• COMMON CRM WORKFLOW

1. Dashboard

The **Dashboard** acts as the control centre of the CRM system. It gives top-level visibility to the organization.

Key Functions:

- **Real-time KPIs:** Key performance indicators are updated live. For example, sales targets vs achievements, employee attendance trends, etc.
- **Inventory Alerts:** Notifies about low stock, expiry, or overstocked items.
- **HAIHQ (High Alert & Important HQ Notices):** Broadcasts urgent updates or critical instructions.
- **Quick Links:** Shortcut access to frequently used modules like Sales Orders, Purchase Requests, and Attendance Logs.

2. Purchase Management

Handles the **complete purchase lifecycle** from requirement to payment.

Internal Workflow:

- **PQ (Purchase Quotation):** Vendor sends quotations based on purchase requests.
- **GPN (Goods Purchase Note):** Once goods arrive, their entry is logged here.
- **Purchase Invoice:** Created after receiving goods; verified against the PO and GPN.
- **Vendor Payment:** Initiated post-verification of invoice and stock delivery.

🔁 **Linked with:**

- Inventory (for stock updates)
- Accounts (for payments)
- Dashboard (to reflect purchase KPIs)

3. Inventory & Stock Management

Monitors and controls the **movement and value of stock.**

Internal Workflow:

- **Product Master:** Contains details like SKU, category, pricing.
- **Stock Movement:** Tracks inwards (purchase) and outwards (sales/returns).
- **Warehouses:** Manages stock locations.
- **Transfers:** Movement of stock between warehouses.
- **Batches/Expiry:** Tracks batch numbers and expiry dates.
- **Reorder Levels:** Alerts when stock falls below minimum level.
- **Valuation:** Calculates stock value based on FIFO/LIFO/Weighted Avg.

🔁 **Linked with:**

- Purchase (for goods in)
- Sales (for goods out)
- Accounts (for stock valuation)

4. HR Management

Manages **employee data and lifecycle events.**

Internal Workflow:

- **Employee Master:** Central employee database with ID, role, contact, salary, etc.
- **Departments/Roles:** Organizes employees into structured hierarchies.
- **Onboarding/Exit:** Automates joining formalities and exit procedures.
- **Document Vault:** Stores resumes, ID proofs, contracts digitally.
- **Transfers/Promotions:** Logs any internal movement or upgrades.
- **Self-Service:** Lets employees access pay slips, apply for leaves, update details.

🔁 **Linked with:**

- Payroll (for salary)
- Attendance (for presence tracking)

5. Attendance & Leave

Tracks **daily presence and leave types** for employees.

Internal Workflow:

- **Attendance Sources:** Integration with biometric or manual inputs.
- **Shift Management:** Assigns shift timings to employees.
- **Late/Early Alerts:** Detects irregular punch-in/punch-out timings.
- **Leave Management:** Employees apply, managers approve/reject.
- **Holiday Calendar:** Lists company-declared holidays.

🔁 **Linked with:**

- Payroll (for accurate salary calculation)
- HR (for employee records)

6. Accounts & Finance

Manages all **financial transactions and reports.**

Internal Workflow:

- **Chart of Accounts:** Defines all GL accounts.
- **GL Entries:** Automated and manual accounting entries.
- **Cash/Bank Books:** Track deposits, withdrawals, transfers.
- **Receivables/Payables:** Tracks dues from customers and vendors.
- **PSL & Balance Sheet:** Full financial reports generated automatically.
- **Tax Reports:** GST/VAT/TDS reports are generated here.

🔁 **Linked with:**

- Purchase (vendor payments)
- Sales (customer receipts)
- Payroll (salary disbursement)

7. Payroll

Manages **salary, incentives, and compliance.**

Internal Workflow:

- **Salary Setup:** Based on role, level, and department.
- **Auto Calculations:** Calculates based on attendance, leave, deductions.
- **Loan/Advance:** Records and deducts monthly EMI from salary.
- **Bonus/Incentives:** Based on performance or festival triggers.
- **Pay Slip Generator:** Creates monthly downloadable pay slips.
- **Statutory Compliance:** Calculates PF, ESI, tax, and submits reports.

🔁 **Linked with:**

- HR (employee data)
- Attendance (working days)
- Finance (salary payouts)

8. CRM Core / Customer Management

Manages **customer interactions, service, and feedback.**

Internal Workflow:

- **Customer Master:** Stores customer profile, contact, address.
- **Follow-ups:** Schedule follow-up calls/emails/tasks.
- **Communication Log:** History of emails, calls, chats.
- **Tickets:** Track issues or complaints raised by customers.
- **Contracts:** Stores SLA agreements, expiry dates, renewal dates.

🔁 **Linked with:**

- Sales (customer orders)
- Notifications (auto-reminders for follow-ups)

9. Sales Management

Handles the **end-to-end sales pipeline.**

Internal Workflow:

- **Opportunities:** Leads or deals in the pipeline.
- **Quotation:** Price estimates sent to prospects.
- **Sales Orders:** Confirmed orders.
- **Delivery Notes:** Proof of shipment.
- **Invoicing:** Final bill for customer.
- **Customer Ledger:** Tracks what each customer owes or paid.

🔁 **Linked with:**

- Inventory (to check stock before delivery)
- CRM (customer relationship tracking)
- Accounts (invoicing and collections)

10. Reports & Analytics

Generates **actionable insights** to support decision-making.

Internal Workflow:

- **Sales Reports:** Product-wise, region-wise performance.
- **Purchase Reports:** Vendor-wise spending, pricing trends.
- **Inventory Control:** Stock-in-hand, slow-moving items.
- **Audit Trail:** Tracks who changed what and when.

🔁 **Linked with:**

- Every module feed data here.

11. Notifications & Alerts

Sends **automated updates** via multiple channels.

Internal Workflow:

- **Reminders:** For follow-ups, payments, tasks.
- **Email/SMS/WhatsApp Alerts:** Auto-notify employees or customers.
- **Approvals:** Triggers when a manager’s consent is needed.

🔁 **Linked with:**

- Sales, HR, CRM, Purchase, Attendance

2. RESTARUNT CRM WORKFLOW

1. Restaurant Setup

Inside Actions:

- When a restaurant is registered, details like name, GSTIN, contact, and logo are saved in the main configuration table.
- Roles (Admin, Chef, etc.) are created and stored with permissions in a roles and permissions table.
- Table layout is configured using coordinates or zones (e.g., 2D grid or sectioned by room).
- Tax slabs (e.g., 5%, 12%) and UOM (kg, Liter, piece) are set globally, used in menu and inventory.
- Kitchen printers are assigned to specific categories (e.g., Starters → Printer).

2. Menu Management

Inside Actions:

- Menu items are stored with attributes: name, description, variants (small/medium/large), price, tax slab, etc.
- Categories (Starters/Main/Beverages) are mapped via foreign key.
- Each item links to a recipe → recipe maps raw materials & quantity needed.
- Price variants stored in a nested or separate variant table.

3. Inventory / Stock Management

Inside Actions:

- Raw materials stored with fields: name, UOM, cost price, min stock alert, expiry date (optional).
- Stock managed per location (Main Store / Kitchen Store), stored in a store stock table.
- On sales, recipe triggers deduction of raw material quantities → recipe x item qty = deduction.
- System checks for minimum stock and raises alert if threshold breached.

4. Purchase Management

Inside Actions:

- Supplier info stored (GSTIN, address, credit period).
- PO creation includes item, quantity, expected date.
- When items arrive, GRN is generated (goods receipt note), marking items as received.
- PO status changes: *Created* → *Partially Received* → *Completed*.
- Payment status updated separately (linked to accounts payable).

5. Order & Billing (POS)

Inside Actions:

- Waiter selects table or walk-in, adds items to cart → linked to a temporary KOT ID.
- Each item added checks for stock via recipe.
- KOT generated for kitchen printer per category.
- Billing applies taxes, discounts (manual or coupon code verified from promo table).
- Payment processed (multi-mode allowed: part cash, part UPI).
- Final bill saved with items, tax, discounts, mode of payment, KOT ID, etc.
- Stock deduction executed after bill generation, not before.

6. CRM (Customer Management)

Inside Actions:

- Customer data saved on POS or from mobile app.
- Loyalty points calculated: bill amount × reward ratio (e.g., ₹100 = 5 points).
- Visit history: Date, time, table, amount, feedback (optional).
- CRM module allows SMS/email campaign using filters (birthdays, frequent diners).

7. Reservations & Table Management

Inside Actions:

- Table status tracked in real-time: Free → Reserved → Occupied → Cleared.
- Waiter assignment links staff ID with table ID.
- Reservation stored with customer ID, table ID, time slot.
- Expired reservations auto marked as No-Show after grace period.

8. Kitchen Management

Inside Actions:

- Kitchen screen fetches pending KOTs by category (e.g., Starters to Grill Section).
- Kitchen staff updates item status: *In Progress* → *Ready*.
- Once ready, waiter notified via terminal or handheld.
- Kitchen delay analytics possible (KOT time vs Ready time).

9. HR & Payroll

Inside Actions:

- Staff profile stored with photo, contact, salary, shift timings, and access role.
- Attendance via biometric or app login.
- Salary calculation = Base Salary + Overtime – Deductions.
- Slip includes gross, net, PF/ESI (if applicable).
- Shift-wise staff planning available.

10. Expense Management

Inside Actions:

- Expense types configured (Rent, Utilities, Repairs).
- Daily/weekly/monthly expenses added with voucher number, receipt photo (optional).
- Category-wise report shows % of income spent.
- Linked to accounting if integrated.

11. Reports & Analytics

Inside Actions:

- Sales data grouped by date, item, category, or table.
- Profit = Sales – Cost of raw materials – Expenses.
- Expiry alerts from stock records (based on purchase date + shelf life).
- CRM analytics uses frequency, recency, and value scoring.

12. Admin & Settings

Inside Actions:

- All master data managed here.
- Access roles have toggleable permissions (can view, can edit, can delete).

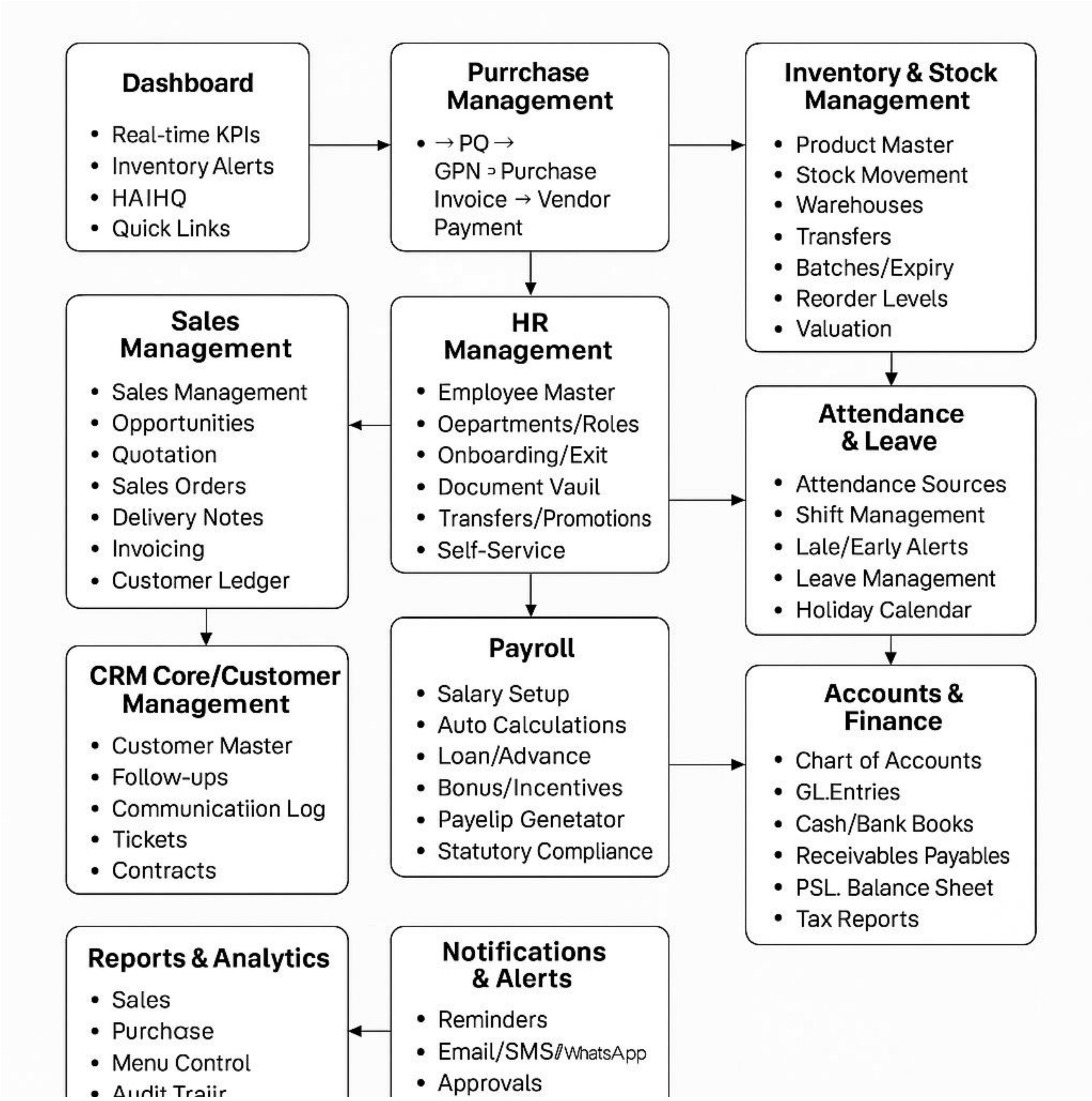
- Multi-branch mode uses branch code.
- Backup scheduled (daily/weekly) with cloud sync using AWS/GCP.

13. Mobile App / Tablet POS

Inside Actions:

- Menu synced via API.
- Orders placed from tablet → synced with backend POS and triggers KOT.
- Stock alerts, reports pushed as real-time notifications to owner/staff.
- Offline mode with local storage sync on internet reconnection.

➢ RESTARUNT CRM WORKFLOW IMAGE



CONSTRUCTION CRM WORKFLOW

1. HR & Payroll Module

Admin:

- Create HR Manager account
- Set global salary structures (CTC breakup, PF, ESI, etc.)
- Configure:
    - Attendance policies (late marks, grace time)
    - Leave policies (CL, SL, PL)
    - Holiday calendar
- **Access reports:**
    - Payroll Summary
    - Leave utilization
    - **Staff performance and attrition**

HR Manager:

- Add new employee (photo, role, joining date, shift)
- Edit employee details (salary revision, transfer, etc.)
- Track attendance via:
    - Biometric sync
    - Mobile login/logout
- Approve/reject leave
- Run monthly payroll:
    - Auto-fetch working days, overtime
    - Deductions based on absence/leaves
    - Generate salary slips (PDF)
- Send payslips via mail or employee portal

Employee:

- Login on mobile/web
- Mark attendance (geo-tagged if mobile)
- View leave balance
- Apply for leave
- Download monthly payslip

2. Site Management

Admin:

- Add project sites (name, location, client)
- Assign Project Manager to each site
- Define roles with permissions for each site

Project Manager:

- Create tasks with timeline and budget
- Assign work to Site Supervisors and Workers
- Upload daily status report:
  - Progress photos/videos
  - Comments and issues
- Update task status (Pending → Ongoing → Completed)
- Monitor:
  - Worker attendance
  - Daily productivity
- Raise alerts (e.g., delay, site hazard)

Site Supervisor:

- Daily attendance register of labourers
- Site log: weather, progress, problems

- Raise requests:
    - Resource requirement (tools, materials)
    - Report issues (e.g., theft, injury)

3. Indent & Inventory

Site Supervisor:

- Raise material indent (cement, rods, etc.)
    - Specify quantity, urgency, location
- Track request status (Pending → Approved → Issued)

Project Manager:

- Review indent (validate quantity vs. task)
- Approve or reject with remarks
- Mark priority level (Urgent, Normal, Low)

Procurement Officer:

- View all approved indents
- Check availability in central inventory
- Issue stock to site
    - Generate Material Gate Pass
- Update stock register
- Generate:
    - Low stock alerts
    - Material movement report

Admin:

- Define reorder levels
- Add/remove:
    - Warehouses
    - Vendors

    - Material master data

4. Purchase Management

Procurement Officer:

- Raise RFQ (Request for Quotation) to vendors
- Compare quotes, select vendor
- Generate Purchase Order (PO)
- On delivery:
    - Receive items
    - Generate Goods Receipt Note (GRN)
    - Conduct Quality Check
- Update inventory stock
- Maintain:
    - Purchase register
    - Vendor performance log

Accountant:

- Record vendor invoices
- Map PO → GRN → Invoice
- Schedule payments (based on credit terms)
- Maintain payment ledger

Admin:

- Maintain vendor master
- Approve POs above threshold (e.g., ₹50,000)
- Generate purchase summary reports

5. Sales Management

Admin:

- Add clients and site details
- Set invoice format (GST/Non-GST)
- Assign unique invoice series

Project Manager:

- Create work order (linked to project milestones)
- Notify completion for billing
  - Upload photos/documents as proof

Accountant:

- Create invoice
  - Auto-calculates tax (CGST, SGST, IGST)
- Send invoice to client via email
- Record payment received
- Track dues & generate outstanding report
- Generate:
  - GST summary
  - Client-wise billing

6. Expense Management

Site Supervisor:

- Submit petty cash expense:
  - Fuel, snacks, misc. expenses
  - Upload photo of bills
- Categorize expense type
- Send for approval

Project Manager:

- Review expense claims

- Approve or reject
- Set monthly budget limits

Accountant:

- Add larger expenses (rent, vehicle, bulk fuel)
- Allocate to correct site/project
- Handle payments via cash/UPI/cheque
- Generate:
    - Monthly expense report
    - Expense vs Budget comparison

Admin:

- Access overall:
    - Project-wise expenditure
    - Profit margin analysis

Dashboard & Reports Access

Role	Dashboard Widgets
Admin	HR stats, Project cost, Payroll, Inventory, Profit & Loss
HR Manager	Staff count, Leave/Attendance charts, Monthly payroll
Project Manager	Task progress bars, Indent status, Site expense
Procurement Officer	Low stock alerts, Purchase summary, Vendor stats
Accountant	Cash flow, Expense trends, Invoice due list

📱 Mobile App Views

Role	Mobile Capabilities
Site Supervisor	Mark attendance, Raise indent, Upload site photos, Site log

Role	Mobile Capabilities
Employees	Mark attendance, apply leave, Download payslip
Project Manager	Approve indent, View task progress, Monitor site updates
Admin/HR	View attendance status, Leave approvals, Announcements