Business Management System

User Manual for Muqaddas Saeed

Welcome to Meeting Matters Business Management System

This manual will guide you through using the Business Management System as a Customer Relationship Manager at Meeting Matters Clinic.

Login Credentials

IMPORTANT: Keep these credentials secure and do not share them with anyone

Username: Muqaddas_1049

Employee ID: EMP410420 (Alternative login method)

Password: password123

Position: Customer Relationship Manager

Department: Customer Relations

First Time Login Process

1. Navigate to the login page

2. Choose your login method:

   - Option A: Enter your Username (Muqaddas_1049) and Password

   - Option B: Enter your Employee ID (EMP410420) and Password

3. Click "Sign In"

4. Complete Contract Signing (First time only):

   - A contract signing modal will appear automatically

   - Review your employment contract carefully

   - Provide your digital signature to complete the process

   - Once signed, you will gain full access to the system

System Overview

The Business Management System helps you manage your daily work activities, including:

• Task Management: View and complete assigned tasks

• Project Collaboration: Work with team members on projects

• Document Management: Access and upload important documents

• Communications: Stay updated with announcements and notifications

• Profile Management: Keep your personal information up to date

Dashboard Navigation

Main Menu (Left Sidebar)

• Dashboard: Your main workspace and overview

• Tasks: View and manage your assigned tasks

• Projects: Access projects you are involved in

• Documents: Upload and access important files

• Profile: Update your personal information

• Announcements: Read company updates and news

Top Navigation Bar

• Notifications: Bell icon showing new alerts

• User Menu: Your profile and logout option

Task Management

Viewing Your Tasks

1. Click "Tasks" in the left sidebar

2. You will see a list of tasks assigned to you

3. Each task shows:

   - Task title and description

   - Due date and priority level

   - Current status (Pending, In Progress, Completed)

   - Project association (if applicable)

Working with Tasks

1. To start a task: Click on the task and change status to "In Progress"

2. To complete a task: Mark it as "Completed" when finished

3. To add comments: Use the comment section to communicate with your team

4. To view details: Click on any task to see full information

Task Priorities

• High: Red indicator - Complete immediately

• Medium: Yellow indicator - Complete within deadline

• Low: Green indicator - Complete when time allows

Project Management

Accessing Projects

1. Click "Projects" in the left sidebar

2. View all projects you are assigned to

3. Click on any project to see:

   - Project description and goals

   - Team members involved

   - Related tasks and deadlines

   - Project timeline and progress

Your Role in Projects

As a Customer Relationship Manager, you may be involved in:

• Customer service improvement projects

• Client communication initiatives

• Customer satisfaction surveys

• Relationship building campaigns

Document Management

Uploading Documents

1. Go to "Documents" section

2. Click "Upload Document"

3. Select your file and add a description

4. Choose the appropriate category

5. Click "Upload" to save

Document Types You May Need

• Customer feedback reports

• Communication templates

• Training certificates

• Meeting notes

• Project documentation

Accessing Documents

• All your uploaded documents appear in the Documents section

• Use search to find specific files quickly

• Download documents by clicking on them

Profile Management

Updating Your Information

1. Click "Profile" in the left sidebar
2. Update your information as needed:
   - Contact details (phone, address)
   - Emergency contact information
   - Professional skills and qualifications
   - Profile photo
3. Click "Save Changes" when done

Important Profile Sections

• Personal Information: Keep contact details current

• Professional Details: Update skills and experience

• Emergency Contact: Ensure this information is accurate

• Banking Information: Required for salary processing

Notifications and Communication

Checking Notifications

1. Click the bell icon in the top navigation

2. View recent notifications including:

   - New task assignments

   - Project updates

   - System announcements

   - Deadline reminders

Reading Announcements

1. Go to "Announcements" section

2. Read company-wide updates

3. Important announcements are highlighted

4. Mark as read when reviewed

Your Role as Customer Relationship Manager

Daily Responsibilities

• Customer Communication: Respond to customer inquiries promptly

• Relationship Building: Maintain positive relationships with clients

• Issue Resolution: Address customer concerns and complaints

• Documentation: Record customer interactions and feedback

• Reporting: Complete assigned reports and surveys

Key Performance Areas

• Customer Satisfaction: Ensure clients are happy with services

• Response Time: Reply to customers within set timeframes

• Communication Quality: Maintain professional and helpful interactions

• Problem Solving: Resolve issues effectively and efficiently

Troubleshooting Common Issues

Login Problems

• Forgot Password: Contact your HR administrator for password reset

• Account Locked: Contact IT support if multiple login attempts fail

• Browser Issues: Try clearing browser cache or using a different browser

Contract Signing Issues

• Modal Not Appearing: Refresh the page and try again

• Signature Not Saving: Ensure you have a stable internet connection

• Contract Questions: Contact HR Manager Shahzad Ahmad for clarification

System Access Issues

• Limited Access: Make sure you have completed contract signing

• Missing Features: Verify your role permissions with HR

• Page Loading Slowly: Check your internet connection

Support and Contacts

For Technical Issues

• Contact your IT support team

• Report system bugs or glitches immediately

For HR Related Questions

• HR Manager: Shahzad Ahmad

• Email: hr@themeetingmatters.com

• Contact for: Employment questions, policy clarifications, benefits information

For Work-Related Support

• Supervisor: Your direct manager

• Team Lead: Contact for project guidance and task clarification

Security and Best Practices

Password Security

• Never share your login credentials

• Use a strong, unique password

• Log out when leaving your workstation

• Report any suspicious activity immediately

Data Protection

• Keep customer information confidential

• Only access information necessary for your role

• Follow company data protection policies

• Secure physical and digital documents

Professional Conduct

• Maintain professional communication at all times

• Respect confidentiality of company and customer information

• Follow company policies and procedures

• Report any concerns to your supervisor

Quick Reference

Essential Daily Actions

1. Log in to the system every morning

2. Check notifications for new updates

3. Review assigned tasks and prioritize your work

4. Update task status as you progress

5. Upload any required documents

6. Check announcements for company updates

7. Log out securely when finished

Important Reminders

' Complete contract signing on first login

' Keep your profile information updated

' Respond to tasks within deadlines

' Maintain professional communication

' Secure your login credentials

Employment Details Summary

• Position: Customer Relationship Manager

• Department: Customer Relations

• Salary: PKR 60,000 per month

• Working Hours: Monday-Friday, 9:00 AM - 6:00 PM

• Start Date: August 19, 2025

• Probation Period: 3 months

• Benefits: Health insurance, annual leave (15 days), sick leave (10 days), professional development

Welcome to the team, Muqaddas! We look forward to working with you.

For any questions about this manual or the system, please contact your supervisor or HR department.

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Meeting Matters Clinic - Business Management System