



Client Commitment

Sample Template Upload XLS

Excel

Sr. No

Project Name

Task Assigned

Task Details

Milestone

Milestone Target Date

Initial Target Date

CC Category

CRM

Overdue Days

Revised Completion Date

Close Date

Status

Attachment

Action

1

IT

John Doe, Jane Smith

Deploy new CRM module

From New Mile

2025-07-01

2025-06-20

Urgent

Neha Verma

5

2025-07-10

2025-07-12

Closed

View

Showing 1 to 1 of 1 entry

Overdue Commitment Nos. :
On Time Completion %: X %

Avg Delay Days X days.
Loss Due to Delay. X Rs.

DASH BOARD.
As per Filters Selected.

Print/Download

Hide/Unhide Columns

Search:

Status update

* All revised Data log should be store backend so that we can get the MIS score based on that
* As we update the 'status update' auto reminders to all stake holders

ok

Client Commitment

Sample Template

Upload XLS

Excel

Sr. No	Department	Task Assigned	Task Details	Milestone File	Milestone Target Date	Initial Target Date	Category	CRM	Overd
1	IT	John Doe, Jane Smith	Deploy new CRM module	<input type="button" value="View"/>	2025-07-01	2025-06-20	Urgent	Neha Verma	

Showing 1 to 1 of 1 entry

Add Client Commitment

~~Assign~~

Department* Task Assigned (Name)*

Select Department

Task Details*

Enter task details

Initial Target Date*

Select Date

Milestone Target Date

Select Date

~~Assigned Milestone File~~

Choose File

Category*

Select Category

CRM*

Select CRM

Revised Completion Date

Select Date

Close Date

Select Date

Status*

Select Status

Final Attachment*

Choose File

Remarks

Enter remarks

Save Cancel

OK

The tab found for a form as this tab will come from, By formula
→ Overdue → Should come auto as per project role.
→ CRM → Should come auto as per project role.
→ Revised Completion → Typo field for date.
→ Close date → Typo field for date.
→ Status → when close date is good it should auto close or else it should be open

Awaited Clearance From Client

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Excel

Sr.No.	Category	Brief Detail about Issue	Attached Milestone	Key Delay Events	Issue Open Since Date	overdue	Delay	Status	Doer	Attachment	Select Data To Share	Remark
1	Category A	Delay in procurement of raw materials	View	Yes	2025-05-10	45	Major	Open	Rahul Mehra	View	<input type="checkbox"/>	Escalated to management
2	Category B	Design revision not finalized	View	No	2025-04-28	58	Moderate	Close	Anjali Singh	View	<input type="checkbox"/>	Awaiting client response
3	Category C	Installation delayed due to site unavailability	View	Yes	2025-05-20	35	Minor	Closed	Sunil Patel	View	<input type="checkbox"/>	Work completed after handover

Showing 1 to 3 of 3 entries

+ Add Awaited Clearance From Client

Filter

Search:

Status update

Escalation

* Status update - auto generating to default status holders **OK**

* It should open in this view by "Add Awaited Clearance" it should open a window as below,

Window View

All Category	Priority	Affected Milestone	Brief details	Issue open since	Open	Attachment
(dropdown) v	(dropdown) v	(dropdown) v				

Plus button to add to add open

From Milestone Planning

Save

Send Whatsapp

Send Email

Save & Close

Awaited Clearance From Client

Sample Template Upload XLS Send Whatsapp Send Email

Excel									
Sr.No.	Category	Brief Detail about Issue	Attached Milestone	Key Delay Events	Issue Open Since Date	overdue	Delay	Status	
1	Category A	Delay in procurement of raw materials	<input type="button" value="View"/>	Yes	2025-05-10	45	Major	Open	
2	Category B	Design revision not finalized	<input type="button" value="View"/>	No	2025-04-28	58	Moderate	Close	
3	Category C	Installation delayed due to site unavailability	<input type="button" value="View"/>	Yes	2025-05-20	35	Minor	Closed	

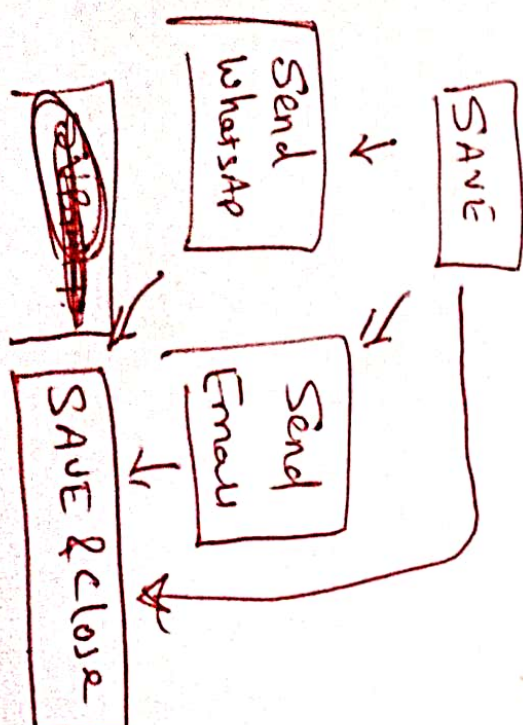
Showing 1 to 3 of 3 entries

Category	Priority	Affect milestone	Brief Detail	Issue Open Since	Doer	Attach m

Add + → plus button to add after

Add

Add



Add Awaited Clearance From Client

Affected Milestone

Category*

Select Category

Choose File No file chosen

Brief Detail about Issue*

Enter details

Key Delay Event

Select option

Overdue(days)

Enter overdue days

Status

By Defect

Attachment

Choose File No file chosen

Issue Open Since Date*

Select Date

Delay Time

Select

Doer

Select Doer

from Internal Directory.

Save Cancel

Priority.
Critical
High
Medium
Low

Add

SAVE

Submit

Send WhatsApp

Send Email

OK