User Manual – Imprint (Manager/Super Manager Portal)

This manual is a guide to understanding and using the **Imprint Manager Portal**, a comprehensive solution for tracking sales teams, managing fieldwork, analyzing performance, and generating reports to improve productivity and efficiency.

Asti's Imprint Manager Web Portal, a comprehensive solution for managing and monitoring your sales teams effectively. The Manager Portal empowers you to oversee field staff activities, track trips, manage timesheets, and analyze individual and team performance in real time. It is designed to enhance communication, productivity, and operational efficiency across your organization.

With a user-friendly interface, the portal allows managers to streamline workflows, make data-driven decisions, and generate detailed reports for future planning. The system ensures transparent collaboration between managers and field staff, fostering trust and improving overall performance.

You can access the Manager Web Portal using the link:

https://imprint.astiinfotech.com/

Logging into the Manager Portal in Imprint

1. Open the Manager Web Portal.
2. On the login page, enter the Username and Password provided by the Asti team or your company HR.
3. Click on the submit button
4. After a successful login, you will be redirected to the **Salesforce Management Dashboard**, where you can access all modules.

Dashboard Header in Imprint

The **Dashboard Header** provides quick access to various sections and settings of the portal. Here's a breakdown:

1. Menu Icon in imprint

• Clicking this icon minimizes or expands the left navigation bar.

2. Pie Chart Icon in imprint

Clicking this icon opens a dropdown with options to quickly switch between modules like:

- Dashboard
- Task Dashboard
- Lead Dashboard
- Order Dashboard
- Collection Dashboard
- Ticket Dashboard

3. Search Icon in imprint

• Type any module name in the search bar, click the suggestion, and you will be redirected directly to the module.

4. Dashboard Icons in imprint

• Clicking the respective icons (Dashboard, Task Dashboard, Lead Dashboard, Order Dashboard, Collection Dashboard, Ticket Dashboard) takes you to the corresponding dashboard.

5. Status Icon in imprint

• Click to view the status of downloads and documents. You can also download them directly from here.

6. What's New in imprint

• Click to view release notes and updates related to the software.

7. Notification Icon in imprint

• Displays all notifications, including login, logout, client visits, miscellaneous, forms, and daily status updates.

8. Profile Image in imprint

Hovering over your profile image shows options to:

- Logout
- Change Password

Dashboard Overview in Imprint

Upon landing on the **Salesforce Management Dashboard**, you'll be presented with various sections and metrics that help you track and manage your team effectively. Here's a breakdown of the key elements:

1. Working Status Map in imprint

The **Working Status Chart** gives a clear visual of how many employees are actively working throughout the day. It shows the number of employees working at different times, helping you easily track team activity and availability.

- The **X-axis** represents time & The **Y-axis** shows the number of employees working.
- By looking at the chart, you can quickly understand when most employees are active and identify any patterns or gaps in team availability. This helps you manage resources effectively and ensure that your team is working efficiently during peak times.

2. Total Reported Counts in imprint

This section shows the total number of **employees who are logged in** to the system based on the branch you have selected.

- You can click on the count to view detailed information about the active employees.
- Once clicked, it shows details based on the filters **Team**, **Branch**, **Role**. You'll also see a list of active employees with their **Profile Image**, **Employee ID**, **Name**, **Phone**, **Email**, and available **Actions** (e.g., Clicking **View Details** shows the employee's appointments and trips for the selected date, including titles, locations, times, and kilometers traveled.).

3. Total Working Counts in imprint

- This indicates the **total number of active field agents** currently working or logged in. It helps you monitor the availability of your team members and ensures that all agents are accounted for during their shifts.

4. Total Appointments Count in imprint

- This shows the **total number of appointments** scheduled for your team. It helps in tracking and planning for the day's activities, ensuring that your agents are well prepared for their tasks.

5. Total Pending Approvals Count in imprint

- This shows the number of pending or completed approvals. **On hover**, it displays counts for **Trips**, **Reimbursements**, and **Timesheets**.

6. Working Location in imprint

- This section allows the manager to track the current locations of agents or teams. By viewing the map, you can see where your workforce is located, helping with better coordination and resource management.
- When you click on the expand icon in the map, it expands to show more details. You can select an employee name to see their exact location. Additionally, by clicking the Add Appointment button, you can directly schedule an appointment for that agent.

7.Appointment Calendar in imprint

- The **Appointment Calendar** shows upcoming appointments directly on the dashboard. Clicking on an appointment redirects you to the appointment details page, making it easy to schedule and manage tasks.

8. Employee List in imprint

- The **Employee List** displays employees with their **Name**, **Battery**, **First Sign In**, **Last Sign Out**, and **Appointments** Details. You can click on an employee's name to view their complete details on a separate page.

Navigation Drawer (Left Side) in Imprint

Starting from the header at the top of the navigation drawer:

- Manager's Name
  - Reporting to -> Manager's name

These details will be displayed

Daily Activity in Imprint

The first module in the navigation drawer is **Daily Activity**. This includes 12 submodules, starting with:

1. To-Do List in imprint:

- The To-Do List module is an excellent tool for managing daily tasks and staying organized. It allows users to track tasks, add new ones, and make necessary edits or deletions. This feature provides flexibility and control over daily activities and should be highlighted in the user manual for its ease of use and practical functionality.

On the **To-Do** page, you can view all the tasks you've added to your to-do list. You can also add new tasks, as well as edit or delete existing ones.

2)Appointment in Imprint

- Appointments are used by managers to create and assign appointments with customers. Managers can schedule meetings, track upcoming appointments, and assign them to specific employees or teams. The system helps ensure that all appointments are properly organized, easily accessible, and aligned with the company’s scheduling needs.

- When you open the Appointment, you can view all the appointments you've added. The page includes filters and a calendar.

- To add a **new appointment**, click the plus icon, fill in the required details, and the appointment will be added to either your schedule or an employee's schedule.
- Once added, you can download all appointments in excel or pdf format.

3)Client visit in imprint

The **Client Visit** section provides a detailed log of all client visits made by employees via imprint mobile app. This page serves as a record of each interaction, ensuring that all essential visit information is easily accessible.

4)Job Planner in imprint

- The **Job Planner** section allows you to track job completions and add new jobs.
- Once the job is completed via the mobile app, the submitted details will be displayed in the Job Planner.
- To add a job, click the **plus icon** and fill in details such as Job Title, Priority, Date, Branch, Job Type, Employee Name, Customer Name, Scheduled Time, Location, and Job Description and click on the Add Button.

5) Document Repository in imprint

- The **Document Repository** section allows you to manage, upload and download documents. You can search for specific documents by entering the **Document Name**. Once uploaded, documents (including files, videos, and audios) are available for field agents and can be **downloaded** or **viewed**.
- You can view details such as **File Name**, **Version**, **Uploaded By**, and take actions like downloading, viewing, or deleting the document.

To add a document in imprint:

- Enter the **Document Name**.
- Click on **Upload File** and select a file (under 15MB).
- Click **OK** to add the document

6. Reportee Details in imprint

The **Reportee Details** section allows managers to view the details of all employees under their team.

- The **Reportee Details** section lets managers view all employees in their team with details such as **Team**, **Branch**, **Role**, **Employee ID**, **Employee Name**, **Phone Number**, and **Email**. The page also includes filters and a search option to easily find specific employees.

- By clicking on the Action button for any employee, managers can view their **Appointments for the Day** and **Trips for the Day**.

7. Calendar in imprint

- The **Calendar** section allows managers to utilize their time and set availability on the calendar by filling in the important working plan details.

8. Forms in imprint

- The **Forms** section allows managers to see all the custom forms created by HR

9. Forms History in imprint

- The **Form History** page displays all submitted form details, including Employee Name, Date, Time, Location (LatLng), Address, URL, Company, Amount, Quotation, and Signature URL. Users can also download the data in **Excel** or **PDF** format.
- The **Forms Dashboard** displays all the data in a graphical format, showing insights based on forms filled. The data is categorized by employee-wise, form-wise, and branch-wise views.

11. Device Details in imprint

- The **Device Details** section displays all devices added by HR. Managers can allocate a device to any employee by clicking on **Action** and selecting the employee.

12. My Team in imprint

- The **My Team** section allows managers to track employees' current location and view details like the Appointment, Timeline, Client visits, forms, leads, distance traveled, and login/logout times

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Communication in Imprint

This includes 4 sub-modules, starting with:

1. Meet VC in imprint:

- The **Meet VC** feature allows users to schedule and start virtual meetings.
- **Schedule a Meeting**: Fill in the required details and click **Save**.
- **Start a Meeting**: Select the scheduled meeting from the **Calendar** and click **Start Meeting**.

2. Bulletin Board in imprint:

- The **Bulletin Board** allows users to view notices published by HR.
- Managers can see all notices shared by HR.
- **Add a Notice**: Click **Add**, select the **Branch** and **Employee**, enter the notice details, and click **Add**. The notice will be sent to the selected employee(s).

3. Email Management in Imprint:

- The **Email Management** section allows users to **send** and **receive** emails directly from the system.

4. My Space in imprint:

- In this section, users can:
    - ✦ Click Generate URL to create a meeting link.
    - ✦ Copy the link to start or join a meeting.

✦ Click Connect My Space to join an ongoing meeting.

Customer in imprint

This includes 4 sub-modules, starting with:

1. Customer Information:

- The **Customer Information** page allows you to view all customers added by you. You can add new customers individually, bulk upload customer details, and export customer data.
- The page displays essential information such as Company, Customer Name, TID, Branch, Designation, Email, Telephone, and Mobile Number.

Note: To add a customer, follow this order: **Company** → **Branch** → **Customer**.

2. Company in imprint:

- The **Company** allows you to view company details efficiently.
- To add a company, go to the **Company** section and click on **Add Company**. Fill in the required details, including **Company Name, Address, Email, and Contact Information**. Once all details are entered, click **Add Company** to successfully add the company.

3. Branch in imprint:

- The **Branch** allows you to view branch details efficiently.
- Go to the **Branch** section and click on **Add Branch**. Select the **Company** under which the branch belongs, then fill in the required details such as **Branch Name, Address, Email, and Contact Information**. Once all details are entered, click **Add Branch** to successfully add the branch.

4. Branch Business Card Scanner in imprint:

- When employees scan and submit a visiting card, it will be visible here. This allows managers to easily view the scanned card details.

Task Management in imprint

This includes 2 sub-modules, starting with:

1. Task Management in imprint:

- **Task Management** allows managers to add tasks and assign them to employees. Once a task is completed, employees can edit, update, and submit the task.
- Managers can view all employees' tasks and efficiently manage them.
- Users can apply filters to refine task searches based on specific criteria, including:
  - **Date Range** – Select a custom date range.
  - **Branch** – Filter tasks by branch.
  - **Employee** – View tasks assigned to a specific employee.

- **Progress Status** – Filter tasks by status: Delayed, On Time, Completed, or Unassigned.
- **Search Bar** – Quickly find tasks using keywords.

- **Task Categories**:
  - **Raised by Me** – Tasks created by the user.
  - **Assigned by Me** – Tasks assigned to others by the user. ○ **Assigned to Me** – Tasks assigned to the user. ○ **Unassigned** – Tasks without an assigned employee. ○ **Teams** – View team-based tasks.
  - **Old Default** – **Previously set default tasks.**

Add a Task in Imprint

To create a new task in imprint, fill in the required details:

1. **Project Name** – Select the project the task belongs to.
2. **Category** – Choose the task category.
3. **Task Name** – Enter a descriptive task title.
4. **Task Description** – Provide details about the task.
5. **Priority** – Select the task priority.
6. **Assigned To** – Choose the employee responsible for the task.
7. **Assigned By** – Select the manager assigning the task.
8. **Assigned Date** – Set the date the task is assigned.
9. **Expected Closure Date** – Specify the deadline for task completion.
10. **Progress Status** – Update the current task status.
11. **Progress %** – Indicate the completion percentage (0-100%).
12. **Comments** – Add any relevant comments.
13. **File Upload** – Attach files if needed.

Once all details are filled in, **save the task** to assign it successfully.

2. Task Dashboard in Imprint:

- The **Task Management Dashboard** provides an overview of task progress, status, and distribution across employees and projects.

Lead & Order Management in Imprint

This includes 3 sub-modules, starting with:

1. Lead Management in imprint:

1.1 Lead Dashboard in imprint

- The **Lead Dashboard** visually represents lead activities within a selected date range. Users can filter data by Start Date, End Date, and Branch to generate specific reports.

1.2 Add/Create Lead in imprint

- To add a new lead, fill in the required details:
- **Company & Branch Details** – Select the company and branch.
- **Point of Contact** – Enter the lead's name, email, and phone number.
- **Lead Status** – Choose the current status of the lead. Once all details are entered, click **Add Lead** to save it.

1.3 View Leads in imprint

- Managers can view all leads on the **calendar**, track lead follow-ups, and check the status of each lead.
- Managers can **add watchers** to monitor lead progress, view **My Lead** for assigned leads, and **archive leads** to store inactive or completed ones.

1.4 Lead Bulk Upload in imprint

- Download the sample file from here, fill in the required details, and upload it. Once processed, the leads will be added in bulk.

1.5 Email Template Configuration in imprint

- Allows you to create and save email templates for Leads, making it easier to send consistent and professional emails.

2. Order Management in Imprint:

2.1 Add/Create Order in imprint

- In this section, managers can enter all necessary details to create a new order. The system allows for inputting customer information, product details, quantity, pricing, and any additional notes. Once all required fields are filled, users can submit the order for processing. This feature ensures accurate order management and helps streamline the purchasing workflow.

2.2 Order Details in imprint

- In this section, managers can view all submitted orders. Managers can track the orders, while managers have the authority to update the order status to "Paid" or cancel it if necessary. This feature ensures transparency in order management and allows for efficient processing of payments and cancellations.

2.3 Order Dashboard in imprint

- The Order Dashboard in the Manager Portal provides a comprehensive visual representation of all order-related data through interactive graphs and charts. Managers can easily track order trends, monitor payments, and analyze overall sales performance.

Collection management in imprint

3.1 Add/Create Collection in imprint

- Managers can create new collections by filling in all the required details. This feature allows for organizing products or orders into specific categories, making it easier to manage and track them efficiently. Once the details are provided, the collection can be saved and used for streamlined Collection management.

3.2 Collection Details in imprint

- In this section, managers can view all collections made by employees.
  - Assign Collection Job in imprint
  - managers can assign a collection task to a specific employee from this section. This ensures that the right personnel handle the collection process efficiently. Managers can select the employee, provide necessary details, and track the assigned collection to ensure timely completion.

3 Collection Dashboard in imprint

- The Collection Dashboard provides managers with a visual overview of all collection activities through interactive graphs and charts. It helps track submitted and received collections, monitor employee performance, and analyze collection trends. This feature enables efficient financial management by offering real-time insights into collection statuses.

Campaign Management in imprint

This includes 5 sub-modules, starting with:

1. Campaign Dashboard in imprint:

- The Campaign Dashboard provides a visual overview of all marketing and promotional campaigns. Managers can track campaign performance, analyze engagement metrics, and monitor the success of different marketing efforts.

2. View Campaign in imprint:

- In this section, managers can access a detailed list of all ongoing and past campaigns. They can review campaign details, track performance metrics, and analyze engagement levels. This feature helps in evaluating the effectiveness of marketing efforts and making informed decisions for future campaigns.

3. Add Campaign in Imprint:

- In Managers can create a new campaign in imprint by entering the required details:
  - **Select/Add Batch** – Choose or create a batch. ○ **Campaign Name** – Enter the campaign title.

- **Date** – Set the campaign date. ○ **Type of Campaign** – Select the category. ○ **Product** – Mention the associated product.
- **Cost** – Enter the campaign budget.
- **Goals** – Define objectives (max 200 characters). ○ **Comments** – Add notes (max 200 characters).
- **Campaign Location** – Specify the location.

Once saved, the campaign can be tracked for performance.

4. View/Add Prospects in Imprint:

- Managers can view and manage prospects in imprint in different categories: ○ **All Prospects** – View all available prospects. ○ **External Prospects** – Track prospects from external sources.
  - **Deleted Prospects** – Access removed prospects if needed.

After creating a prospect, it can be converted into a **lead** for further follow-up.

LinkedIn Prospect in imprint

- Managers can add prospects from LinkedIn by following these steps:
  - Click the button to go to the LinkedIn Data Download page. ○ Sign in to LinkedIn if prompted.
  - Select the "Messages" checkbox and click "Request archive." ○ Wait for the confirmation email, then download the ZIP file. ○ Unzip the file and upload it here.
  - Click "Convert to Prospect," select the required prospects, choose the campaign and LinkedIn profile name, then upload.

Target in Imprint

This includes 4 sub-modules, starting with:

1. Target in imprint:

Target: - A target is a goal set for employees or branches to track their progress and success. It is often linked to earning incentives. The "Target & Incentives" module lets HR or managers add and manage these targets in the HR or Manager portal.
Adding a Target via the HR or Manager Portal:

1. Login to Portal:
    - Access the relevant portal using your credentials.
2. Navigate to '**Add Target**:

- Click on "**Target**," then select "**Target**." Click on the "**Add Target**" plus icon to create a new target.

3. Fill in Target Details:

- **Title**: Enter the title of the target.
- **Branch Selection**: Choose the branch from the dropdown menu. If "All Branches" is selected, the target will apply to all branches.
- **Target Type:** Select the type of target, such as Revenue or Subscription.
- **Priority:** Choose the priority level from the dropdown menu.
- **Start and End Date:** Set the start and end dates for the target.
- **Evaluation Type:** Select how frequently the target will be evaluated (Daily, Weekly, Monthly) from the dropdown.
- **Evaluation Period:** Enter the evaluation period (e.g., every 30 days).
- **Evaluation Lock Period Type:** Choose the lock period type (Daily, Weekly, Monthly) from the dropdown.
- **Evaluation Lock-In Period:** Enter the duration of the evaluation lock-in period.
- **Intimation Before End Value:** Enter the value for notification before the target period ends.
- **Intimation Type:** Choose the frequency of notifications (Daily or Hourly) from the dropdown.
- **Comments:** Add any additional comments or notes.

4. **Click on 'Add Target':**

- Once all the details are filled in, click the "Add Target" button to save and create the target.

5. **Open Target Information Page:**

- After adding the target, click on the “Eye icon” next to the added target in the list to open the target information page, where you can view or edit the target details and etc.

2. Target Performance in imprint:

All target performances are displayed here, allowing both employees and managers to view the performance in their respective portals.

To View Target Performance in imprint**:**

1. Login to the Portal:

- After logging in, go to the "Target" module.

2. Select Target Performance:

- Click on "Target Performance."

3. Apply Filters:

- Use filters such as branch and employee. If you're a manager, you can view performance by manager or employee.

4. View Target Status:

- You can also see the status of the target as a percentage.

3. Transaction Bulk Upload in Imprint:

Bulk Upload Transaction Submission in imprint**:**

1. **Prepare the Excel File:**
    - Go to the Target module, select "Transaction Bulk Upload," and click on "Download Sample" to get the Excel template. Fill in the details like Employee Name, Manager Name, Employee Code, Transaction Start Date and End Date, Transaction Value, Transaction Type, and Product Name.

2. **Save the File:**
   Save the filled Excel file.
3. **Upload the File:**
    - Return to the Transaction Bulk Upload Page.
    - Click on "Upload File."
    - Select the branch and target name.
    - Choose the recently filled Excel file.
4. **Submit Bulk Upload:**

• Click on the "Upload File" button. The transactions will be submitted in bulk.

4. Target Custom Summary in Imprint:

• The **Target Custom Summary** provides an overview of employee targets, achievements, and performance. It displays data for a selected date range, branch, and employee. Managers can track custom targets, compare achieved targets, and analyze performance percentages to assess progress effectively.

Tickets & Support in Imprint

This includes 3 sub-modules, starting with:

1. Tickets Dashboard in imprint:

• The **Tickets Dashboard** provides an overview of all service tickets, including open, closed, problematic, revisit, and pending tickets. It tracks total installations, de-installations, services, and churn visits. Managers can monitor employee ticket summaries to assess workload and resolution efficiency.

2. Tickets in Imprint :

• Managers can create a **new ticket** by filling in the required details, including ticket number, reporting type, priority, and ticket type. Customer and bank details such as name, address, city, state, and contact information must be entered. Additional fields include service enrollment details, merchant reference ID, device serial numbers, item codes, and ticket status. Dates for ticket creation and POA can be selected, along with SIM details if applicable. Once submitted, the ticket is logged for tracking and resolution.

3. Tickets Bulk Upload in Imprint:

• Managers can upload multiple tickets at once using a bulk upload feature.

Payroll in Imprint

This includes 4 sub-modules, starting with:

1. Timesheet In Imprint:

- The **Timesheet** provides a detailed log of employee attendance, including holidays, week-offs, working days, leaves, and absences. Managers can filter records by date, branch, role, or employee. It also tracks login/logout times, working hours, client visits, and geofencing details for better workforce management.

Leave in imprint

2.1 Apply leave in imprint

- The system tracks leave balances for effective management.
- Managers and employees can apply for leave, restricted holidays, or leave cancellations. They can select the branch, specify start and end dates, and choose the leave type. A reason must be provided, along with selecting the approving manager. Attachments can be added if needed. Managers can also apply for leave on behalf of employees.

2.2 Review leave in imprint

- Managers can review all applied leaves, including restricted holidays. They have the authority to approve or cancel leave requests based on company policies.
- The system provides a detailed view of leave applications, including employee details, leave type, and application dates for better decision-making.

2.3 **Leave** Summary in imprint

- The **Leave Summary** provides a calendar view of all applied leaves. Managers can easily track employee leaves for a selected branch and month, helping with workforce planning and scheduling.

2.4 Regularization in imprint

- Managers can review and approve or reject regularization requests submitted by employees. These requests include corrections for attendance, working hours, or missed check-ins. The system provides a detailed view of applied regularizations, including employee name, date, and time range, ensuring accurate attendance tracking.

Reimbursement in Imprint

- The **Reimbursement** section in imprint allows employees to submit expense claims for approvals, including travel, fuel, food, and other allowances. Managers can review and process requests, track statuses (Submitted, Approved, Rejected, or Processed), and add comments for transparency. The system ensures smooth expense management and reimbursement tracking.

4. Trip History in imprint

- The **Trip History** section records employee travel details, including start and end dates, source, destination, and distance traveled.
- Managers can track trips, view detailed logs, and monitor travel activity for better expense and logistics management.

Settings in imprint

This includes 5 sub-modules, starting with:

1. Job Type in imprint:

- Managers can create jobs submitted from employees, allowing multiple forms to be included within the same job. They need to select the branch, specify the job type, provide a job description, and choose relevant forms from a list. This helps in organizing tasks efficiently and ensuring all required information is collected for the job.

2. Timeline in imprint:

- Managers can view and track employee activities by selecting the branch and employee. Activities include GPS tracking, internet connectivity status, mode sync, trip logs, logout times, and other relevant actions. This helps monitor work progress and ensure efficiency.

3. Configuration in imprint:

- Managers can update configuration settings such as GPS tracking intervals, user activity monitoring, and client selection radius. The client selection radius determines the range within which nearby customers will be displayed when employees conduct client visits.

4. DMS Configuration in imprint:

- Managers can control document access by enabling or disabling permissions for employees. They can search for specific employees and set which documents can be viewed within the system.

Report & Analysis in imprint

This includes 16 sub-modules, starting with:

1. Report in imprint:

- This section provides detailed records of employee activities within a specified date range. It includes employee sign-in and sign-out times, locations, geofence images, and other relevant data for tracking attendance and movement.

2. App Details in imprint

- This section provides information on employees' devices, including the device model, IMEI number, OS version, battery level, power saver mode status, and the installed app version. Managers can use this data to track device usage, ensure app updates, and monitor battery levels for optimal performance.

3. Daily Location in imprint:

- This section provides real-time tracking of employee movement based on their current location. The system categorizes travel modes into:
    - **Walk**
    - **Running**
    - **Halt**
- All movements are visually represented on a **map**, allowing managers to monitor employee travel patterns throughout the day.

Submission in imprint

- This section shows forms submitted by employees. You can filter by branch, form type, or employee and export the data. It includes details like submission time, location, and attached files.

5. Daily Activity Summary in imprint:

- The **Daily Activity Summary** provides an overview of employee activities, including the total number of appointments, distance traveled (in KM), and reimbursement claims. You can filter by date, branch, and role, and view detailed reports for each employee.

6.Export Jobs in imprint

- The **Export Jobs** feature allows users to generate and download job-related data in an Excel file, including details like **First Name, Last Name, Address, URL, Checkbox, and Text Area**. Users can filter data by **date, branch, and employee** before exporting. The exported data can also be viewed within the system for quick access and record-keeping.

7. Task Report in imprint:

- The **Task Report** feature provides a detailed overview of tasks assigned to employees within a specified **date range, branch, and employee selection**. It helps track task progress, completion status, and overall productivity, ensuring efficient task management and reporting.

8. Lead Report in imprint:

- The **Lead Report** feature allows managers to track and analyze lead data within a specified **date range, branch, and employee selection**. It provides insights into lead status, progress, and conversions, helping businesses optimize their sales and follow-up strategies.

9. Active Mode in imprint:

- The **Active Mode** feature tracks employee movements in real-time by capturing location details at a specified frequency, such as **every 10 seconds**. This helps monitor field activities, optimize routes, and ensure efficient workforce management.

10. Expense Report in imprint:

- The **Expense Report** section allows employees and managers to track expenses over a selected date range. Users can filter by **branch** and **role** to view submitted, approved, or processed expenses, ensuring transparency and efficient financial management

11. Overall Expense Report:

- **Overall Expense Report** provides a consolidated view of all expenses within the selected date range. Users can filter by **branch** and **role** to analyze total spending, approvals, and reimbursements for better financial oversight.

12. Appointment Report:

- The **Appointment Reports** section provides insights into sales executives' visits within the selected date range. It tracks the **total planned visits**, **completed visits**, **pending visits**, and **adhoc/random visits**, along with the **target achievement percentage** to measure performance and efficiency.

13. Target Report:

- **Target Report** provides a detailed analysis of employee performance based on assigned targets. It includes information such as **title, product name, type, subscription details, revenue generated, start and end dates, evaluation period, evaluation type, level, and comments**. This report helps track progress and assess goal achievement within the selected date range.

14. Target Summary Report:

- The **Trip Summary Report** provides an overview of employee trips within the selected date range. It includes details such as **Employee ID, Employee Name, Start and End Dates, Manager Name, Total Working Hours, and Total Distance Traveled**. This report helps track travel activities, work hours, and trip efficiency for better management and analysis

15. Auto Login Report:

- **Auto Login Report** tracks employees who have logged in automatically within the selected date range. It includes details such as branch, employee name, and login timestamps. This report helps monitor login activities, ensuring compliance with company policies and identifying any irregularities in login behavior.

- The **API Logs** report provides a summary of all API calls made within a selected date range. It includes details such as **service type, module name, total API calls, and their status (success, failed, or rejected)**. This report helps track system performance, troubleshoot issues, and ensure seamless integration between different services.

Notification Details in imprint

- This section displays notifications for various activities within a specified date range. Managers can track form submissions, login and logout records, client visits, daily status updates, and other miscellaneous activities.

Chat module in imprint

- The chat functionality in imprint allows employees and managers to communicate in real-time via their Imprint portals. This feature has been released for the web portal, with the app release still pending. It enhances team collaboration and supports quick communication between employees and managers.

Steps to Use the Chat Functionality in imprint:

1. Log in to the Imprint portal. click on the chat icon in the bottom right corner of the screen.

2. A list of all contacts, including employees and managers, will appear.

3. Click on the contact you wish to chat with. A new chat tab will open on the left side of the screen.
4. Type your message and click Send. The message will be delivered to the selected contact.

Once your message is delivered, if the recipient replies, you will receive their message back in the screen