The CRM tool should provide a Project Management interface for the clients who will be placing web development requests with ASEC. There will be multiple clients and each client can have multiple orders sent to ASEC for Development.

Each client will have a sales person who will fill in the following for their Orders. It will be specific for each client and the Admin should be given rights to alter the form fields so that when we get a new client we should be able to create it for them. Ie each form customized.

1. Order Form
2. Revision Form
3. Cancellation form
4. Launch form

All other information will be as files which will be uploaded in the files area . Also all conversation on the project updated in the conversation area.

Asec will have multiple teams and the orders received should be managed team wise and under each team developer wise.

Each Asec developer working on an order will fill in the following:

1. Time line chart
2. Site Content. ( additional fields provided for the asec user to add fields)

All other information will be as files which will be uploaded in the files area . All conversation on the project updated in the conversation area.

**Admin control:**

Admin user - > create clients

Create client users for each client

Create TL control/Support/CSR control

Create Developer/Proofer /DT and Audit

Manage Users -> Manage orders

**Client Login:**

1.The client Login and lands at the Order page

2. All the orders for that particular client will be listed in this page. The columns will be as follows:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Account number | Account Name | Account Manager | status | Order type | Site Type | Latest Update |  | |
| 1237124 | ABC | Keelan | Order status | Broadcasting | Custom | 24th April 10:00 am | Revision form | Cancellation Form | | Launch Form |
| I237452735 | XYZ | Adam | Published | Newspaper | Standard | 12th March 12:00 am | Revision form | Cancellation Form | |  |

The client sales person should be able to click on the Order form and take a new order which will be added in the database and reflected in the orders listed.

The Orders listed should have the option to be filtered by:

1. Account Manager
2. Category
3. Status/stage

The Revision form and cancellation form and Launch form should open up when they click on the respective buttons.

The Latest update should keep flickering till its opened and viewed by the user who has loged in.

Order form/Revision form /launch form attached.

**Dash Board page:**

When the client sales person clicks on the order number it should take them to the Dashboard page.

1. The Dash board page is white labeled with Client Logo
2. The Dash board will have the following:

Order Detail ( will be taken from the order form)

Site Content ( will be filled by the ASEC user at the backend. So a entry form should be created in the back end. The details for this form attached)

Launch Details will be taken from the launch form)

Time Line (will be created by ASEC user in the backend. So an entry form to be created in the back end. The time line sample attached)

Conversation:

All communication on the project with the group involved in the project should be displayed with the date and time. An automatic notification email sent to all the people in the group when a new conversation is added.

Files:

Same as above.