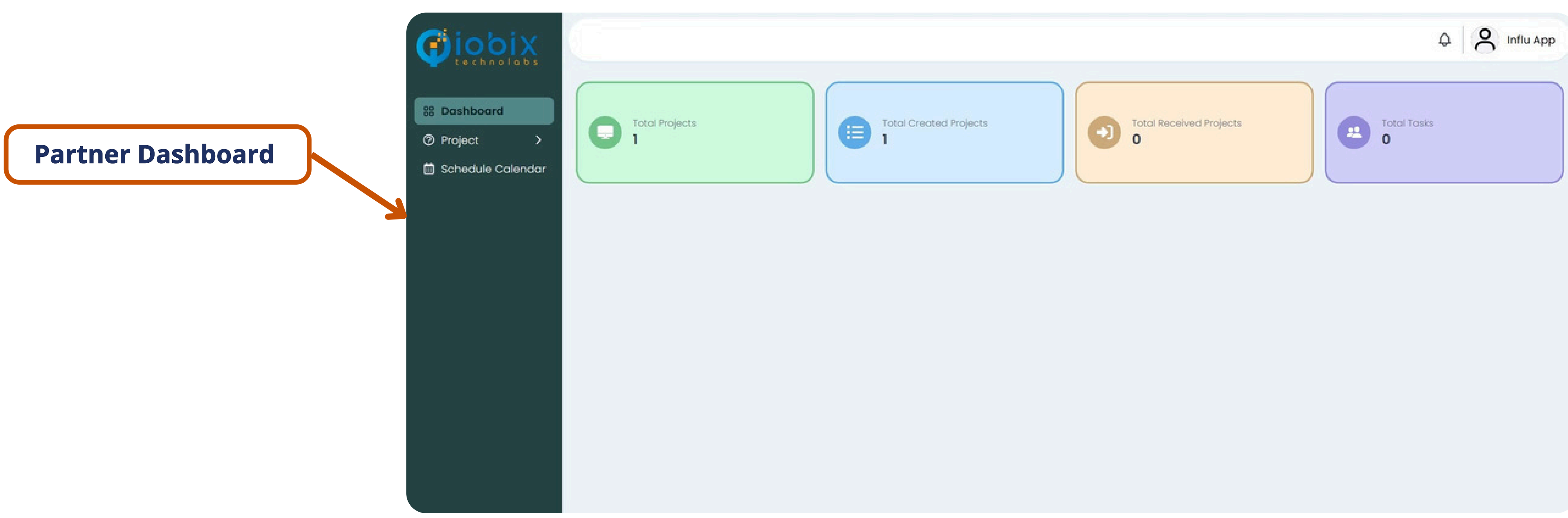
# 4.4. Partner Panel Guide

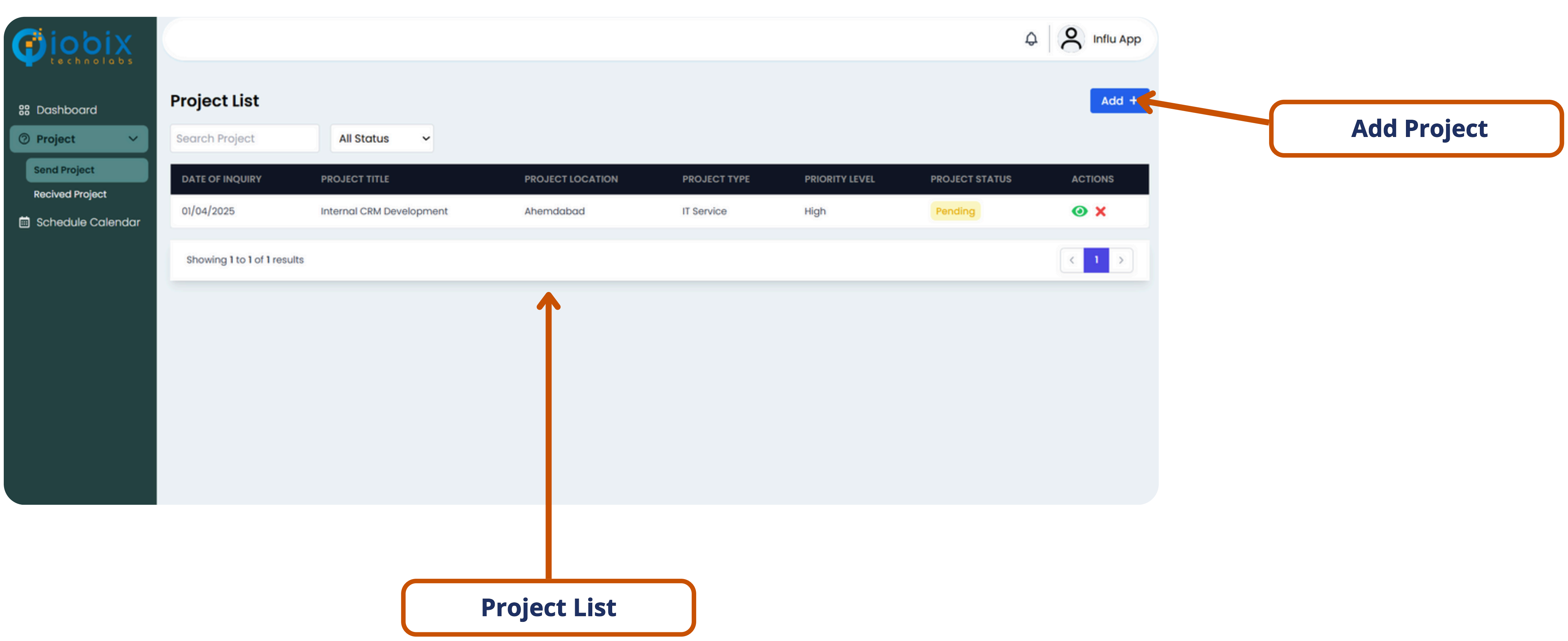
## Modules:

- Projects: Create/cancel projects (before approval), assign tasks, and communicate via chat.
- Schedule Calendar: Create meetings and track meeting calendar.

## Steps to Use:

1. Register and log in.
2. Create a project or assign tasks under Projects.
3. Use the Chat Module to discuss with admins/employees.
4. Use the Schedule Calendar to View only their assigned project meetings and receive automated reminders 2hrs before meetings.



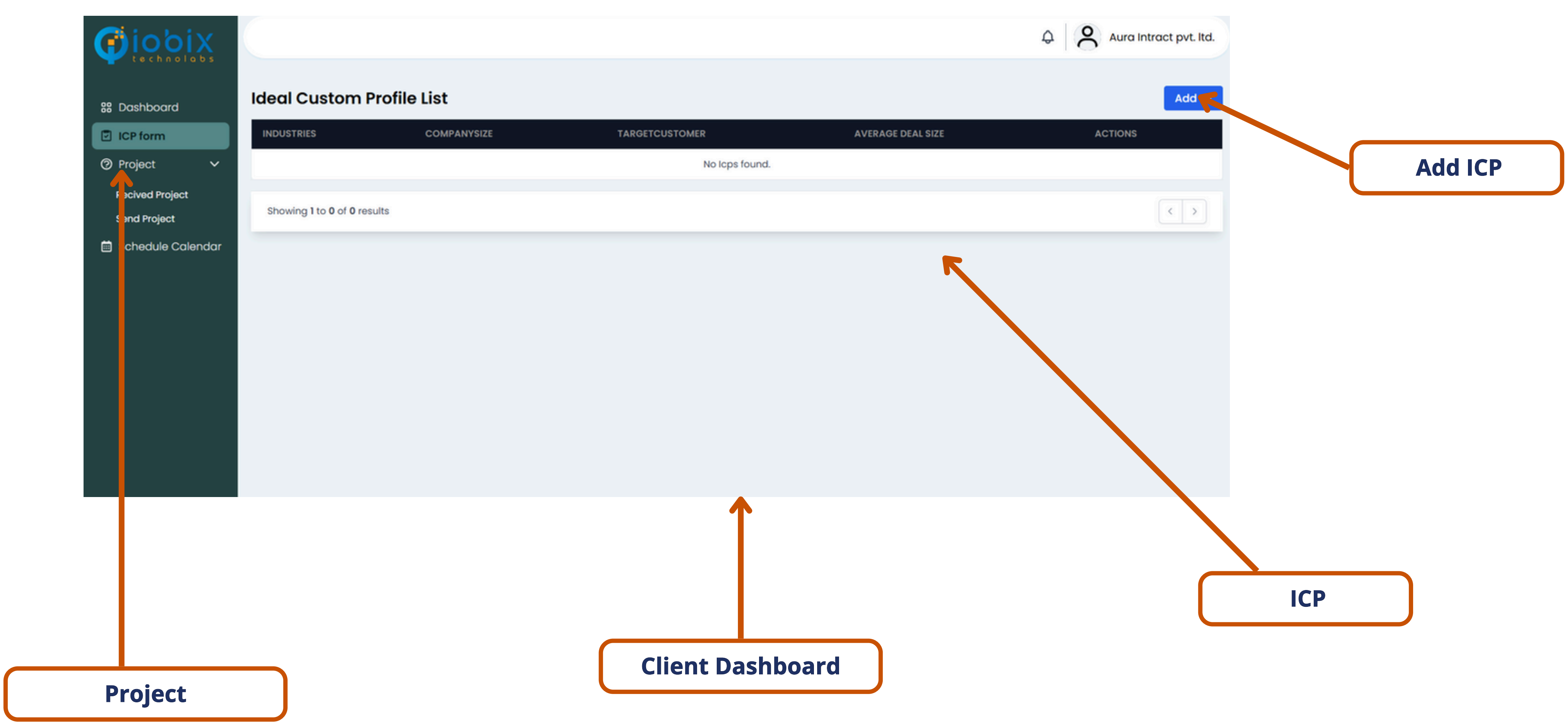
# 4.5. Client Panel Guide

## Modules:

- ICP Form: Define your target audience after the first login.
- Projects: Create tasks, track progress, and chat with the team.
- Schedule Calendar: Create meetings and track meeting calendar.

## Steps to Use:

1. Register and log in.
2. Complete the ICP Form after registration.
3. Navigate to Projects to manage tasks and communications.
4. Use the Schedule Calendar to View only their assigned project meetings and receive automated reminders 2hrs before meetings.



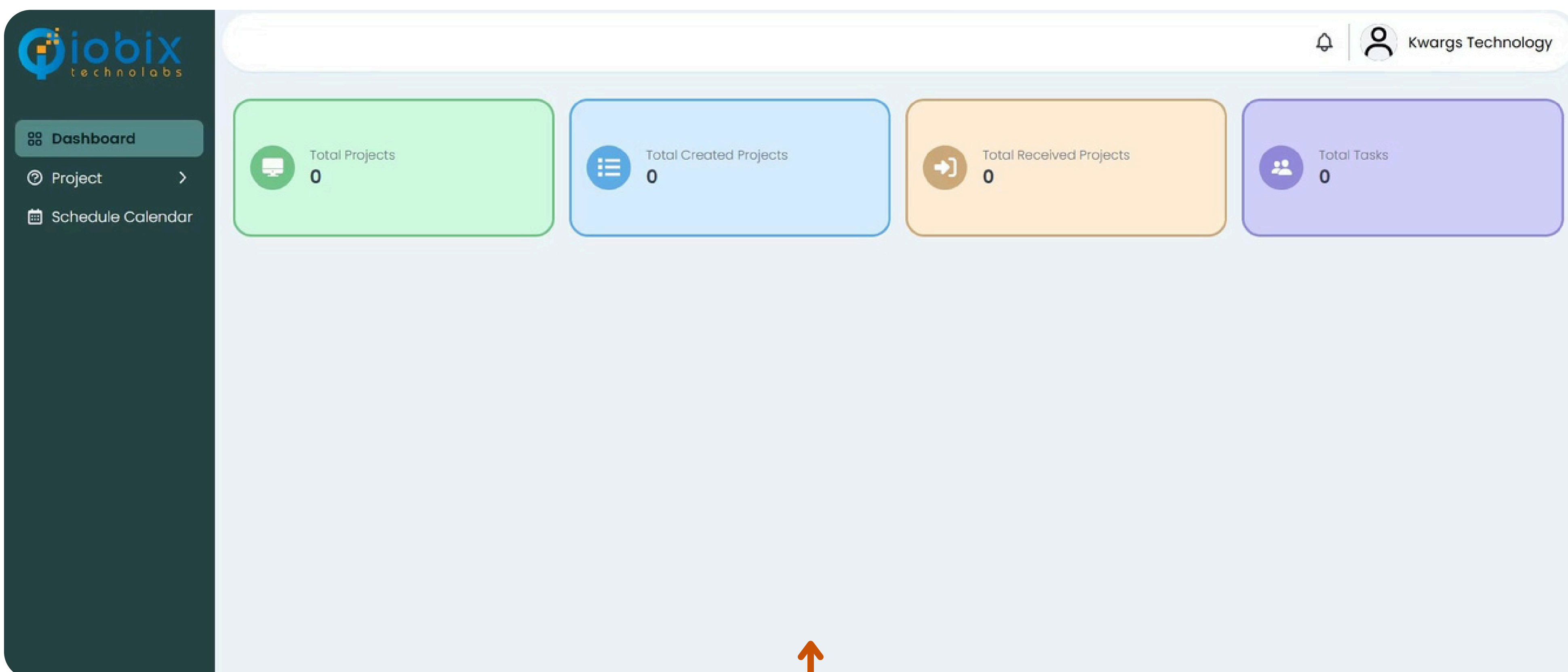
# 4.6. Vendor Panel Guide

## Modules:

- Projects: Create tasks, track progress, and chat with admins/employees.

## Steps to Use:

1. Register and log in.
2. Access Projects to manage assigned tasks.
3. Use the Schedule Calendar to View only their assigned project meetings and receive automated reminders 2hrs before meetings.




**Vendor Dashboard**

# 5. Project Flow Overview

### Project Creation

Admin/BD Employee/Partner/Client/Vendor creates a project.

### Task Assignment

Tasks are assigned to employees/vendors/Partner/Client.

### Communication

All stakeholders discuss via the **Chat Module**.

### Tracking & Approval

Admin monitors progress; partner/clients/vendors view updates.

# Troubleshooting & Support

### Forgot Password?

Use the "Reset Password" link on the login page.

### Access Issues?

Contact the Admin (Director).

### HR Support

Email hr@gmail.com

### Technical Errors?

Email IT support at [IT Support Email].