

Admin:-

Leads

ID	FILE	SIZE	UPLOADED BY	CREATED DATE	ACTIONS
3	Screenshot (3).png	429.94 KB	-	27/12/2025	
2	Screenshot (3).png	429.94 KB	-	27/12/2025	
1	Screenshot (3).png	429.94 KB	-	24/12/2025	

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

Leads → leads name → view → files → download

crm-update.netlify.app says
Failed to download file

OK

Name	Status	Type	Initiator	Size	Time
download	404	xhr	index.B27_Go11sc69	0.8 kB	1.36 s

requests: 773 B transferred | 52 B resources

- Failed to download file

Clients

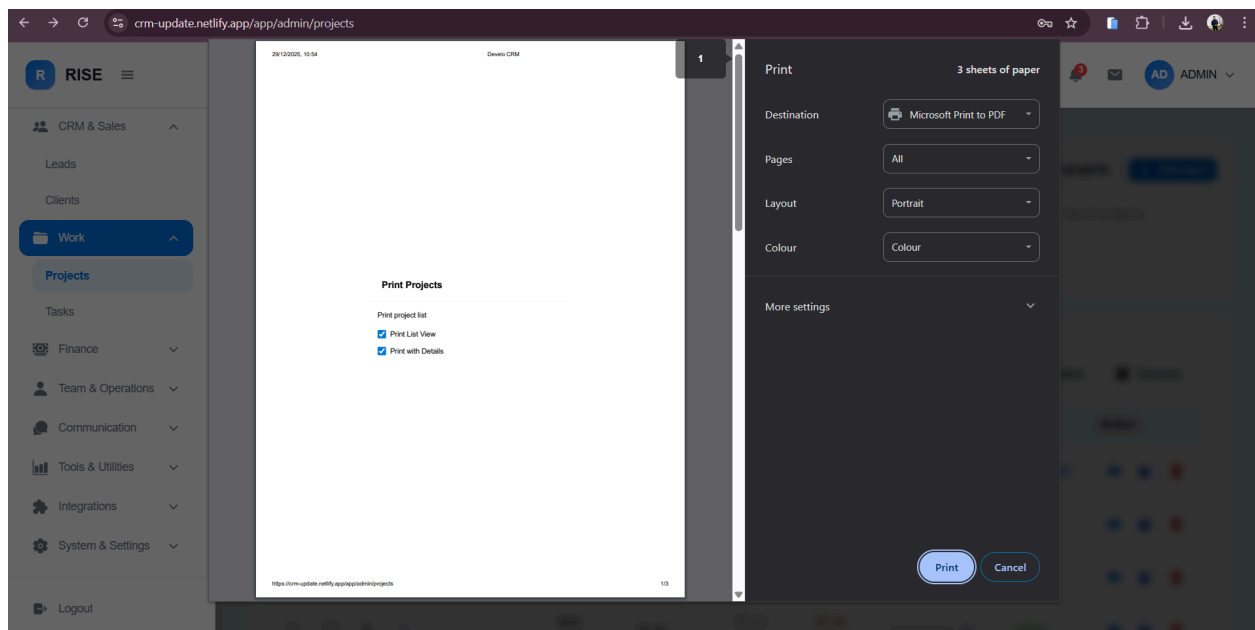
The screenshot shows the RISE CRM interface. The sidebar on the left contains navigation links: Dashboard, CRM & Sales (selected), Leads, Clients, Work, Finance, Team & Operations, Communication, Tools & Utilities, Integrations, System & Settings, and Logout. The main content area is titled 'Client 1' and includes tabs for Overview, Projects, Subscriptions, Invoices, Payments, and Statements. The 'Overview' tab is active, showing a list of clients on the left and a summary of client data on the right. The summary includes counts for Projects, Subscriptions, Orders, Estimates, and Proposals, all showing '0'. Below this is an 'Invoice Overview' section with a 'View all' link. The client information on the right includes: Client Name (Client 1), Email (stafffff@example.com), Address (Bholaram ustad Marg Indore, Shivampuri Colony Bholaram ustad marg Indore Indore, Indian, 452001, India), Phone (+1 578765), and Site (erh.com).

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

The screenshot shows the RISE CRM interface with the 'Clients' list view. The sidebar on the left contains navigation links: Dashboard, CRM & Sales (selected), Leads, Clients, Work, Finance, Team & Operations, Communication, Tools & Utilities, Integrations, System & Settings, and Logout. The main content area is titled 'Clients' and includes tabs for Overview, Clients (selected), and Contacts. The 'Clients' tab is active, showing a list of clients with columns for ID, Name, Email, Phone, Projects, Total Invoiced, Payment Received, Due, and Actions. The list includes clients like 'Client 1', 'Jojo', and 'demo client'. The 'Actions' column contains icons for edit, delete, and other actions.

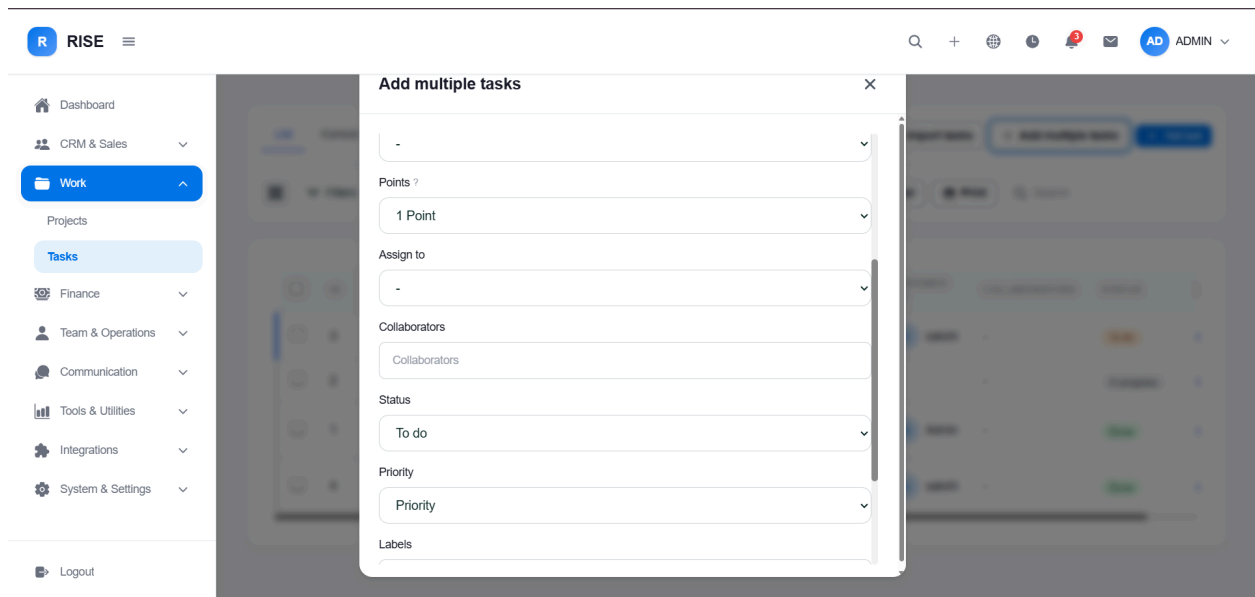
- When updating, the updated data is not showing, but when viewing, the updated data is visible.

Work → Project

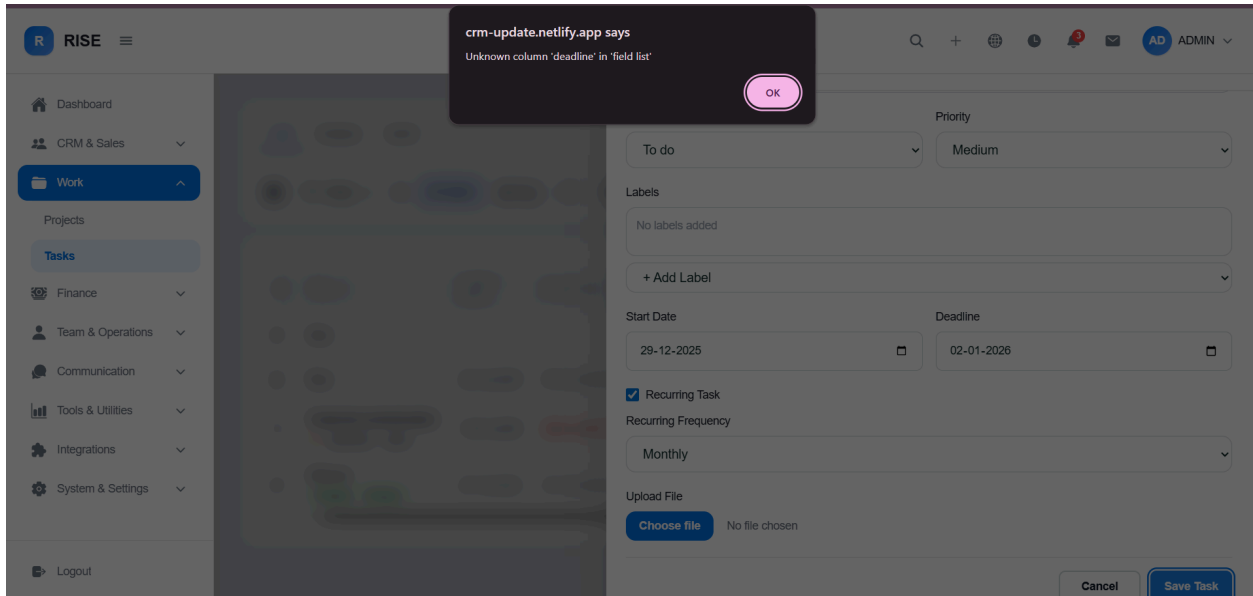


- When printing, the normal print works correctly, but the Excel sheet is not printing.

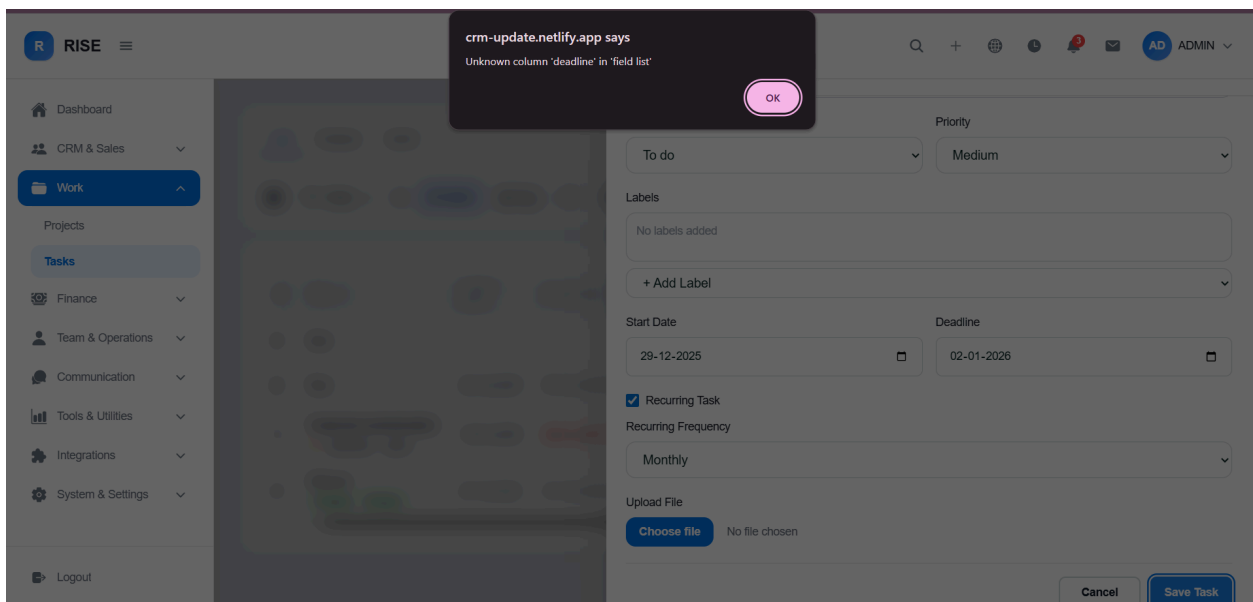
Work → Tasks → Add multiple tasks



- The Collaborators field becomes blank after being filled.



Work → Tasks → list



- Unknown column 'deadline' in 'field list'

Finance → Proposals → view

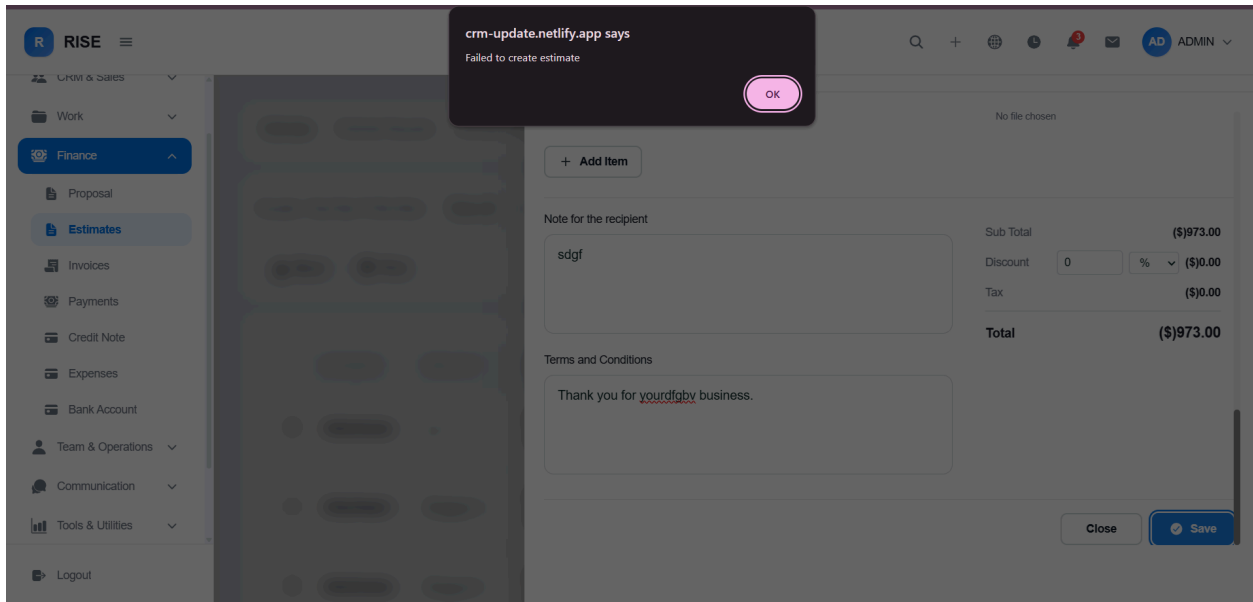
The screenshot shows the 'Proposals' view in the RISE Finance application. The left sidebar contains a navigation menu with 'Finance' selected, showing sub-items like Proposal, Estimates, Invoices, Payments, Credit Note, Expenses, Bank Account, Team & Operations, Communication, Tools & Utilities, and Logout. The main content area displays 'PROP#007' as a 'Draft' from '29-12-2025'. It includes a 'Proposal URL' button, a 'Filters' dropdown, and a search bar. The 'Proposal items' table lists one item: 'Demo' with a quantity of '1.00 Hour', a rate of '\$12.00', and a total of '\$12.24'. Below the table, there is an 'Add item' button and a summary section showing 'Sub Total: \$12.00', 'Discount: \$0.12', 'Tax (10%): \$0.24', and a 'Total: \$12.12'. On the right, the 'Proposal info' section shows 'Default Company', 'Proposal date: 29-12-2025', and 'Valid until: 28-12-2025'. Below this are buttons for 'Q Preview', 'Print', 'View PDF', and 'Download PDF'. A 'Note' section contains the text 'Demo', and a 'Signer info' section shows the name 'Jane Hand'.

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

Finance → Estimates

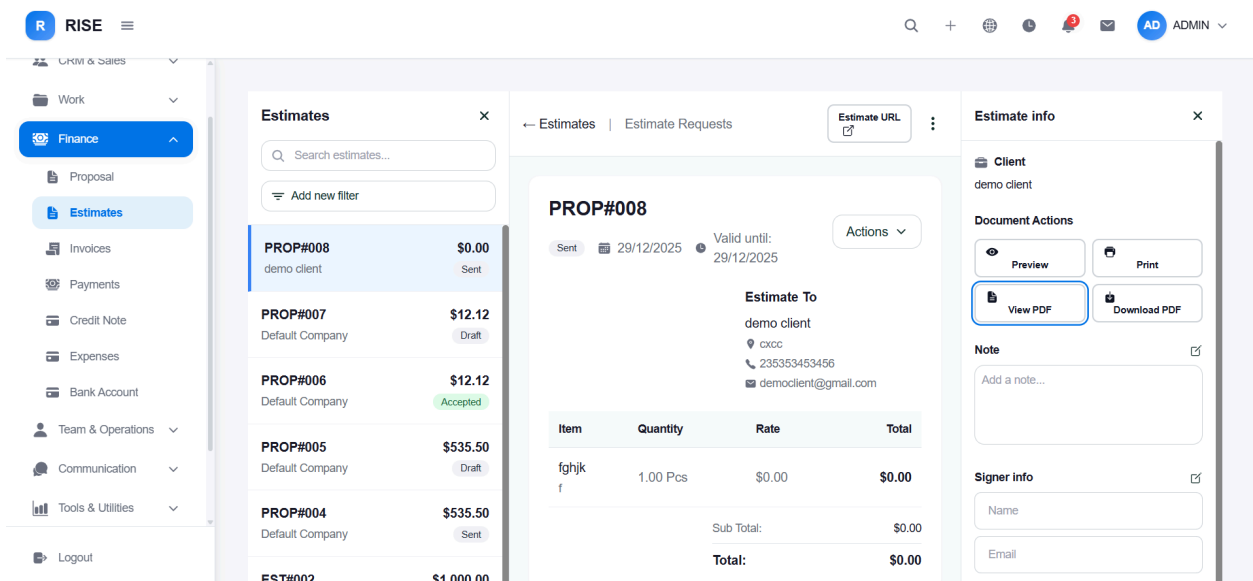
The screenshot shows the 'Estimates' view in the RISE Finance application. The left sidebar is the same as in the previous screenshot. The main content area displays a list of estimates. At the top, there are tabs for 'Estimates', 'Estimate Requests', and 'Estimate Request Forms', with a '+ Add estimate' button. Below the tabs, there are filters for 'Duration', 'Start Date To End Date', and 'Status All'. There are also 'Excel' and 'Print' buttons. The estimates table has columns: ESTIMATE, PROJECT, COMPANY, CLIENT, TOTAL, VALID TILL, ESTIMATE DATE, CREATED BY, and STATUS. The table contains three rows: 1. 'PROP#008' with a total of '\$0.00', valid till '29-12-2025', estimate date '29-12-2025', created by 'Admin', and status 'Sent'. 2. 'PROP#007' with a total of '\$12.12', valid till '28-12-2025', estimate date '29-12-2025', created by 'Admin', and status 'Draft'. 3. 'PROP#006' with a total of '\$12.12', valid till '28-12-2025', estimate date '27-12-2025', created by 'Admin', and status 'Accepted'.

- Excel and print update button is not working



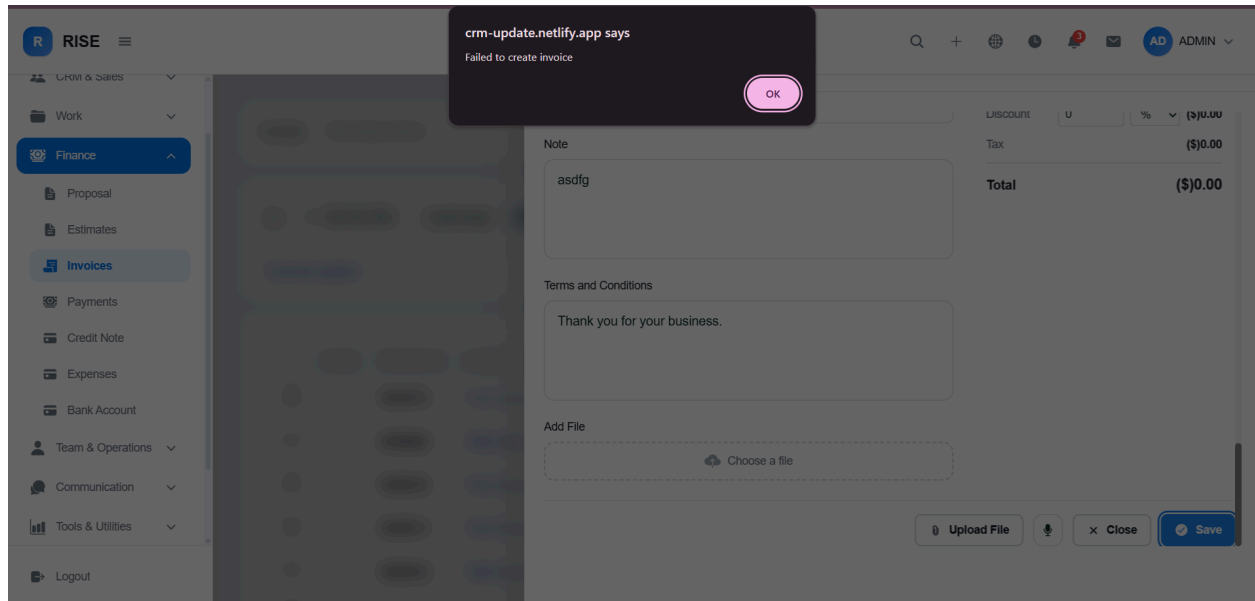
- When adding an estimate, the estimate is not being created and the process fails.

Finance → Estimates → view



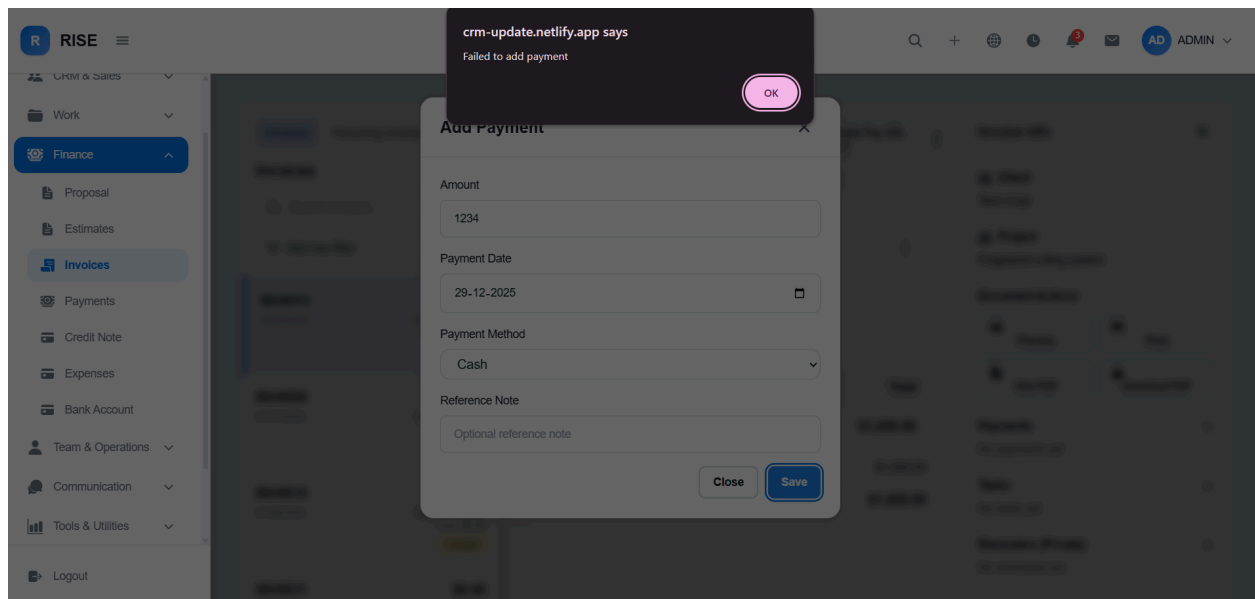
- The Preview, Print, View PDF, Download PDF, task and Proposal URL buttons are not working

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.

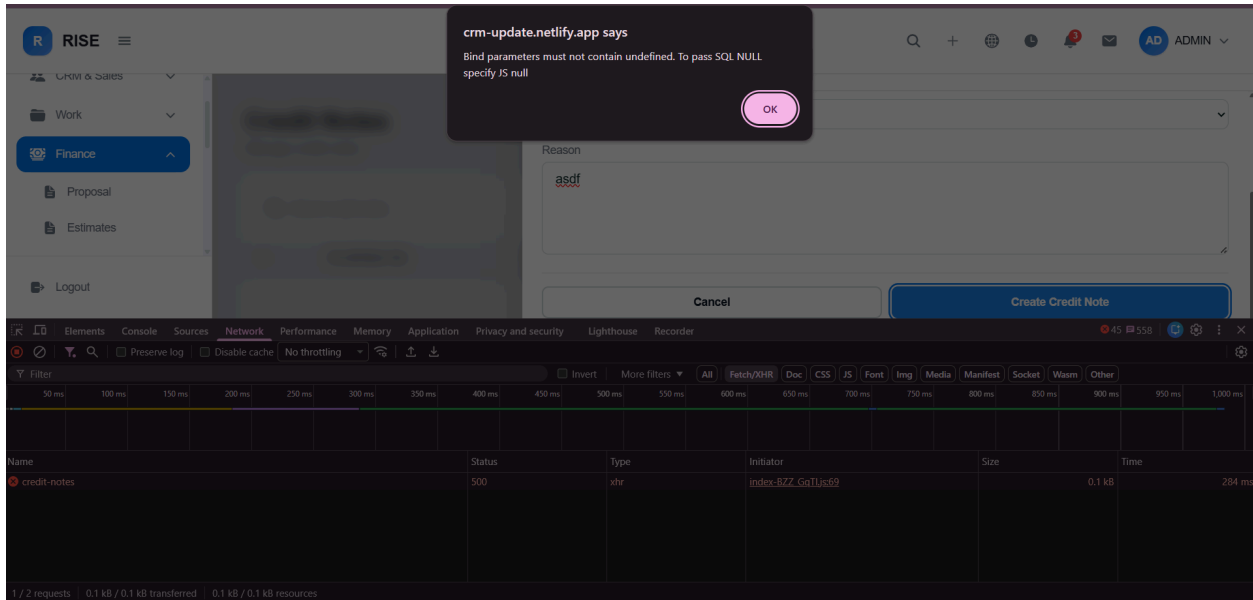
Finance → payment→add payment

The screenshot shows the 'Add Payment' form in the RISE CRM system. The left sidebar contains a navigation menu with 'Finance' selected, showing sub-items like Proposal, Estimates, Invoices, Payments, Credit Note, Expenses, Bank Account, Team & Operations, Communication, and Tools & Utilities. The main form area is titled 'Payment details' and contains several input fields: 'Company' (dropdown with '-- Select Company First --'), 'Invoice' (dropdown with '-- Select Invoice --'), 'Project' (dropdown with '--'), 'Paid On' (date field with '21-12-2025'), 'Amount' (text field with 'e.g. 10000'), 'Currency' (dropdown with 'USD (\$)'), 'Exchange Rate' (text field with '1'), 'Transaction Id' (text field with placeholder 'Enter transaction ID of the payment'), and 'Payment Gateway' (dropdown with '--'). A message 'Please select a company to continue' is displayed below the Company dropdown.

- 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

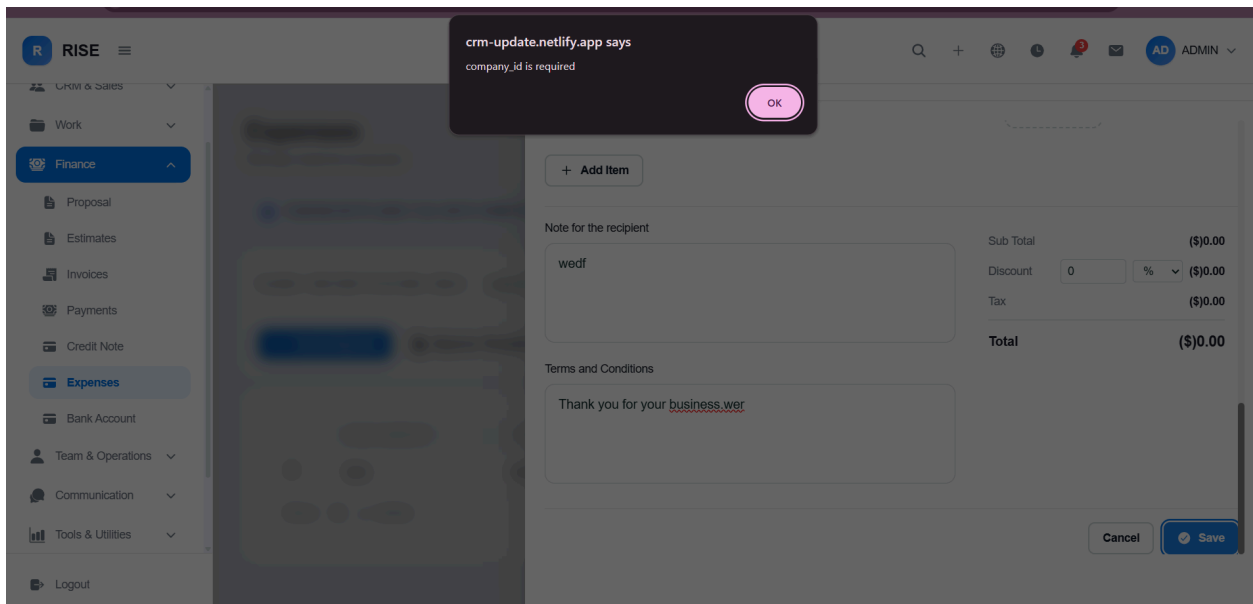
Finance → credit

The screenshot shows the 'Add Credit Note' form in the RISE CRM system. The left sidebar contains a navigation menu with 'Finance' selected, showing sub-items like Proposal, Estimates, Invoices, Payments, Credit Note, Expenses, Bank Account, Team & Operations, Communication, and Tools & Utilities. The main form area is titled 'Credit Note' and contains several input fields: 'Amount' (text field with '1234'), 'Date' (date field with '29-12-2025'), 'Status' (dropdown with 'Pending'), and 'Reason' (text area with 'asdf'). A message 'INV#015 - \$1,000' is displayed above the Amount field. At the bottom, there are 'Cancel' and 'Create Credit Note' buttons. An error message dialog box is overlaid on the form, stating: 'crm-update.netlify.app says: Bind parameters must not contain undefined. To pass SQL NULL specify JS null'. The dialog box has an 'OK' button.



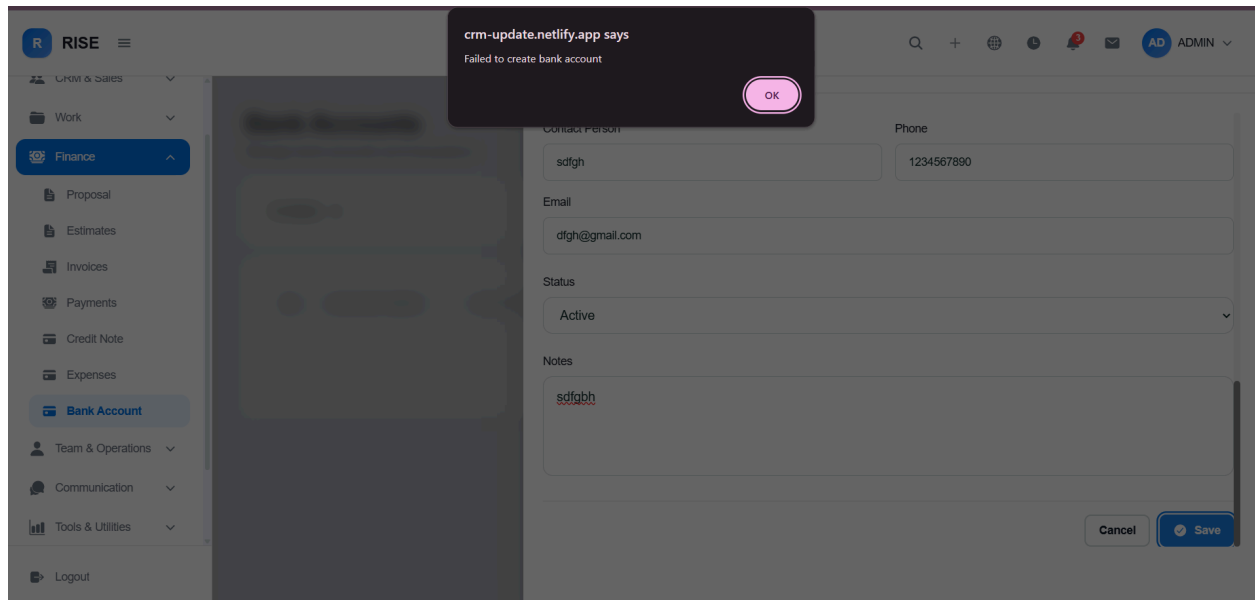
- The add/create note feature is not working.

Finance → Expenses

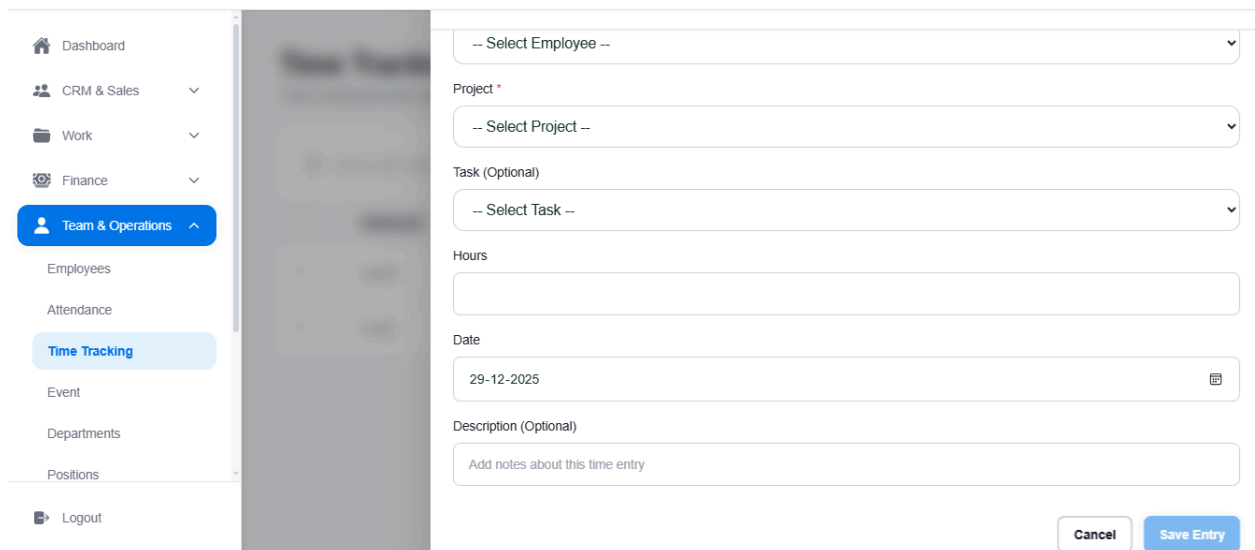


- The Create Expense function is not working, and the Company field in the create form is showing as required.
- Not working is action buttons and Expense Template Export

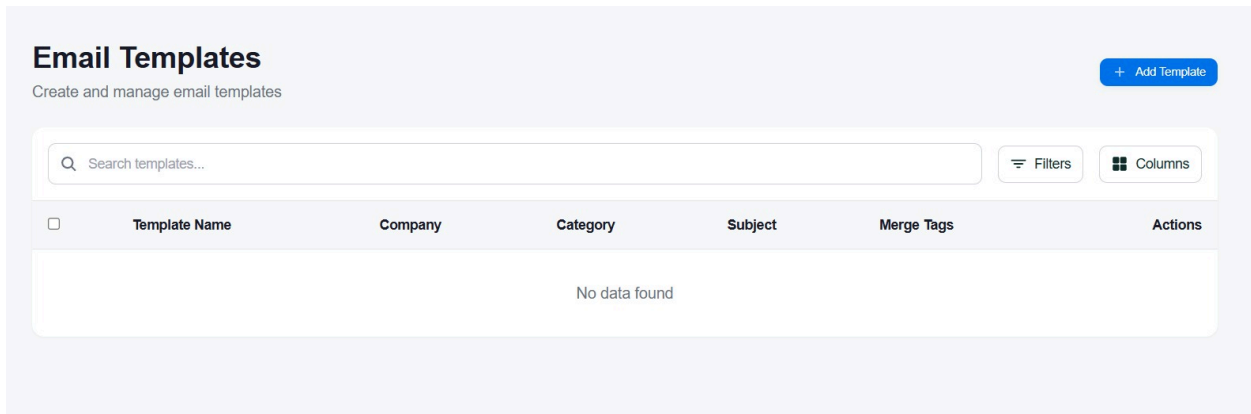
Finance → bank account



- The Add Bank Account button is not working.



Isme save entry is button not properly working



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

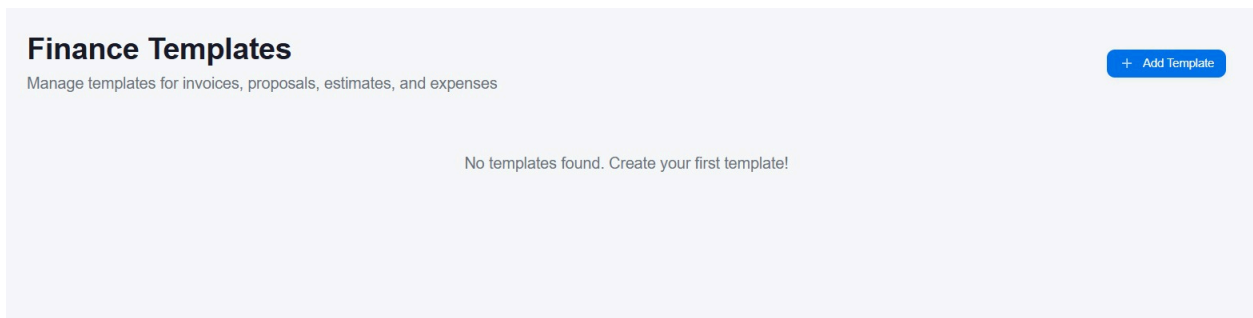
Status: Open

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 



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

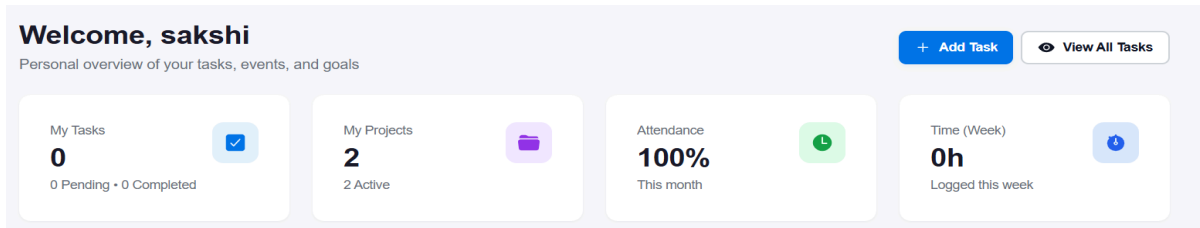
UI Text Issue Report

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.

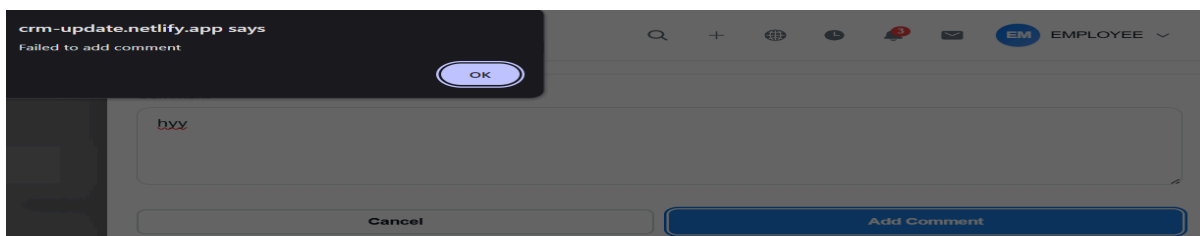
Bug Report #1 – Comment Add Not Working (500 Error)

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:

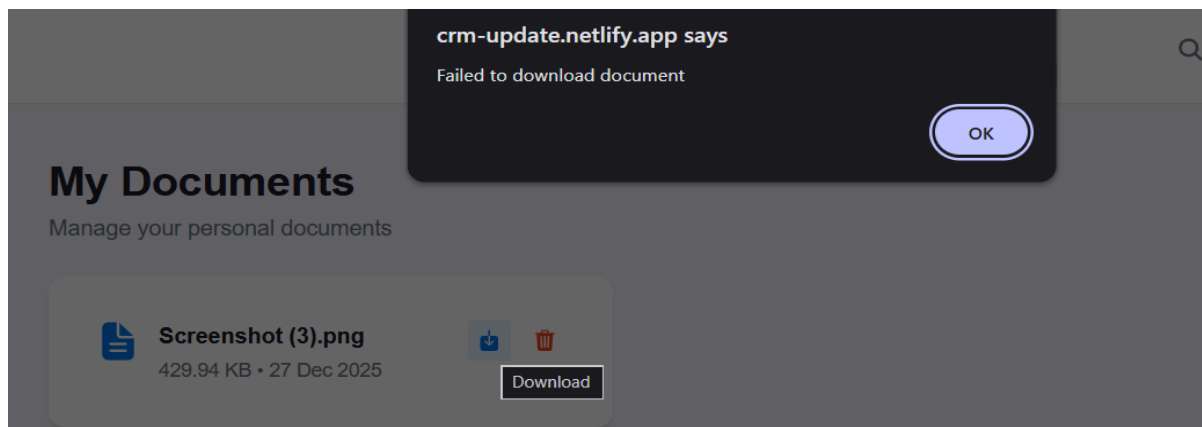
Employee Dashboard

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:

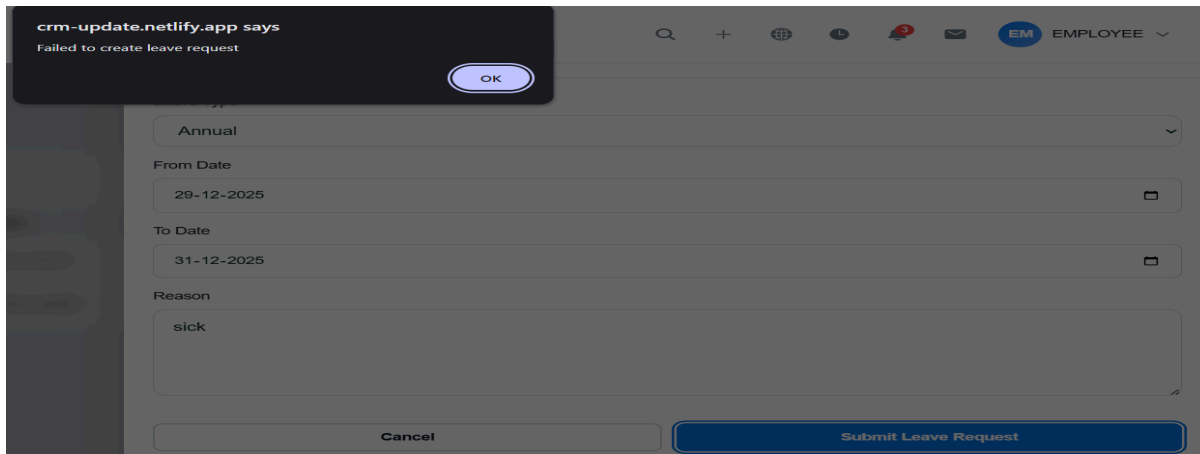
Employee Dashboard

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

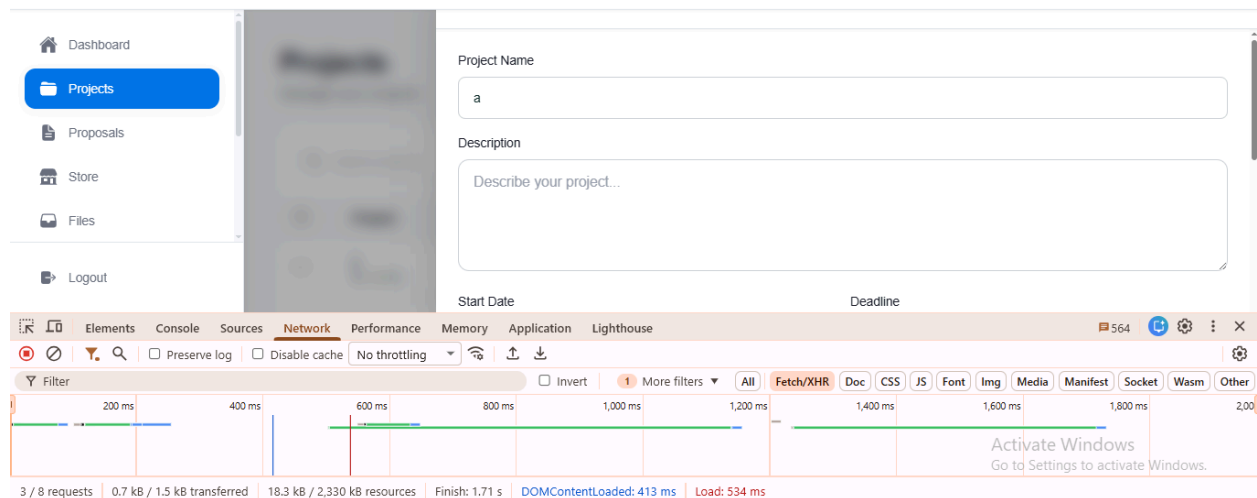
Impact / Severity:

Critical – Leave management feature is completely unusable for employees

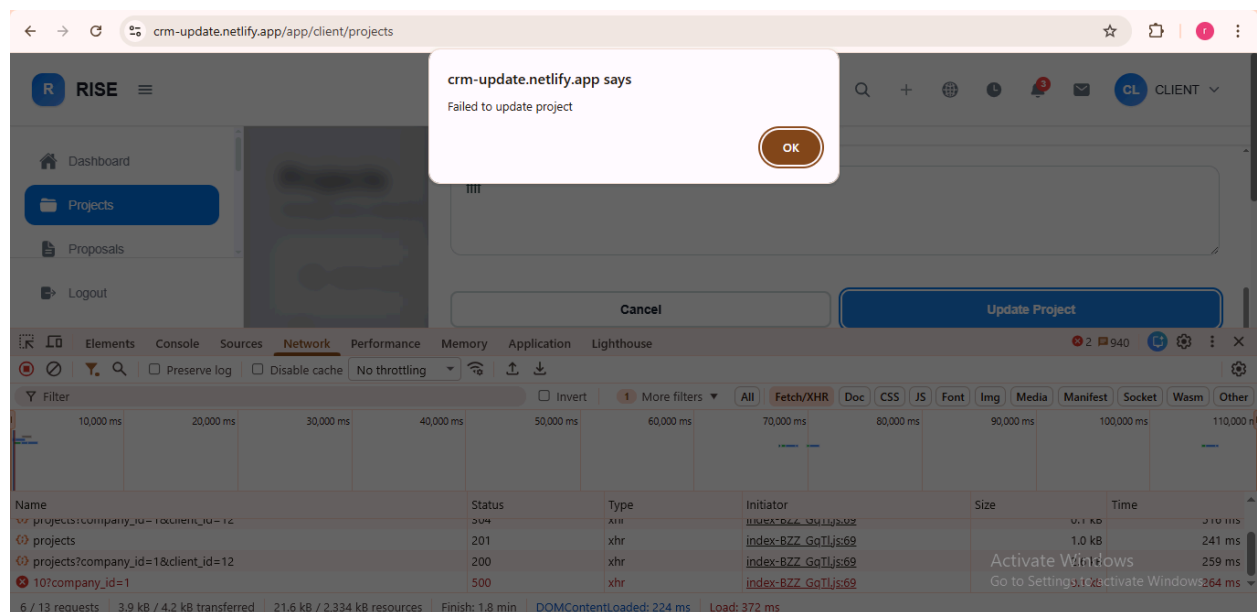
Possible Cause (Suggestion):

- 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

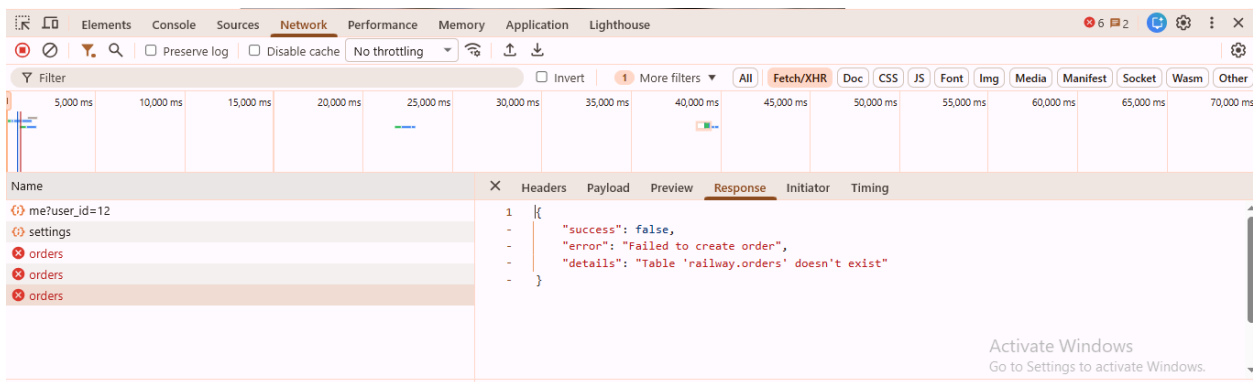
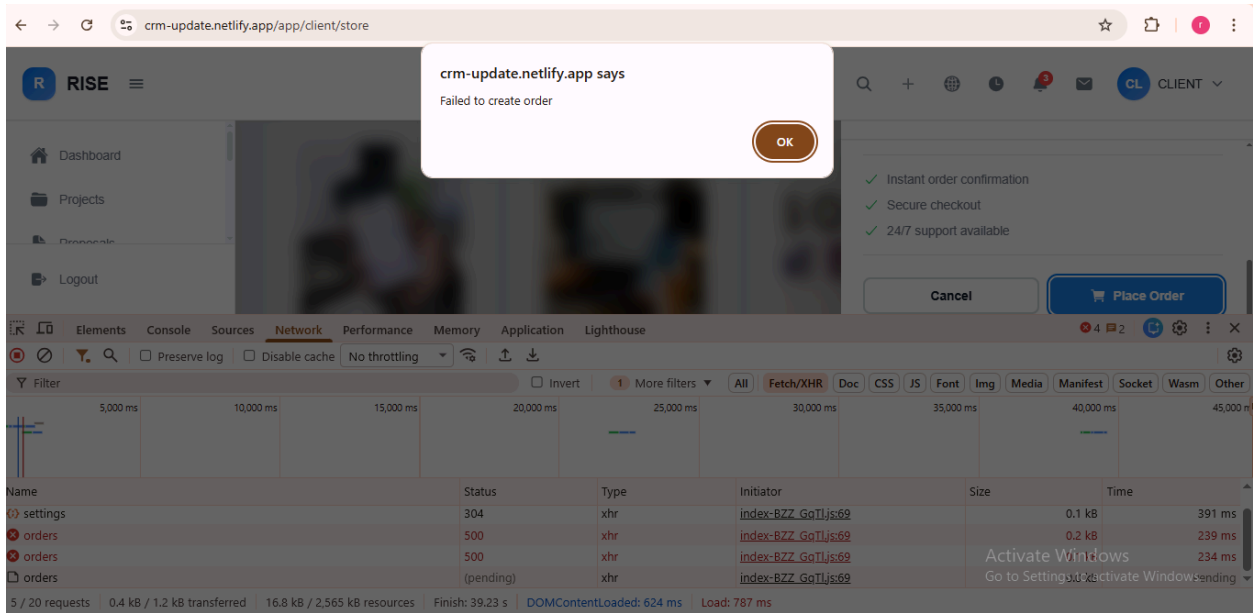
Client Dashboard



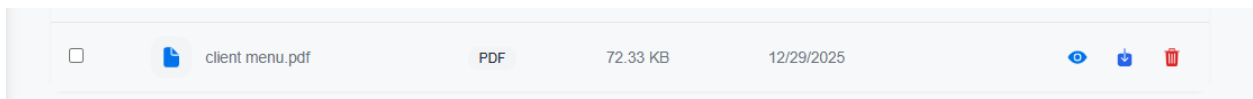
Client dashboard -> project menu -> when we create project input field take only one letter



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



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

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

RISE

Dashboard Logout

Subscriptions

View your active subscriptions

Elements Console Sources **Network** Performance Memory Application Lighthouse

Filter 100 ms 200 ms 300 ms 400 ms 500 ms 600 ms 700 ms 800 ms 900 ms 1,000 ms 1,100 ms 1,200 ms 1,300 ms 1,400 ms 1,500 ms 1,600 ms

Name X Headers Payload Preview **Response** Initiator Timing

settings
me?user_id=12
subscriptions?company_id=1&client_id=12

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

3 / 7 requests | 0.3 kB / 0.9 kB transferred | 16.6 kB / 2,328 kB resources | Finish: 1

Activate Windows
Go to Settings to activate Windows.

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

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

RISE

Dashboard Logout

Orders

View and manage your orders

+ Add order

Elements Console Sources **Network** Performance Memory Application Lighthouse

Filter 100 ms 200 ms 300 ms 400 ms 500 ms 600 ms 700 ms 800 ms 900 ms 1,000 ms 1,100 ms 1,200 ms 1,300 ms 1,400 ms 1,500 ms 1,600 ms

Name X Headers Payload Preview **Response** Initiator Timing

settings
me?user_id=12
invoices?company_id=1&client_id=12
orders?company_id=1&client_id=12

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

4 / 8 requests | 0.3 kB / 1.0 kB transferred | 16.6 kB / 2,328 kB resources | Finish: 1

Activate Windows
Go to Settings to activate Windows.

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

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

RISE

Dashboard Projects Proposals Store

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

OK

Elements Console Sources Network Performance Memory Application Lighthouse

Filter

2,000 ms 4,000 ms 6,000 ms 8,000 ms 10,000 ms 12,000 ms 14,000 ms 16,000 ms 18,000 ms 20,000 ms 22,000 ms

Name	Status	Type	Initiator	Size	Time
tickets?company_id=1&client_id=12	304	xhr	index-BZZ_GoTlJs69	0.0 kB	512 ms
settings	304	xhr	index-BZZ_GoTlJs69	0.0 kB	624 ms
me?user_id=12	304	xhr	index-BZZ_GoTlJs69	0.1 kB	477 ms
tickets	500	xhr	index-BZZ_GoTlJs69	0.1 kB	460 ms

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

Filter

5,000 ms 10,000 ms 15,000 ms 20,000 ms 25,000 ms 30,000 ms 35,000 ms 40,000 ms 45,000 ms 50,000 ms 55,000 ms

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						
tickets						

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