

# Admin:-

## Leads

The screenshot shows the RISE CRM interface. The left sidebar is collapsed. The main content area is titled 'Leads' and shows a list of leads under the filter 'yash'. The 'Files' tab is active, displaying three attachments, each a screenshot of 429.94 KB uploaded on different dates (27/12/2025, 27/12/2025, 24/12/2025). The attachments have edit and delete icons in the 'Actions' column.

- When downloading the Excel file, a JSON file is being downloaded instead.

Leads → leads name → view → files→ download

The screenshot shows the RISE CRM interface with a modal dialog box centered over the page. The dialog box contains the text 'crm-update.netlify.app says' followed by 'Failed to download file'. Below the dialog, a developer tools Network tab is visible, showing a failed download request for 'download' with a status of 404. The request was initiated by 'index-BZZ-GaTl.js:69' and took 1.36 seconds. The Network tab also shows other resources loaded from the same URL.

- Failed to download file

# Clients

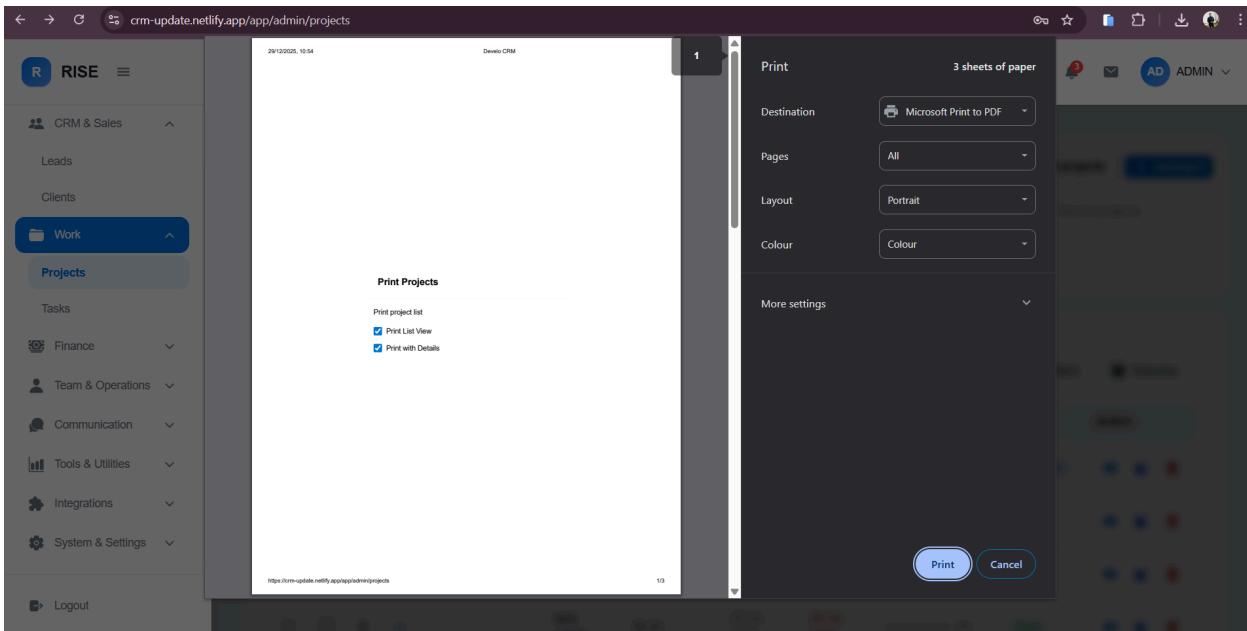
The screenshot shows the RISE CRM & Sales application interface. The left sidebar has a 'CRM & Sales' section selected, which contains a 'Clients' option. The main area displays a list of clients, with 'Client 1' selected. The client details page includes sections for Overview, Projects, Subscriptions, Invoices, Payments, and Statements. A sidebar on the right provides 'Client info' such as Client Name, Email, Address, Phone, and Site.

- When downloading the Excel file, a JSON file is being downloaded instead.

The screenshot shows the RISE CRM & Sales application interface. The left sidebar has a 'CRM & Sales' section selected, which contains a 'Clients' option. The main area displays a list of clients with a detailed view for 'Client 1'. The detailed view includes sections for Overview, Clients, Contacts, and a table of client data. The table columns include ID, Name, Email, Phone, Projects, Total invoiced, Payment Received, Due, and Actions. The 'Actions' column contains icons for edit, view, and delete.

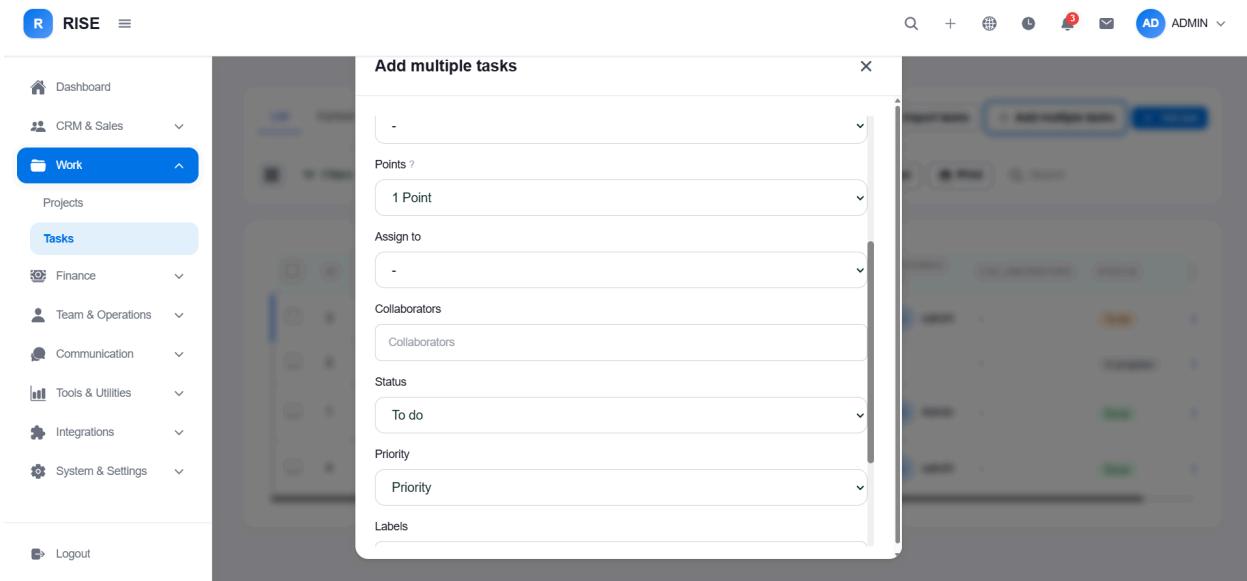
- When updating, the updated data is not showing, but when viewing, the updated data is visible.

## Work → Project

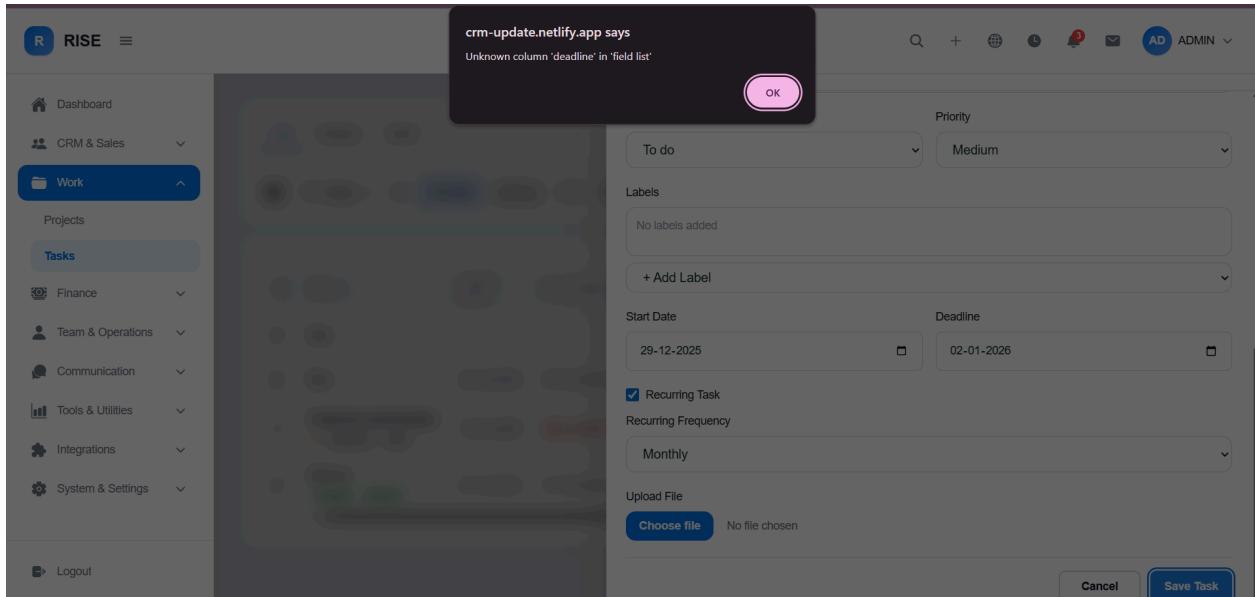


- When printing, the normal print works correctly, but the Excel sheet is not printing.

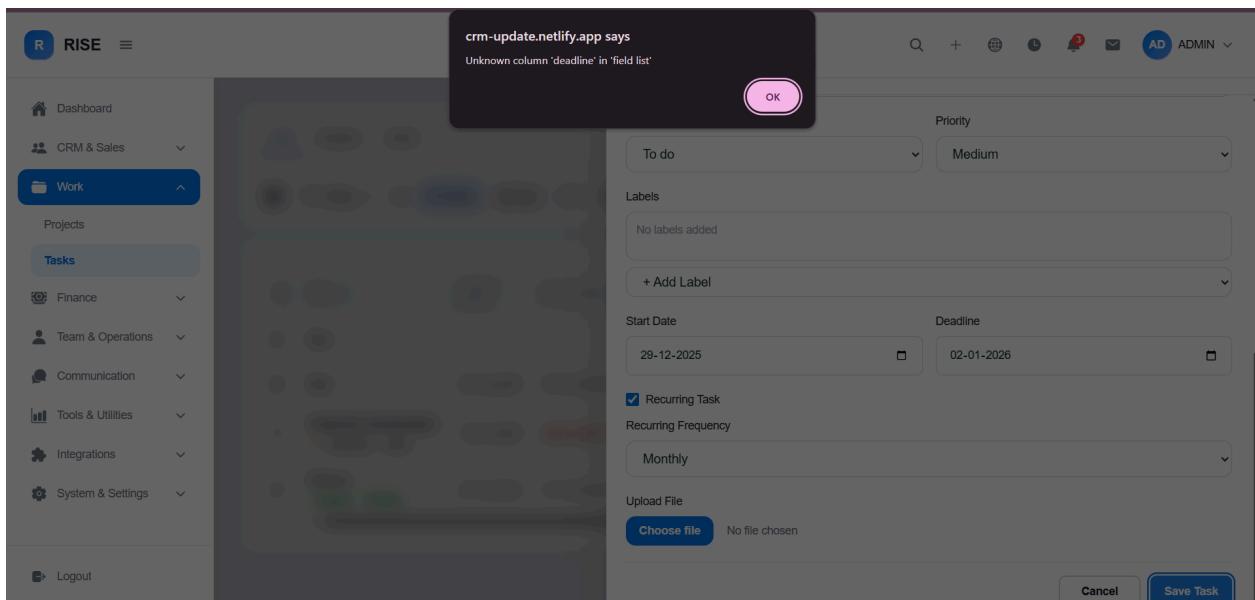
## Work → Tasks → Add multiple tasks



- The Collaborators field becomes blank after being filled.



Work → Tasks → list



- Unknown column 'deadline' in 'field list'

## Finance → Proposals → view

**Proposed Items:**

ITEM	QUANTITY	RATE	TOTAL
Demo De	1.00 Hour	\$12.00	\$12.24

**Summary:**

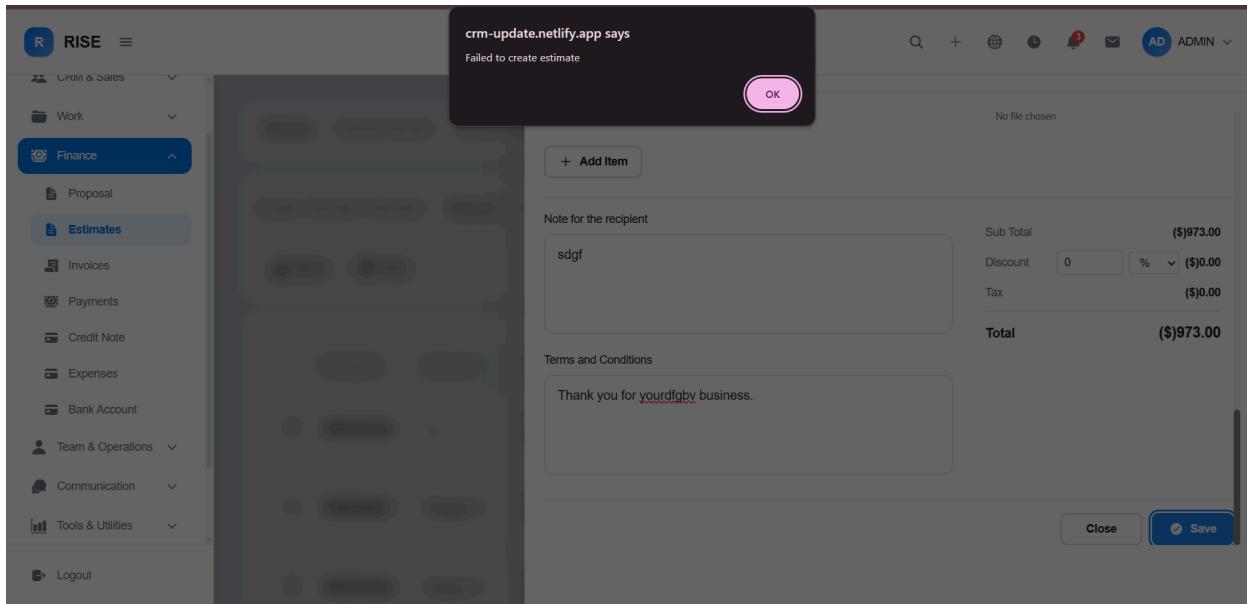
- Sub Total: \$12.00
- Discount: \$0.12
- Tax (10%): \$0.24
- Tax (10%): \$0.24
- Total:** \$12.12

- The Preview, Print, View PDF, Download PDF, Add item and Proposal URL buttons are not working

## Finance → Estimates

ESTIMATE	PROJECT	COMPANY	CLIENT	TOTAL	VALID TILL	ESTIMATE DATE	CREATED BY	STATUS
PROP#008	--	Default Company	DE demo client Default Company	\$0.00	29-12-2025	29-12-2025	Admin	Sent
PROP#007	Project 1	Default Company	DE Default Company	\$12.12	28-12-2025	29-12-2025	Admin	Draft
PROP#006	Project 1	Default Companv	DE Default Company	\$12.12	28-12-	27-12-2025	Admin	Accepted

- Excel and print update button is not working



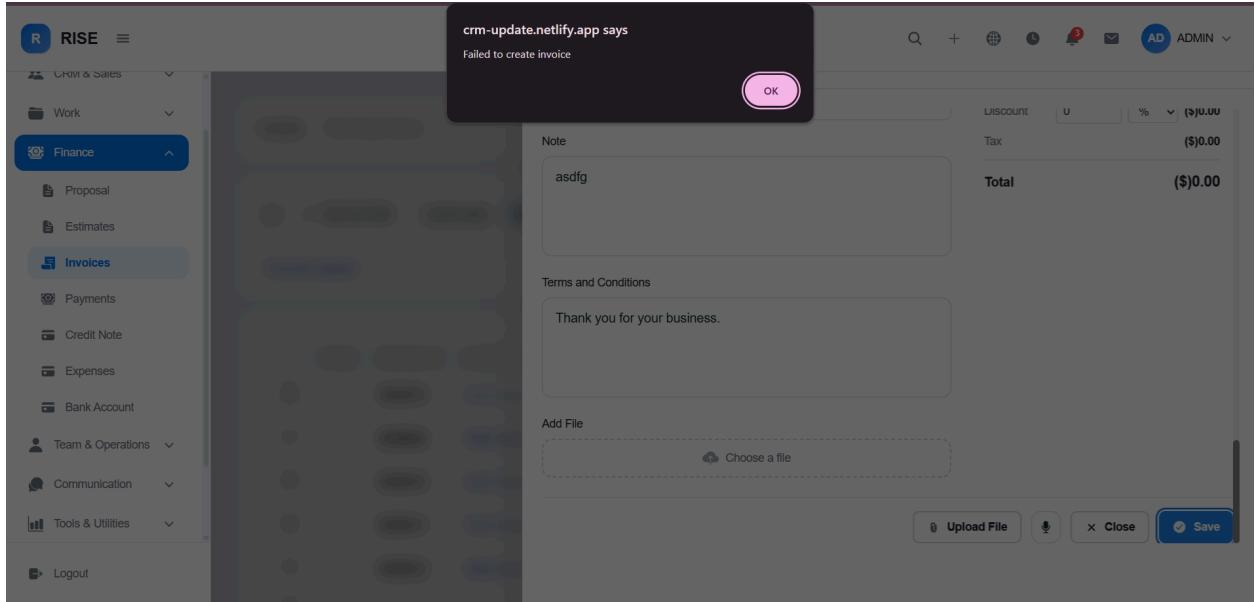
- When adding an estimate, the estimate is not being created and the process fails.

## Finance → Estimates→ view

The screenshot shows the "Estimates" view in the RISE CRM. On the left is a sidebar with "Finance" selected. The main area displays a list of estimates with details like ID, client, status, and amount. One estimate, "PROP#008", is selected and shown in a detailed view on the right. The "Estimate info" panel is open, showing "Client: demo client", "Document Actions" with "View PDF" highlighted, and "Signer info" fields for Name and Email. The "Estimate To" section shows the recipient's details: "demo client", "cxcc", "235353453456", and "democlient@gmail.com". The "Item" table shows one item: "fghjk f" with 1.00 Pcs at \$0.00, resulting in a Sub Total and Total of \$0.00.

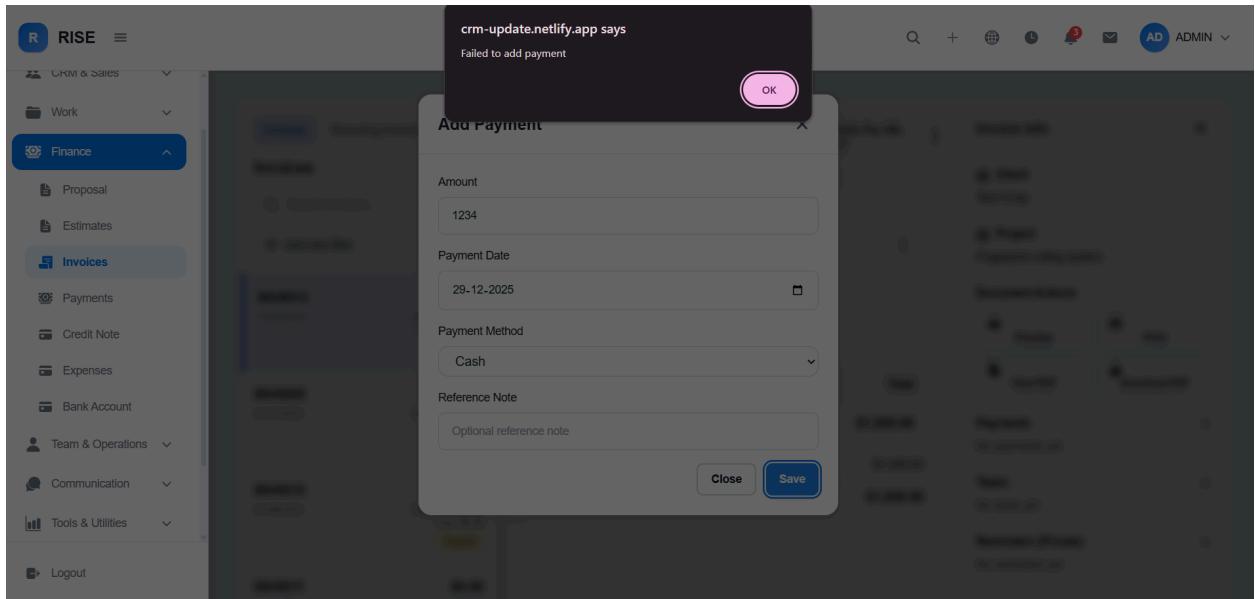
- The Preview, Print, View PDF, Download PDF, task and Proposal URL buttons are not working

## Finance → Invoices



- In this, neither the invoice is being created, nor is add payment working, and neither the Excel nor the Print button is working.

## Finance → Invoices→ view



- None of the functions are working in this.

## Finance → payment→add payment

The screenshot shows the RISE CRM interface. The left sidebar has a 'CRM & Sales' category with 'Work', 'Finance', 'Proposals', 'Estimates', 'Invoices', 'Payments' (which is selected and highlighted in blue), 'Credit Note', 'Expenses', 'Bank Account', 'Team & Operations', 'Communication', 'Tools & Utilities', and 'Logout'. The main area is titled 'Payment details' and contains the following fields:

- Company \*: Select Company First -- Please select a company to continue
- Invoice \*: Select Invoice --
- Project: --
- Paid On: 21-12-2025
- Amount \*: e.g. 10000
- Currency: USD (\$)
- Exchange Rate: 1
- Transaction Id: Enter transaction ID of the payment
- Payment Gateway: --

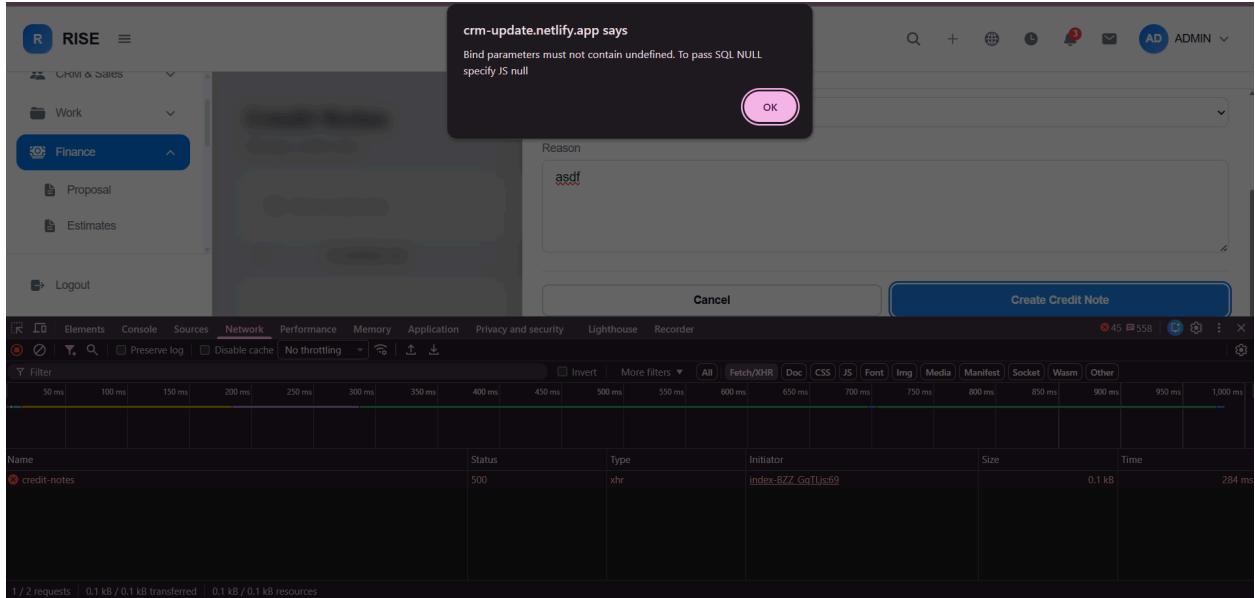
- Since the invoice is not being created, the add payment is also not working.
- Also, the add bulk payment is not working in this.
- Not work action button

## Finance → credit

The screenshot shows the RISE CRM interface. The left sidebar has a 'CRM & Sales' category with 'Work', 'Finance', 'Proposals', 'Estimates', 'Invoices', 'Payments', 'Credit Note' (selected and highlighted in blue), 'Expenses', 'Bank Account', 'Team & Operations', 'Communication', 'Tools & Utilities', and 'Logout'. A modal window titled 'crm-update.netlify.app says' displays an error message: 'Bind parameters must not contain undefined. To pass SQL NULL specify IS null'. The background shows a form for creating a credit note with the following fields:

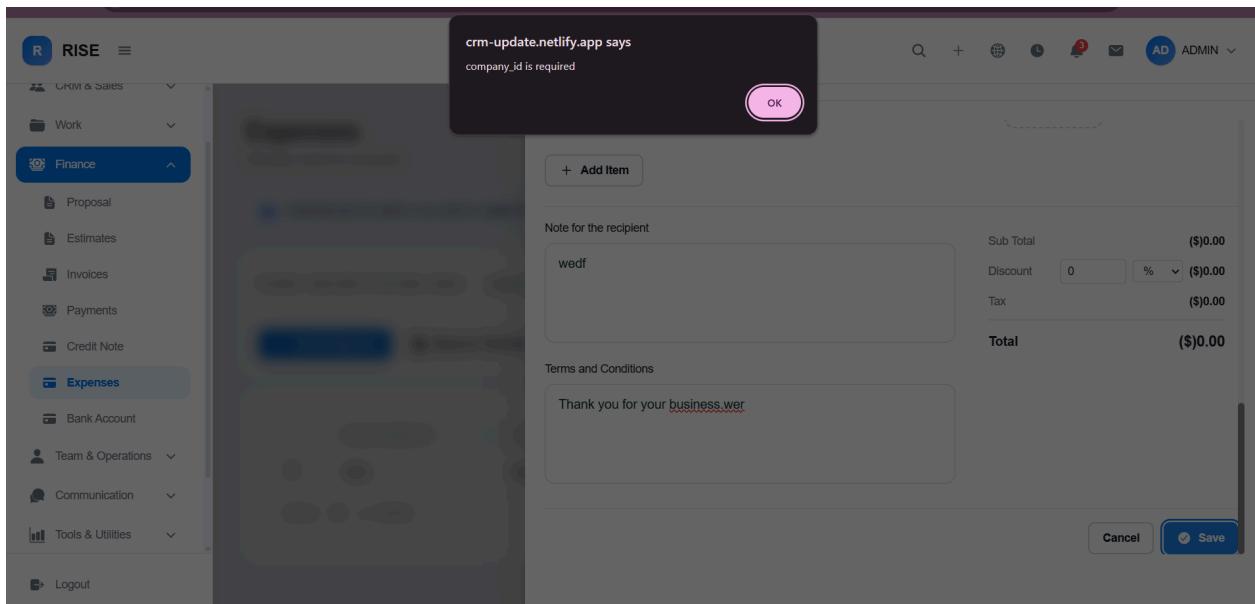
- Amount \*: 1234
- Date \*: 29-12-2025
- Status: Pending
- Reason: asdf

At the bottom of the form are 'Cancel' and 'Create Credit Note' buttons.



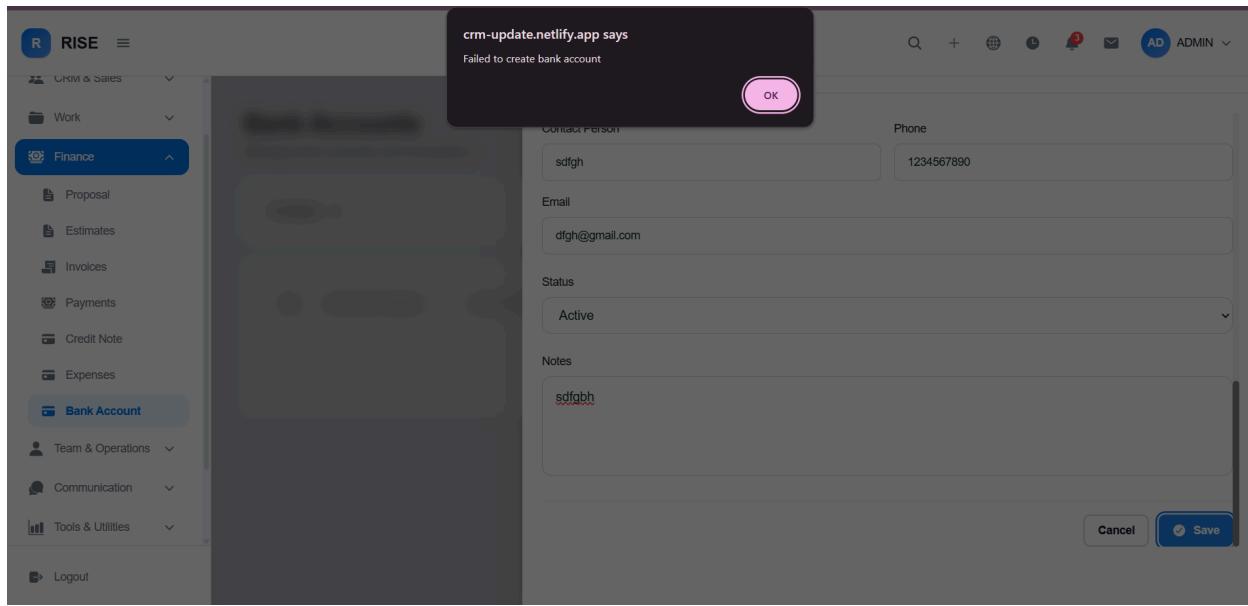
- The add/create note feature is not working.

Finance → Expences

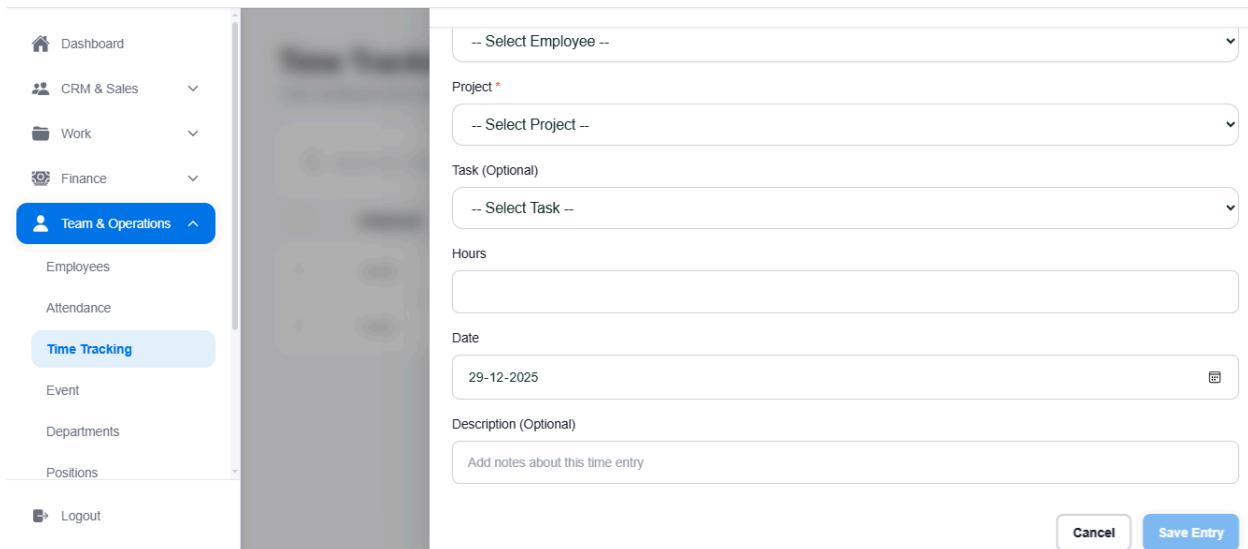


- The Create Expense function is not working, and the Company field in the create form is showing as required.
- Not working is action buttons and Expense Template Export

## Finance → bank account



- The Add Bank Account button is not working.



Isme save entry is button not properly working

Email Templates

Create and manage email templates

+ Add Template

Search templates...

Filters Columns

<input type="checkbox"/>	Template Name	Company	Category	Subject	Merge Tags	Actions
No data found						

## Bug Report

**Bug ID:** BR-ET-001

**Project Name:** CRM Application

**Module:** Email Templates

**Page:** Email Templates Listing Page

**Issue Title:** Email Templates GET API is not working properly – data not loading

---

### Description:

While testing the **Email Templates** module, it was observed that the email templates list is not loading. The page displays “**No data found**” even though templates are expected to be available. This indicates that the **GET API for Email Templates is not working or not returning data correctly**.

---

### Steps to Reproduce:

1. Login to the application
  2. Navigate to **Email Templates** module
  3. Observe the templates listing section
- 

### Expected Result:

- The system should fetch data from the **Email Templates GET API**

- All available email templates should be displayed in the table with:
    - Template Name
    - Company
    - Category
    - Subject
    - Merge Tags
    - Actions
- 

## **Actual Result:**

- The table shows “**No data found**”
  - No email templates are displayed
  - Indicates API response failure or incorrect data binding
- 

## **API Issue:**

- **GET Email Templates API not working properly**
  - Either:
    - API is not returning data
    - API is failing silently
    - Frontend is not handling the API response correctly
- 

## **Environment:**

- Application Type: Web Application
  - Module: Email Templates
  - Browser: Chrome
  - OS: Windows
- 

## **Severity: Medium**

## **Priority: High**

## **Status: Open**

---

## **Remarks / Developer Notes:**

- Verify Email Templates GET API endpoint
  - Check API response in Network tab
  - Ensure correct company/user context is passed
  - Validate frontend data mapping and state handling
- 

Aap next issue bhejiye (typing ya screenshot ke saath)

Main **isi level ka perfect bug report** bana deta rahunga ✓

The screenshot shows a web application interface for managing templates. At the top, there's a header with the title "Finance Templates". Below the header, a sub-header says "Manage templates for invoices, proposals, estimates, and expenses". On the right side of the header is a blue button labeled "+ Add Template". The main content area is a light gray box containing the text "No templates found. Create your first template!". There are no other visible elements or data.

## **Bug Report**

**Bug ID:** BR-FT-002

**Project Name:** CRM Application

**Module:** Finance Templates

**Page:** Finance Templates Listing Page

**Issue Title:** Finance Templates GET API not working – templates not loading

---

### **Description:**

During testing of the **Finance Templates** module, it was observed that the templates list is not loading. The page shows the message "**No templates found. Create your first template!**" even though templates are expected to be available. This indicates that the **Finance Templates GET API is not functioning correctly** or data is not being fetched/rendered properly.

---

### **Steps to Reproduce:**

1. Login to the application
  2. Navigate to **Finance Templates**
  3. Observe the templates listing section
- 

### **Expected Result:**

- System should call the **Finance Templates GET API**
  - Existing templates should be displayed in the list
  - Message “**No templates found**” should appear only when there is genuinely no data
- 

### **Actual Result:**

- Templates list is empty
  - System displays “**No templates found. Create your first template!**”
  - No data rendered in the UI
- 

### **API Issue:**

- **Finance Templates GET API not working properly**
- Possible causes:
  - API not returning data
  - Incorrect company/user context
  - API failure or empty response
  - Frontend not mapping response correctly

---

**Environment:**

- Application Type: Web Application
  - Module: Finance Templates
  - Browser: Chrome
  - OS: Windows
- 

**Severity: Medium****Priority: High****Status: Open**

---

**Remarks / Developer Notes:**

- Verify Finance Templates GET API endpoint
  - Check API response in Network tab
  - Validate request parameters (companyId / auth token)
  - Ensure frontend state and table rendering logic
- 

Aap next issue bhejiye (screenshot ya typing me)

Main **isi format me perfect bug reports** banata rahunga ✓

# Employee Dashboard

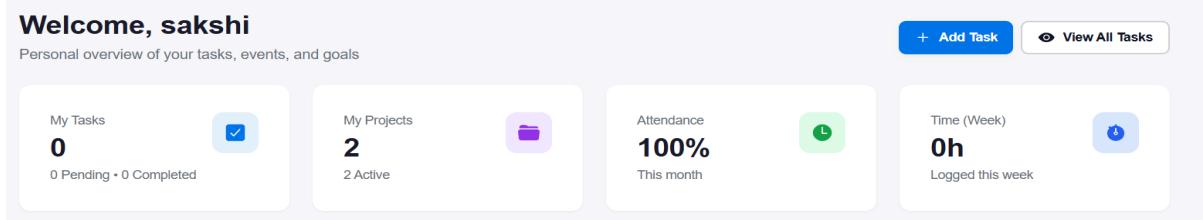
# 🐞 UI Text Issue Report

**Module / Dashboard:**

Employee Dashboard

**Page / Section:**

Top Header – Task Action Button



**Issue Title:**

Incorrect button label shown as “**Add Task**” instead of “**Task**”

**Description:**

On the Employee Dashboard, the action button displayed in the top-right section is labeled as “**Add Task**”. As per the required UI/UX flow, this button should be labeled “**Task**” only.

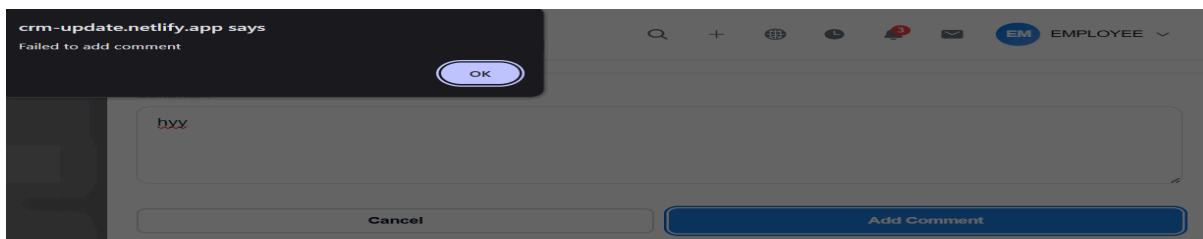
# 🐞 Bug Report #1 – Comment Add Not Working (500 Error)

**Module / Dashboard:**

Employee Dashboard

**Menu / Page:**

My Tasks → Action → View Details → Comments



**Issue Title:**

Unable to add comment on task – 500 Internal Server Error

**Description:**

In the **My Tasks** section, when an employee opens a task using the **View Details** option and tries to add a comment, the comment is not saved. A popup error message appears saying “Failed to add comment”.

**Steps to Reproduce:**

1. Login as **Employee**
2. Go to **My Tasks**
3. Click on **View Details** icon of any task
4. Scroll to **Comments** section
5. Click on **Add Comment**
6. Enter text and submit

**Expected Result:**

The comment should be successfully added and displayed under the Comments section.

**Actual Result:**

Comment is not added and an error popup appears:  
“Failed to add comment” (500 error)

**Error Message:**

Failed to add comment  
(500 Internal Server Error)

 **Bug Report #2 – File Download Redirects to Login Page****Module / Dashboard:**

Employee Dashboard

**Menu / Page:**

[My Tasks](#) → [Action](#) → [View Details](#) → [Files](#)

**Issue Title:**

File (PDF) download redirects user to login page

**Description:**

In the **Files** section of task details, when an employee clicks on the uploaded file (PDF), the file does not download. Instead, the system redirects the user to the **login page**, even though the user is already logged in.

**Steps to Reproduce:**

1. Login as **Employee**
2. Go to **My Tasks**
3. Open any task using **View Details**
4. Scroll to **Files** section
5. Click on the uploaded PDF file

**Expected Result:**

The file should download or open in a new tab.

**Actual Result:**

User is redirected to the **login page** instead of downloading the file.

**Impact / Severity:**

High – File access and document download is blocked



## Bug Report – Missing “View Details” Action in Time Tracking

**Module / Dashboard:**

Employee Dashboard

**Menu / Page:**

[Time Tracking](#)

**Issue Title:**

“View Details” option missing in Time Tracking action menu

**Description:**

In the **Time Tracking** module of the Employee Dashboard, the **Actions** column does not

provide a “**View Details**” option for time entries. Only edit and delete icons are visible. As per expected functionality and consistency with other modules (like My Tasks), a **View Details** option should be available to view complete time entry information.

#### Steps to Reproduce:

1. Login as **Employee**
2. Open **Time Tracking** menu
3. Check the **Actions** column for any time entry



## Bug Report – Document Download Not Working

#### Module / Dashboard:

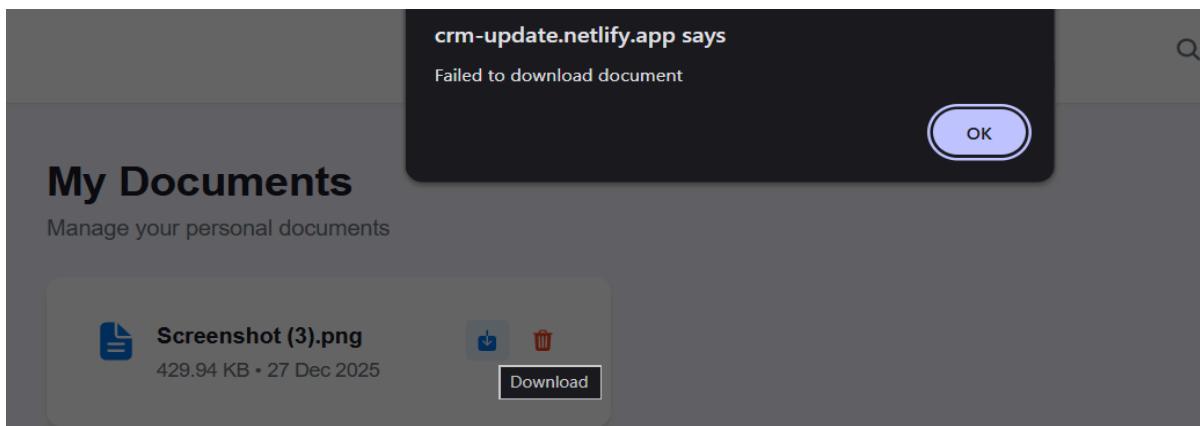
Employee Dashboard

#### Menu / Page:

[My Documents](#)

#### Issue Title:

Unable to download document – “Failed to download document” error



#### Description:

In the **My Documents** section of the Employee Dashboard, when an employee clicks on the **Download** icon for an uploaded document (PDF / image), the file does not download. Instead, a popup error message appears saying “**Failed to download document**”.

#### Steps to Reproduce:

1. Login as **Employee**
2. Open **My Documents** menu
3. Click on the **Download** icon of any uploaded document

**Expected Result:**

The document should download successfully or open in a new tab.

**Actual Result:**

Download fails and an error popup appears:

**“Failed to download document”**

**Impact / Severity:**

High – Employee cannot access or download their own documents

**Possible Cause (Suggestion):**

- File download API not responding correctly
- Authentication token not passed in download request
- Incorrect or expired file URL

## **Bug Report – Leave Request Create / Update / Delete Failing (500 Error)**

**Module / Dashboard:**

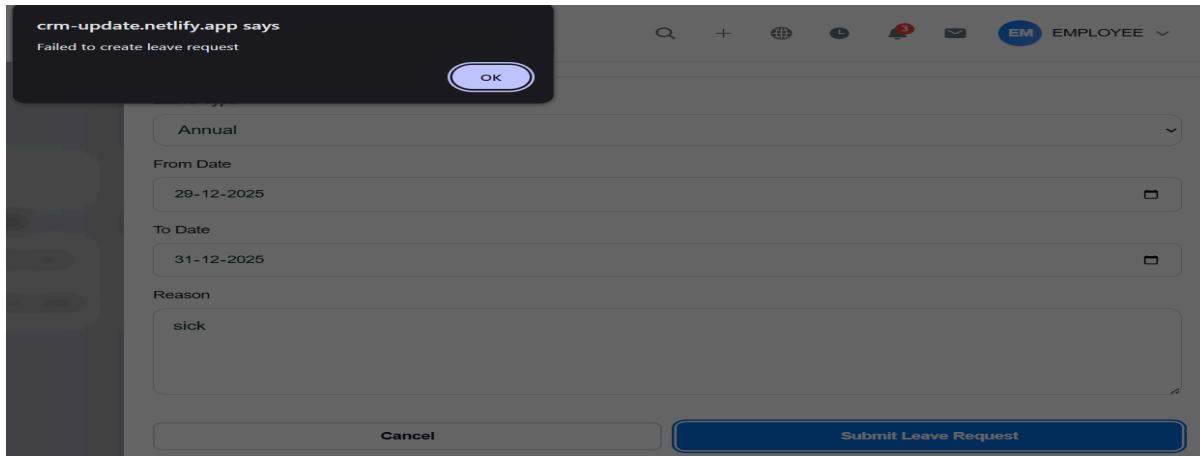
Employee Dashboard

**Menu / Page:**

Leave Requests

**Issue Title:**

Leave request create, update, and delete actions failing with 500 Internal Server Error

**Description:**

In the **Leave Requests** module of the Employee Dashboard, employees are unable to **create**, **update**, or **delete** leave requests. When submitting the **Add Leave** form, an error popup appears saying "**Failed to create leave request**". The same 500 Internal Server Error occurs while updating or deleting an existing leave request.

**Steps to Reproduce (Create):**

1. Login as **Employee**
2. Go to **Leave Requests**
3. Click on **Add Leave**
4. Fill in all required fields (Leave Type, From Date, To Date, Reason)
5. Click **Submit Leave Request**

**Steps to Reproduce (Update / Delete):**

1. Login as **Employee**
2. Open **Leave Requests**
3. Click **Edit** or **Delete** action on an existing leave request

**Expected Result:**

- Leave request should be created successfully
- Existing leave request should be updated or deleted successfully
- Status should update accordingly (Pending / Approved / Rejected)

#### **Actual Result:**

- Leave request is not created
- Update and delete actions also fail
- Popup error message appears:  
**“Failed to create leave request”**
- API returns **500 Internal Server Error**

#### **Technical Details (From Network Tab):**

- **Request URL:** `/api/v1/leave-requests`
- **Request Method:** POST (also PUT / DELETE)
- **Status Code:** 500 – Internal Server Error

#### **Impact / Severity:**

Critical – Leave management feature is completely unusable for employees

#### **Possible Cause (Suggestion):**

- Backend validation error not handled properly
- Required fields missing or mismatched with backend schema
- Date format issue between frontend and backend
- Employee ID / authentication token not being processed correctly

# Client Dashboard

The screenshot shows the Client Dashboard interface. On the left, there's a sidebar with navigation links: Dashboard, Projects (which is highlighted in blue), Proposals, Store, Files, and Logout. The main area has fields for Project Name (containing 'a') and Description (with placeholder text 'Describe your project...'). Below these are 'Start Date' and 'Deadline' fields. At the bottom of the main area, there's a network performance summary: 3 / 8 requests, 0.7 kB / 1.5 kB transferred, 18.3 kB / 2,330 kB resources, Finish: 1.71 s, DOMContentLoaded: 413 ms, and Load: 534 ms. The bottom part of the screenshot shows the Network tab of the developer tools. It displays a timeline with various request segments. A tooltip for one segment says 'Activate Windows Go to Settings to activate Windows.' The developer tools also show a status bar with 564 errors.

Client dashboard -> project menu -> when we create project input field take only one letter

The screenshot shows the Client Dashboard with an error message: 'Failed to update project'. An 'OK' button is visible. The developer tools Network tab is open, showing a table of network requests. One specific request is highlighted in brown: 'projects?company\_id=1&client\_id=12' with a status of 500, type 'xhr', initiator 'index-BZZ\_GoTljs69', size 1.0 kB, and time 264 ms. A tooltip for this request says 'Activate Windows Go to Settings to activate Windows'. The developer tools also show a status bar with 2 errors.

Name	Status	Type	Initiator	Size	Time
projects?company_id=1&client_id=12	500	xhr	index-BZZ_GoTljs69	1.0 kB	264 ms
projects	201	xhr	index-BZZ_GoTljs69		241 ms
projects?company_id=1&client_id=12	200	xhr	index-BZZ_GoTljs69		259 ms

Client dashboard -> project menu -> when we update project details it doesn't update and shows error 500

The screenshot shows a browser window for 'crm-update.netlify.app/app/client/store'. A modal dialog box in the center says 'crm-update.netlify.app says' and 'Failed to create order' with an 'OK' button. The main page has a sidebar with 'Dashboard', 'Projects', 'Documents', and 'Logout'. At the bottom right are buttons for 'Cancel' and 'Place Order'. The Network tab in the developer tools shows several XHR requests:

Name	Status	Type	Initiator	Size	Time
settings	304	xhr	index-BZZ_GoTljs:69	0.1 kB	391 ms
orders	500	xhr	index-BZZ_GoTljs:69	0.2 kB	239 ms
orders	500	xhr	index-BZZ_GoTljs:69		Activate Windows
orders	(pending)	xhr	index-BZZ_GoTljs:69		Go to Settings

At the bottom of the Network tab, it says '5 / 20 requests 0.4 kB / 1.2 kB transferred 16.8 kB / 2,565 kB resources Finish: 39.23 s DOMContentLoaded: 624 ms Load: 787 ms'.

This screenshot shows the Network tab in the developer tools with a specific XHR request selected. The response tab is active, displaying the following JSON data:

```

1  {
  "success": false,
  "error": "Failed to create order",
  "details": "Table 'railway.orders' doesn't exist"
}

```

The status bar at the bottom indicates 'Activate Windows Go to Settings to activate Windows.'

Client dashboard -> store -> doesn't integrate api in this component , and doesn't working placed order api it shows 500 error



Client dashboard -> files -> when i click on view button it navigate to landing page instead of showing modal with file details

The screenshot shows the RISE browser extension interface. The title bar indicates the URL is `crm-update.netlify.app/app/client/subscriptions`. The main content area is titled "Subscriptions" with the sub-instruction "View your active subscriptions". Below this is a network monitoring tool with tabs for "Network", "Performance", "Memory", "Application", and "Lighthouse". The "Network" tab is selected. A timeline at the top shows various request intervals. Below the timeline is a table with columns: "Name", "Headers", "Payload", "Preview", "Response", "Initiator", and "Timing". The "Response" column contains a red error message: 

```
1 {"success":false,"error":"Failed to fetch subscriptions"}
```

. At the bottom of the interface, there is a status bar with the text "3 / 7 requests", "0.3 kB / 0.9 kB transferred", "16.6 kB / 2,328 kB resources", and "Finish: 1".

Client dashboard -> billing -> subscription -> shows error 500

This screenshot is similar to the previous one, showing the RISE browser extension interface. The title bar shows the URL `crm-update.netlify.app/app/client/orders`. The main content area is titled "Orders" with the sub-instruction "View and manage your orders". A blue button labeled "+ Add order" is visible. Below this is the same network monitoring tool with the "Network" tab selected. The timeline and table structure are identical to the first screenshot, showing a failed request with the response payload: 

```
1 {"success":false,"error":"Failed to fetch orders"}
```

.

Client dashboard -> billing -> orders -> shows error 500

crm-update.netlify.app/app/client/tickets

**RISE**

crm-update.netlify.app says  
Failed to create ticket

OK

Network Performance Memory Application Lighthouse

Filter Invert More filters All Fetch/XHR Doc CSS JS Font Img Media Manifest Socket Wasm Other

Name	Status	Type	Initiator	Size	Time
tickets?company_id=1&client_id=12	304	xhr	index-BZZ_GoTljs:69	0.0 kB	512 ms
settings	304	xhr	index-BZZ_GoTljs:69	0.0 kB	624 ms
me?user_id=12	304	xhr	index-BZZ_GoTljs:69	0.1 kB	477 ms
<b>tickets</b>	<b>500</b>	<b>xhr</b>	<b>index-BZZ_GoTljs:69</b>	<b>0.1 kB</b>	<b>460 ms</b>

Activate Windows  
Go to Settings to activate Windows.

4 / 9 requests | 0.3 kB / 1.0 kB transferred | 16.6 kB / 2,328 kB resources | Finish: 18.91 s | DOMContentLoaded: 434 ms | Load: 564 ms

Elements Console Sources Network Performance Memory Application Lighthouse

Preserve log Disable cache No throttling

Filter Invert More filters All Fetch/XHR Doc CSS JS Font Img Media Manifest Socket Wasm Other

Name	Headers	Payload	Preview	Response	Initiator	Timing
tickets?company_id=1&client_id=12				1 {"success":false,"error":"Failed to create ticket"}		
settings						
me?user_id=12						
<b>tickets</b>						

Client dashboard -> ticket -> when we create ticket it shows error 500