Fil d’actualité :

Calendrier : this module shows the main events that is happing in the company also the financial aspects and venets in the organization.

calendar

this module is basicly will show the organization activities

The Main Content module contains 2 parts:
 * the finance:

4 check box in order to filter the the financial events.

Cheque sortants

Cheque entrans

Traites sortants

Traites entrans

* vente :

Devis (service date)

Service date

Module : Groupe de Travail

Objectif :
 Les groupes de travail permettent aux membres de l’équipe de collaborer sur des projets partagés en échangeant des idées, des documents, et en suivant l’avancement des tâches — le tout au même endroit.

Ajouter un nouveau groupe de travail

Lorsque vous cliquez sur « Ajouter » :

Une fenêtre popup apparaît avec les champs suivants :

Champ	Description
Nom	Zone de texte pour saisir le nom du groupe que vous souhaitez créer.
Objectif de groupe	Le but ou l'objectif du groupe de travail.
Statut	Liste déroulante avec deux options : - *En opération* (Actif) - *Fermé* (Inactif)
Icône du groupe	Cliquer dessus affiche une sélection d'icônes pour représenter visuellement le groupe.
Public (Case à cocher)	Si cochée, cela signifie : 1. Le groupe est visible par tous les utilisateurs de l'entreprise. 2. Tous les utilisateurs peuvent demander à rejoindre le groupe. 3. Seuls les membres du groupe peuvent voir son contenu.

Ajouter des membres au groupe

Cliquez sur « + » pour ajouter des membres.

Une fenêtre popup apparaît avec :

Champ	Description
Sélecteur de membres	Liste déroulante affichant tous les membres de l'entreprise.
Statut du membre	Liste déroulante pour sélectionner le rôle/statut du membre (ex. : Propriétaire, Membre).
Description du rôle	Zone de texte pour préciser le rôle ou les responsabilités du membre ajouté.

Taches

This module is about managing the tasks to be implimeanted to organize the operational tasks and to improve the efficiency of the collaborateur based on the priority.

The page structure contains 2 sections:

The first section contains the connsodiation of the informations of the tasks based on the priorities (Priorité TRÉS HAUTe , Priorité HAUTE , Tâches (a faire) , Tâches (bloque .

The Second section contains : this part is where you should input the informations to create tasks.

- The drop box: in which you can filter the member you want to know information about.
- Action bar that contains 4 for options:

  + liste (table that you add new taks or delete a task

  + Kanban where it can add new taks or delete a task with kanaban visualization of 4 workflow (a faire, enc ours , bloque , termine)

- Maps is the placement of the tasks are located to
- Calender is when the tasks segment timed

To add a task:

You click on the button ajoute:

This where you want to add the infos about the task you want to create.

The left side contains:

Titre : the name of the task

Description : the disciption of the task

Date picker : (Date de début planifiée ,Date de fin planifiée , Date de début , ,Date de fin) this is where you can choose the timing of the task

in oreder to not forget the task. cheking the box of (RappeL) in which you can choose the time of the rappel

The right side :

Type : drop box that contains the type of assign task(to do , appel telephoniqe , envois d'email , rendez vous , visite technique)

Priorite : drop box based on the priorte of the task (tres huate moyenne , basse tres basse)

Responsible : the person to be assigned for the task

Contact : is the person you want to be affiliated to the task (exp the client …) , on cliquing the + you can add client if he is not the company base,

The text box of Latitude and Longitude IS WHERE YOU CAN PLACE THE TASK.(or you can simply clique the button ma position as it wll automaticly enter the data)

After that you can clique on save.

Contacts module

In this module : this where you can add contacts to you erp system and their infos. And consulting their information if they were added.

There 2 possible way to add your client to the system.

By adding the excel file that contains :

Information Entreprise :

Référence

Raison Social

MATRICULE FISCALE/SIRET

TELEPHONE

MOBILE

ADRESSE

Email

CODE DOUANE/CODE NAF

RIB

Information Particulier / Responsable d'entreprise :

Réference

Sexe

Nom Résponsable

Prénom Résponsable

Email

Tel1

Tel2

Rib

Adresse

Or by clinquing on the button [+ Ajouter]

It will show you a pop up with the title of contact:

The left side

+Type of the contact (either entreprise or personne physique (you can chose one of them by checking the button of each one)

+ Etat which is a drop box that contains the status of the client (nouveau , client , prospect , fournisseur , partenaire , condidat, liste noire)

INFORMATION GÉNÉRALE

In this part is where in general infos about the company.

Raison sociale

Email

N° de téléphone 1

N° de téléphone 2

Site web

Type d'organisation

Industrie

Nombre d'employés

INFORMATIONS DE FACTURATION ET LIVRAISON

Matricule Fiscale/SIRET

Code Douane/Code NAF

RIB

Information par categorie de contact

Catégorie

On the right side

Groupe de travail :

Veuillez choisir un groupe de travail pour partager votre contact avec les responsables de ce groupe.

By chosing from the drop box

ADRESSE :

The adresse of the client

Code postal

Ville

Pays (by chosing from drop box)

Latitude and longitude

And then by cliquing on Save

After adding to contact:

You can view the contacts by cliquing on the liste of buttons [liste , carte , maps]

Liste will show you: a table that contain the following informations

[Prénom & Nom , telephone , derniere interations , derniere tache , partage & affectation]

In the right side of the table it will show some of icons :

- this is where you can find all the detaited info of the contact (from dashboard : that consolidate the what the client have interaction with the organization , finance ; this is where all the financial
- this is where it to do some medifications of contact informations (after finish modifiying of the click on the button enrigstrer)
- this to delete the contact
- this to add actions in other modules:
- to create a task (pop up)
- to create a devis(pop up of devis)
- to create a facture (pop of facture)

it will show up a popup to input some information to associate with other company

Module vente

In this module it contains 6 features : devis , bonds de commande , bons de livraison, factues , avoirs vente , tableau de board.

Devis : in this feature is to create a devis vente in order

When cliquing on ajouter a pop up will show, where you can add the info for devis

Choisir client : a drop box that will show the list of the client.

Also you can add a client by cliquing on the + sign

Nom responsible : a text box in which you should enter the responsible of the company who is taking charge of the business

Address : text box that contains the address of the client.

You can add the date that devis time.

A drop box in which it contains the currency of the devis.

A drop box that contains the employees of your organization.

Check the part adding new infos

Bon de commande : in this module is where you can add new bon de commande to the client where you input the data.

Bon de commande client : Text box where you can insert Bon de commande

Client / prospect : a drop box where you can find all the client that have been inserted in the erp database, you can click on + where it will show a pop up where you add the data to the new client.

Responsible client : in this text box is where you can add who is responsible for bon de commande .

Adresse client : text box where you can input the address of the client.

Date de reception de commande : a text box where you can choose the date of the command

Devise : text box where you can choose the currency of the bon de commande. With this module you can understand your customer history and past interaction in which you can make a better decision and indentify your leads and improve your business.

There are 6 features in this module.

Prospect : this fetures is where you can create a potential client and affected to a certain business devoloper.

So in the of this feature . you can find :
 * 3 bottons(liste (where the data it will show the data of the current prospects as a table that contains the following columns (Prénom & Nom / telephone / derniere interaction / derniere tache) , carte (it will show a box that contains the detailed info of the contact or prospect) , maps (this will show the clients repartition and where they are located in the map)

*a botton called ajouter : this will show a pop up where you can create a contact.

The feature Opportunites :

In this page it contains a small dash where it contains the general infos of the opportunities that your organization have:

*The total Opportunités

*En cours Opportunités **that are holding**

* REMPORTÉES : the opportunites that they won

* Perdus : the opportunities that have been lost

On the right side it contains the callender if there are incoming opportunities.

container that you can search by refrences.

4 bottons (list which show table that coantins the columns (Date de creation , Référence , Dernier Intéraction , Contact , Partage & Affectation) , kanban(which contains kanban board with the following titles (nouvelle , en cours , remportees and perdus) , maps (this is where you can find the opportunities in the map) , calender (where the current opporunties are scheduled))

The botton (ajouter) : this will show a popup to create the opportunite to input the data.
Contact

Calender feature is where you can see all the action that have been inserted in the CRM modules.

Events :

In this module is where you can add and consult the event that

A search box in order to search the name of the event you are looking for.

A button called ajouter : this will show a pop up of event where you can add the event you want to add in you CRM .

Text box that contain the title of the event to be added.

Type it contains a drop box that contains the type of the event (foire , facebbok ads , mailing , linkedin_ads , google ads)

Budget TTC (TND) : text box that contains the budget to be impleament widhin the event.

Tableau de board : in this feature this will show the general informations of the module of the CRM

The dashboard contains 4 filters, these fiters are based on 4 dropbox :

> The first drop box : source de prospection (data source where the contact have been prspected)
>
> The Second drop box