| SL | MODULES | SUB MODULES | ACTIVITIES | ATTRIBUTES/ BUSINESS LOGIC | PERFORMED BY ROLE | FEATURE TYPE | PRIORITY | STATUS | QA STATUS |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Login & Registration | Login | User Authentication | - Email<br>- Password<br>- Standard Authentication Laravel | Everyone | Existing | High | Completed | |
| | | | 2FA | - Two Factor Authentication (New) | Everyone | New | High | Pending | |
| | | Registration | Manual Registration | - Name<br>- Email<br>- Password<br>- Confirm Pass | Everyone | Existing | High | Completed | |
| | | | SSO Registration | - Gmail Integration (New) | Everyone | New | High | Completed | |
| | | | Forget Password | - Email | Everyone | Existing | High | Completed | |
| | | | | | | | | | |
| 2 | Users | Role & Permission | Roles will defined. No add or delete is required. | User Role:<br>- Company Admin<br>- Project Manager<br>- Assginee<br>- Clients<br><br>- Management (New) (v2.0)<br><br>Managed from SmartFlow Admin UI (v2.0) | SmartFlow Admin | New | High | Completed | |
| | | Add/Edit/Delete/View Customer Admin information<br><br>Search User | | - Name<br>- Email<br>- Pass | SmartFlow Admin | New | High | Completed | |
| | | User Notification Manage | In App Notificaiton can't be disabled.<br><br>Email/**Whatsapp** Nofication can be enable/disable by End User | Dynamicallly manage as per configuration from user demand (New) | Company Admin Assginee Management Project Manager Clients | New | High | Pending | |
| | | | | | | | | | |
| 3 | Settings & Configurations | Currency Settings | Can set currency | - Format Options<br>- Default Currency<br>- Decimal Places<br>- Symbol Position<br>- Decimal Separator<br>- Thousands Separator<br>- Add Space | Company Admin | Existing | High | Completed | |
| | | Email Setup | Configure Email Server Settings for Notifications and Communications | - Email Provider<br>- Mail Driver<br>- SMTP Host<br>- SMTP Port<br>- SMTP Username<br>- SMTP Password<br>- Mail Encryption<br>- From Address<br>- From Name | SmartFlow Admin<br>Company Admin | Existing | High | Completed | |
| | | Notification Management | In App & Whatsapp Notification Template | - Notification Type<br>- Notification Title<br>- Notification Content<br>- Available Variables | SmartFlow Admin | Existing | High | Completed | |
| | | | Notication Templates for Email | - As is it | SmartFlow Admin | Existing | | Completed | |

| SL | MODULES | SUB MODULES | ACTIVITIES | ATTRIBUTES/ BUSINESS LOGIC | PERFORMED BY ROLE | FEATURE TYPE | PRIORITY | STATUS | QA STATUS |
|---|---|---|---|---|---|---|---|---|---|
| | | | Nofication Settings | Platform:<br>- In App Nofication (Same as in SmartFlow) (New)<br>- Email Notification<br>- Whatsapp Notification (New)<br><br>Action (Enable/Disable):<br>- Workspace Invitation<br>- Project Assignment/Unassignement (New)<br>- Task Assignment/Unassignement (New)<br>- Bug Assignment/Unassignement (New)<br>- Expense Notification<br>- Invoice Notification<br>- Status Change (New)<br>- Task Overdue (New)<br>- Approaching Deadline (New)<br>- Auto Mail on Subscrition (New)<br>- Auto Mail before the Subscription Expiration (New)<br>- Meeting Notification (New) | Company Admin | New | High | Pending | |
| | | Third Party App Integration | API Integration | - Zoom Integration<br>- Google Meet Integration (New)<br>- Google Calender Integration (New)<br>- Google Mail Integration (New)<br>- Whatsapp Integration (New) (V1.0)<br>- ChatGPT Integration<br>- UYSys LLM (New) | SmartFlow Admin<br>Company Admin | Planned | High | To Do | |
| | | | | - Payment Gateway Integration (Stripe/SSLCommerz) (New) | SmartFlow Admin | New | High | Pending | |
| | | Brand Settings | Logo | | SmartFlow Admin | Existing | | Completed | |
| | | | Text | | SmartFlow Admin | Existing | | Completed | |
| | | | Theme | | SmartFlow Admin | Existing | | Completed | |
| | | System Settings | Default Language | Except Bengali | SmartFlow Admin | Existing | | Completed | |
| | | | Date Format | | SmartFlow Admin | Existing | | Completed | |
| | | | Time Format | | SmartFlow Admin | Existing | | Completed | |
| | | | Calendar Start Day | | SmartFlow Admin | Existing | | Completed | |
| | | | Default Timezone | | SmartFlow Admin | Existing | | Completed | |
| | | | Email Verification | - Require users to verify their email addresses | SmartFlow Admin | Existing | | Completed | |
| | | | Landing Page | - Enable or disable the public landing page | SmartFlow Admin | Existing | | Completed | |
| | | Storage Settings | Local Storage | - Allowed File Types<br>- Max Upload Size (KB) | SmartFlow Admin | Existing | | Completed | |
| | | Cache Settings | Clear Cache | | SmartFlow Admin | Existing | | Completed | |
| | | | | | | | | | |
| 4 | Workspaces | All Workspace | Create/Edit/Delete/View/Leave/Search Workspace | | Company Admin | Existing | | Completed | |
| | | | Invite Member | Process Completed but email not working properly | Company Admin | Existing | High | Pending | |
| | | | | | | | | | |
| 5 | Projects | Projects List | Project Create/Edit/Deleted | - As it is to Taskly | Company Admin<br>Project Manager | Existing | High | Completed | |
| | | | Project Details | - As it is to Taskly<br>- Clients Details: Clients Name, Contact Info, Stackholder Info, Contract Value (New) (v2.0) | Company Admin<br>Project Manager<br>Management | New | | Completed | |

| SL | MODULES | SUB MODULES | ACTIVITIES | ATTRIBUTES/ BUSINESS LOGIC | PERFORMED BY ROLE | FEATURE TYPE | PRIORITY | STATUS | QA STATUS |
|---|---|---|---|---|---|---|---|---|---|
| | | Resource Utilization | Same as SmartFlow | - SL<br>- Resource Name<br>- Designation<br>- Assign Project<br>- Total Task<br>- Complete Task (New)<br>- Active Task | Company Admin<br>Project Manager | Planned | High | Pending | |
| | | | | | | | | | |
| 6 | Tasks | All Tasks | Add/Edit/Delete/View/Search | - As it is to Taskly<br>- Task Estimated Time (H/M) (New) (v2.0) | Company Admin<br>Project Manager Assginee | New | High | Completed | |
| | | | Seperated Section as Per Task Categories | - Different sections for different type of task (New) (v2.0) | Company Admin<br>Project Manager Assginee | Planned | | To Do | |
| | | | In Line Task Details Update | - In Line Task Update e.g.: Title, Status, Assignee | Company Admin<br>Project Manager Assginee | Planned | | To Do | |
| | | | Task Log | - Task Life cycle from srat to end with name , date time, user pic, status details (New) | Company Admin<br>Project Manager Assginee | New | High | Pending | |
| | | | @Mention team members | - User can mention another user (New) | Company Admin<br>Project Manager Assginee | New | High | Pending | |
| | | | Upload Files | - Select from existing file library<br>- File upload from local storage (Select/drag and drop) (New) | Company Admin<br>Project Manager Assginee | New | Medium | Pending | |
| | | | Drag and Drop Tasks | - List View Drag & Drop Feature (New) | Company Admin<br>Project Manager Assginee | New | Medium | Pending | |
| | | Task Status | Create/Edit/Delete | - As it is to Taskly | Company Admin<br>Project Manager | Existing | | Completed | |
| | | | | | | | | | |
| 7 | Bugs | All Bugs | As it is to Taskly | - As it is to Taskly | Company Admin<br>Project Manager Assginee<br>Clients | Existing | | Completed | |
| | | Bugs Status | As it is to Taskly | - As it is to Taskly | Company Admin<br>Project Manager | Existing | | Completed | |
| | | | | | | | | | |
| 8 | Subscription Management | Setup & Configuration | Create/Edit/Delete/View Plans | - As it is to Taskly | SmartFlow Admin | Existing | High | Completed | |
| | | | On Demand Custom Plan | - Custom Plan creatation as per client request (New)<br>- Custom Plan will only applicable for specific user (New)<br>- Custom Plan won't show in the website (New) | SmartFlow Admin | New | High | To Do | |
| | | Plans | View Plans (Design & Functional Change) | - As it is to Taskly<br>- Current Plan (New)<br>- Activation Date (New)<br>- Renewal date (New)<br>- Usage limits vs. current usage. (New)<br>- Guide to Custom Plan (New) | Company Admin | New | High | Pending | |
| | | | Upgrade/Downgrade Plans | - As it is to Taskly | Company Admin | Existing | | Completed | |
| | | Plan Request | Approve/Reject Plan | - As it is to Taskly | SmartFlow Admin | Existing | | Completed | |
| | | | Request for Plan | - As it is to Taskly | Company Admin | Existing | | Completed | |
| | | Billing & Invoicing | Generate Invoices | - Auto-generate invoices upon successful payment. (New)<br>- Store invoice details (ID, date, amount, plan, payment status). (New) | SmartFlow Admin | New | High | Pending | |

| SL | MODULES | SUB MODULES | ACTIVITIES | ATTRIBUTES/ BUSINESS LOGIC | PERFORMED BY ROLE | FEATURE TYPE | PRIORITY | STATUS | QA STATUS |
|---|---|---|---|---|---|---|---|---|---|
| | | | Purchase History | - View of all past payments<br>- View all invoices (New)<br>- Filter (e.g. Date, Plan, Customer) | SmartFlow Admin<br>Company Admin | New | Medium | Pending | |
| | | | | | | | | | |
| 9 | Coupons | Create/Edit/Delete/View | As it is to Taskly | - As it is to Taskly | SmartFlow Admin | Existing | | Completed | |
| | | | | | | | | | |
| 10 | Currencies | Create/Edit/Delete/View | As it is to Taskly | - As it is to Taskly | SmartFlow Admin | Existing | | Completed | |
| | | | | | | | | | |
| 11 | Newsletters | Create/Edit/Delete/View | As it is to Taskly | - As it is to Taskly<br>- Custom Newsletter Creation (e.g. All, Group, Specific User) (New) (v2.0) | SmartFlow Admin | New | | Completed | |
| | | | | | | | | | |
| 12 | Contact Management | Contact Directory | Create New Contact | - Contact Type (Company/Individual) (New)<br>- Company Name (New)<br>- Name<br>- Designation (New)<br>- Email<br>- Phone (New)<br>- Website (New)<br>- Group (Client, Vendor, Partner, Lead) (New)<br>- Linked Projects/Leads (Auto-populated from respective modules) (New)<br>- Notes<br>- Avatar/Logo (Attachment) (New) | SmartFlow Admin<br>Company Admin | Planned | | To Do | |
| | | | Edit/Delete/View Contact | - Update/delete/View contact information (New) | SmartFlow Admin<br>Company Admin | Planned | | To Do | |
| | | Contact Groups | Create Groups | - Make contact lists (e.g., Client, Vendor, Partner, Lead) (New) | SmartFlow Admin<br>Company Admin | Planned | | To Do | |
| | | | Manage Group Members | - Add/remove contacts from groups (New) | SmartFlow Admin<br>Company Admin | Planned | | To Do | |
| | | | | | | | | | |
| 13 | Landing Page | | | As it is<br>- New as per Design | SmartFlow Admin | Existing | High | Pending | |
| | | | | | | | | | |
| 14 | Media Library | Add/Delete/View | As it is to Taskly | - As it is to Taskly<br>- List View (New) (v2.0)<br>- Filtering (e.g. Project, File Type) (New) (v2.0)<br>- Multi Select & Action (New) (v2.0) | Company Admin<br>Project Manager Assignee | Existing | | Completed | |
| | | | | | | | | | |
| 15 | Timesheets | My Timesheets | As it is to Taskly | - As it is to Taskly | Company Admin | Existing | Low | Completed | |
| | | Daily View | As it is to Taskly | - As it is to Taskly | Company Admin | Existing | Low | Completed | |
| | | Weekly View | As it is to Taskly | - As it is to Taskly | Company Admin | Existing | Low | Completed | |
| | | Monthly View | As it is to Taskly | - As it is to Taskly | Company Admin | Existing | Low | Completed | |
| | | Calendar View | As it is to Taskly | - As it is to Taskly | Company Admin | Existing | Low | Completed | |
| | | Approvals | As it is to Taskly | - As it is to Taskly | Company Admin | Existing | Low | Completed | |
| | | Reports | As it is to Taskly | - As it is to Taskly | Company Admin | Existing | Low | Completed | |
| | | | | | | | | | |

| SL | MODULES | SUB MODULES | ACTIVITIES | ATTRIBUTES/ BUSINESS LOGIC | PERFORMED BY ROLE | FEATURE TYPE | PRIORITY | STATUS | QA STATUS |
|---|---|---|---|---|---|---|---|---|---|
| 16 | Budget & Expenses | Budget & Expense Dashboard | Summary | - As it is to Taskly | Company Admin<br>Management<br>Project Manager | Existing | High | Completed | |
| | | | Filtering | - By Project (New)<br>- By Project Status (e.g. Ongoing, Completed) (New)<br>- By Project Manager (New)<br>- Data Range (New) | Company Admin<br>Management<br>Project Manager | New | High | Pending | |
| | | Budget | Add | - As it is to Taskly<br>- Attchments (New) (v2.0)<br>- Over Contract Value (New) (v2.0) | Company Admin<br>Management<br>Project Manager | New | | Completed | |
| | | | Edit/Delete | | Company Admin<br>Management<br>Project Manager | Existing | | Completed | |
| | | | Approval | - Approved by Management (New) | Management | Planned | | To Do | |
| | | | View | - As it is to Taskly<br>- Attachment (New) (v2.0) | Company Admin<br>Management<br>Project Manager | New | | Completed | |
| | | | Filtering | - By Project (New)<br>- By Project Status (e.g. Ongoing, Completed) (New)<br>- By Project Manager (New)<br>- Data Range (New) | Company Admin<br>Management<br>Project Manager | New | Medium | Pending | |
| | | Expense | Add | - As it is to Taskly<br>- Attachments (New) | Company Admin<br>Project Manager Assginee | New | High | Pending | |
| | | | Edit / Delete | | Company Admin<br>Project Manager Assginee | New | High | Pending | |
| | | | Approval | - Approved by Company Admin/Project Manager | Company Admin<br>Project Manager | Existing | | Completed | |
| | | | View | - As it is to Taskly<br>- Attachments (New) | Company Admin<br>Management<br>Project Manager Assginee | New | | Pending | |
| | | | Filtering | - By Project (New)<br>- By Project Status (e.g. Ongoing, Completed) (New)<br>- By Project Manager (New)<br>- Data Range (New) | Company Admin<br>Management<br>Project Manager Assginee | New | High | Pending | |
| | | | | | | | | | |
| 17 | Lead Management | All Leads | View/Edit Lead Details | - Name<br>- Mobile Number<br>- Requirements<br>- Status<br>- Assigned To<br>- Added Date | | Planned | High | To Do | |
| | | | Change Status | - New<br>- Contacted<br>- Follow-up<br>- Converted<br>- Not Interested | | Planned | High | To Do | |
| | | | Send Email or SMS | | | Planned | High | To Do | |
| | | | Delete Lead | | | Planned | High | To Do | |
| | | | Filtering & Search | Column-wise | | Planned | High | To Do | |
| | | | Convert Lead to Project | Once clicked, user will be redirect to project add page and system will featch the relevant data. User will can edit/add information as per requirement | | Planned | High | To Do | |

| SL | MODULES | SUB MODULES | ACTIVITIES | ATTRIBUTES/ BUSINESS LOGIC | PERFORMED BY ROLE | FEATURE TYPE | PRIORITY | STATUS | QA STATUS |
|---|---|---|---|---|---|---|---|---|---|
| | | Add Lead | Add Lead (Manual) | - Name<br>- Mobile Number<br>- Email<br>- Assign To<br>- Date<br>- Source<br>- Status<br>- Requirements<br>- Next Follow Up<br>- Note<br>- Attachements | | Planned | High | To Do | |
| | | | Add Lead (Upload via CSV) | - User can upload with CSV file.<br>- The template will be system generated and the user must follow the structure to use bulk upload | | Planned | High | To Do | |
| | | | Duplicate detection logic | - Skip<br>- Overwrite<br>- Notify User | | Planned | High | To Do | |
| | | | Bulk Assign | Select multiple leads to assign a person | | Planned | High | To Do | |
| | | Form Builder (Reusable Per Project) | Build lead intake forms per project | e.g. Facebook Ads Form, Seminar Registration | | Planned | High | To Do | |
| | | | Shareable links or embeddable | | | Planned | High | To Do | |
| | | | Customizable Fields | User can add their own custom field to their "add lead" form<br><br>Example: Name, Phone, Email, Interested Course, Source, Notes | | Planned | High | To Do | |
| | | | Responses auto-saved to project lead DB | | | Planned | High | To Do | |
| | | Executive/Salesperson Panel (Per Project) | View Leads | Assigned by admin | | Planned | High | To Do | |
| | | | Filter by Status | - New<br>- Contacted<br>- Follow-up<br>- Converted<br>- Not Interested | | Planned | High | To Do | |
| | | | Bulk Update Status | | | Planned | High | To Do | |
| | | | Conversion Rate & Performance Stats | | | Planned | High | To Do | |
| | | | View follow-ups | - Today<br>- Missed (Yesterday)<br>- Upcoming (Tomorrow) | | Planned | High | To Do | |
| | | | Set Reminders for follow up | - Auto-reminders for due follow-ups<br>- Set reminder via email/in-app | | Planned | High | To Do | |
| | | Lead Status | User can as Lead Status as per their need | | Company Admin | Planned | | To Do | |
| | | Dashboard (Project-Level) | View Lead Stats | - Total leads<br>- Total New<br>- Total Contacted<br>- Total Follow-up<br>- Total Converted<br>- Total Not Interested<br>- Conversion Rate | | Planned | High | To Do | |
| | | | Filtering | - By Person<br>- By Source<br>- By Date Range | | Planned | High | To Do | |

| SL | MODULES | SUB MODULES | ACTIVITIES | ATTRIBUTES/ BUSINESS LOGIC | PERFORMED BY ROLE | FEATURE TYPE | PRIORITY | STATUS | QA STATUS |
|---|---|---|---|---|---|---|---|---|---|
| | | | Export Leads | - By Person<br>- By Status | | Planned | High | To Do | |
| | | | | | | | | | |
| 18 | Support Management | Create Support Tickets (Future Client Portal Compatible) | Tickets are always tied to a project<br>Sources<br>Sender Information<br>Tracking ID, QR Code in the URL<br>"Ticket fields:<br>- Subject, Message, Priority<br>- Attachments<br>- Assigned Agent" | | | Planned | Medium | To Do | |
| | | Custom Support Statuses per Project | Example: New → In Progress → Resolved | | | Planned | Medium | To Do | |
| | | | Admin can define statuses when creating the project | | | Planned | Medium | To Do | |
| | | Assignment and Team Comments | Assign tickets to support agents | | | Planned | Medium | To Do | |
| | | | internal comments | | | Planned | Medium | To Do | |
| | | | File attachments | | | Planned | Medium | To Do | |
| | | Notification Alerts | New ticket | | | Planned | Medium | To Do | |
| | | | Re-assignment | | | Planned | Medium | To Do | |
| | | | Status change<br>Email<br>Call Option | | | Planned | Medium | To Do | |
| | | | New comment | | | Planned | Medium | To Do | |
| | | Ticket Filters | Filter by:<br>- Status<br>- Agent<br>- Date<br>- Proirity | | | Planned | Medium | To Do | |
| | | Ticket History Logs | Tracks all actions<br>- Status change<br>- Assignments<br>- Comments | | | Planned | Medium | To Do | |
| | | Form Builder (Reusable Per Project) | Build lead intake forms per project | | | Planned | Medium | To Do | |
| | | | Shareable links or embeddable | | | Planned | Medium | To Do | |
| | | | Customizable Fields | User can add their own custom field to their "add tickets" form<br><br>Example: Name, Phone, Email | | Planned | Medium | To Do | |
| | | Search Tickets | | | | Planned | Medium | To Do | |
| | | View Support Tickets | Life cycle of a specific ticket | | | Planned | Medium | To Do | |
| | | Email Integration/Synchronization | Auto create tickets from client email<br>Auto sychnonization supports from email<br>Ticket creats and email with an automated ticket id | | | Planned | Medium | To Do | |
| | | | | | | | | | |
| 19 | Chat & Communication | Team Chat | Create Channels | - Channel Name & Description<br>- Type (Public, Private)<br>- Members (Select team members)<br>- Linked Project (Optional) | | Planned | Low | To Do | |

| SL | MODULES | SUB MODULES | ACTIVITIES | ATTRIBUTES/ BUSINESS LOGIC | PERFORMED BY ROLE | FEATURE TYPE | PRIORITY | STATUS | QA STATUS |
|---|---|---|---|---|---|---|---|---|---|
| | | | Direct Messages | One-on-one chats between team members. | | Planned | Low | To Do | |
| | | | Send Messages | - Text with formatting<br>- File attachments<br>- Emoji reactions<br>- @mentions for notifications | | Planned | Low | To Do | |
| | | Project-Specific Chat | Auto-create Project Channels | Each project automatically gets a dedicated chat channel. | | Planned | | To Do | |
| | | | Invite Client Guests | Temporarily add client contacts to project channels. | | Planned | | To Do | |
| | | | Pin Important Messages | Pin deadlines, decisions, or links. | | Planned | | To Do | |
| | | Meetings | Meetings Create/Edit/Delete | - Zoom Meetings Create<br>- Google Meetings Create (New) | SmartFlow Admin<br>Company Admin<br>Project Manager | New | Low | Pending | |
| | | | | | | | | | |
| 20 | Dashboard | Assignee | Summary | Top Blocks:<br>- Total Assigned Projects (New)<br>- Active Projects<br>- Total Task<br>- Total Ongoing Task<br><br>- Expense Approval<br>- Total Projects Vs Completed Projects Vs Pending Projects (Pie Chart) (New)<br>- Total Task Vs Completed Task Vs Pending Task (Pie Chart) (New)<br>- Filter in Pie Chart by Project (New)<br>- This Week Task (Calender as in SmartFlow) (New)<br>- Meeting Summary (New)<br>- Quick Actions (As per Taskly but design will be modern)<br>- Bug Tracking (All Status Count)<br>- Project Status Overview (As per Taskly but design will be modern)<br>- Recent Activities (As it is) | Assginee | New | Medium | In Progress | |
| | | Project Manager | Summary | Top Blocks:<br>- Total Assigned Projects (New)<br>- Active Projects<br>- Expense Approval<br>- Total Ongoing Task (All Assignee under the PM)<br><br>- Budget Overview (As it is)<br>- Total Projects Vs Completed Projects Vs Pending Projects (Pie Chart) (New)<br>- Total Task Vs Completed Task Vs Pending Task (Pie Chart) (New)<br>- Filter in Pie Chart by Project (New)<br>- This Week Task (Calender as in SmartFlow) (All Assignee under the PM)(New)<br>- Meeting Summary (New)<br>- Quick Actions (As per Taskly but design will be modern)<br>- Bug Tracking (All Status Count)<br>- Project Status Overview (As per Taskly but design will be modern)<br>- Recent Activities (As it is) | Project Manager | New | Medium | In Progress | |

| SL | MODULES | SUB MODULES | ACTIVITIES | ATTRIBUTES/ BUSINESS LOGIC | PERFORMED BY ROLE | FEATURE TYPE | PRIORITY | STATUS | QA STATUS |
|---|---|---|---|---|---|---|---|---|---|
| | | | Team Performance | - Team workload distribution (e.g. Person Name, Total Ongoing Project, Total Ongoing Task, Total Required Time) | Project Manager | Planned | Medium | To Do | |
| | | Management | Performance Metrics | | Management | Existing | Medium | To Do | |
| | | | Resource Statistics | -Task Completion Rate<br>-Individual Performance<br>-Filter option | Management | Existing | Medium | To Do | |
| | | | Workload Stats | How Many Resource in available | Management | Existing | Medium | To Do | |
| | | | Project Insights | | Management | Existing | Medium | To Do | |
| | | | Financial Overview | - Revenue vs. targets<br>- Profit margins by project | Management | New | Medium | To Do | |
| | | | Sales & Pipeline | - Lead conversion rates<br>- Project delivery timelines<br>- Sales pipeline value<br>- New vs. returning clients | Management | New | Medium | To Do | |
| | | | Strategic Metrics | - Client retention rates<br>- Project success rates<br>- ROI on projects | Management | New | Medium | To Do | |
| | | Admin | Summary | Top Blocks:<br>- Total Users<br>- Total Completed Project (New)<br>- Active Projects<br>- Expense Approval<br><br>- Subscription Summary (e.g. Plan Name, Plan Type (Monthly, Yearly), Remaining Days)<br>- Budget Overview (As it is)<br>- Expense Overview (New)<br>- Total Projects Vs Completed Projects Vs Pending Projects (Pie Chart) (New)<br>- Meeting Summary (New)<br>- Quick Actions (As per Taskly but design will be modern)<br>- Project Status Overview (As per Taskly but design will be modern)<br>- Recent Activities (As it is) | Company Admin | New | Medium | Pending | |
| | | Clients | Summary | Top Blocks:<br>- Total Users (All Project Member)<br>- Total Task (All Project Member)<br>- Total Ongoing Task (All Project Member)<br>- Total Bugs (Submitted by Client)<br><br>- Meeting Summary (New)<br>- Bug Tracking (All Status Count)<br>- Quick Actions (As per Taskly but design will be modern)<br>- Task Status Overview (As per Taskly but design will be modern)<br>- Recent Activities (As it is) | Clients | | | | |

| SL | MODULES | SUB MODULES | ACTIVITIES | ATTRIBUTES/ BUSINESS LOGIC | PERFORMED BY ROLE | FEATURE TYPE | PRIORITY | STATUS | QA STATUS |
|---|---|---|---|---|---|---|---|---|---|
| | | SmartFlow Admin | Summary | Top Blocks:<br>- Total Companies<br>- Total Plans<br>- Total Orders<br>- Total Revenue<br><br><br>- Plan Request<br>- Coupons<br>- Plan Summary (Free/Premium) (New)<br><br>- Meeting Summary (New)<br>- System Overview (As per Taskly but design will be modern)<br>- Recent Activities (As it is) | SmartFlow Admin | New | Medium | Pending | |
| | | | Business Performance | - MRR/ARR tracking (Monthly Recurring Revenue (MRR) and Annual Recurring Revenue (ARR))<br>- Customer acquisition & churn rates (Customer acquisition is the process of gaining new customers, while the churn rate is the percentage of existing customers who stop using a product or service during a specific period)<br>- Lifetime Value (LTV) (the total revenue a business can expect from a single customer throughout their entire relationship)<br>- Customer growth metrics | SmartFlow Admin | Planned | Low | To Do | |
| | | | Customer Success | - Active customers overview<br>- Plan distribution analytics<br>- Customer support ticket volume | SmartFlow Admin | Planned | Low | To Do | |
| | | | Product Analytics | - User engagement metrics<br>- Module usage statistics<br>- Performance bottlenecks | SmartFlow Admin | Planned | Low | To Do | |
| | | | Platform Health | - System uptime & performance<br>- Server resource monitoring<br>- API health status<br>- Security monitoring | SmartFlow Admin | Planned | Low | To Do | |
| | | | Financial Operations | - Revenue analytics<br>- Payment success/failure rates<br>- Tax and compliance reporting | SmartFlow Admin | Planned | Low | To Do | |
| | | | | | | | | | |
| 21 | UYSYS LLM (ai based MCP model ) | Product wise task creation | - User have just provide project details prompt all task shoulb be created automatically | | SmartFlow Admin | New | High | Pending | |
| | | | Voice to Text | | SmartFlow Admin | New | High | Pending | |
| | | Api response covert to Task | API Implement | | SmartFlow Admin | New | High | Pending | |
| | | | Show API responce, give user review | | SmartFlow Admin | New | High | Pending | |
| | | | Respose to task covert | | SmartFlow Admin | New | High | Pending | |
| | | Meeting Minutes Bot | Create meeting minutes from the meeting | | SmartFlow Admin | New | High | Pending | |
| | | | | | | | | | |
| 22 | Profile | My Profile | As it is in SmartFlow | - As it is in SmartFlow<br>- Whatsapp Number (New)<br>- Current Password (New) | Everyone | New | High | Pending | |