

DMS

Permissions:

Rights of Super Admin

1. Right to view, edit and add admins and users
2. Right to change permissions of users
3. Right to Suspend or activate Suspended Users
4. Right to view, edit, delete, add and upload data
5. Right to generate and export report (.xlsx and .pdf)
6. Right to view assigned data to all users (with remarks and follow-ups)
7. Right to view unassigned data

Rights of Admin

1. Right to view, add, upload and edit data
2. Right to generate and export report (.xlsx and .pdf)
3. Right to assign data to users

Rights of Sales Representative

1. Right to view and work on Assigned Data (Add remarks, follow-ups and lead status)
2. Right to add remarks and follow-ups on the assigned data
3. Right to generate report of assigned data with remarks and follow-ups

Type of Data to be uploaded on DMS

1. Server Data
2. Facebook Leads
3. Google Leads
4. Website Leads

Super Admin Login:

1. **Dashboard**
2. **Users**
 - a. View Users
 - b. Add Users
 - c. Edit Users (with permissions)
3. **Data**
 - a. View Data
 - b. Add Data (Single and Bulk Upload)
 - c. Edit Data
4. **Reports**
 - a. View Assigned Data (with users)
 - b. View Unassigned Data
 - c. Generate Report (Country Wise, Duration Wise, Year Wise, Month Wise, Vendor Wise, Data Wise) with multiple check boxes to select within reports

Admin Login:

1. **Dashboard**
2. **Data**
 - a. Add Data (Single and Bulk Upload)
 - b. View Data
 - c. Edit Data
 - d. Assign Data (Country Wise, Duration Wise, Year Wise, Month Wise, Vendor Wise, Data Wise) with multiple check boxes to select while assigning
3. **Reports**
 - a. View Assigned Data
 - b. View Unassigned Data
 - c. Generate Report (Country Wise, Duration Wise, Year Wise, Month Wise, Vendor Wise, Data Wise) with multiple check boxes to select within reports

Sales Representative Login:

1. **Dashboard**
2. **Data**
 - a. View Assigned Data (With remarks and follow-ups field and lead status)
 - b. Today's Follow-Ups
3. **Reports**
 - a. Generate Report (Country Wise, Duration Wise, Year Wise, Month Wise, Vendor Wise, Data Wise) Assigned data with remarks, follow-ups and lead status with multiple check boxes to select within reports