Lumves CRM

Complete User Guide & Technical Documentation

Version 1.0.0 | December 2024

Sales Management System

Lead Tracking | Customer Management | Order Processing

Support: support@gautamjain2026.com

GitHub: github.com/verifiedjobs2/lumvescrm

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1. Introduction

Lumves CRM is a comprehensive Customer Relationship Management system designed specifically for sales teams. It provides a centralized platform to manage leads, track customer interactions, process orders, and generate insightful reports.

Key Features

- **Lead Management:** Track and nurture potential customers through the sales pipeline
- **Customer Database:** Maintain detailed records of all customers
- **Call Tracking:** Log and monitor all customer calls
- **Order Processing:** Create and manage customer orders
- **Follow-up System:** Schedule and track follow-up activities
- **Product Catalog:** Manage your product inventory
- **Reports & Analytics:** Generate insights from sales data
- **Role-based Access:** Admin, Manager, and Agent roles with different permissions

2. Getting Started

2.1 Accessing the Application

Application URL:
`https://client-chi-jade-53.vercel.app`

Open your web browser (Chrome, Firefox, Edge, or Safari recommended) and navigate to the application URL. You will be presented with the login screen.

2.2 Login Process

To login to the application:

1. Enter your **Email Address** in the email field
2. Enter your **Password** in the password field
3. Click the **"Sign In"** button
4. Upon successful authentication, you will be redirected to the Dashboard

Login Screen

The login page features:

- Lumves CRM branding at the top

- Email input field

- Password input field

- Sign In button

- Demo credentials section

2.3 User Roles

Role	Description	Access Level
Admin	System administrator with full access	All features + User Management
Manager	Team manager overseeing agents	All features except User Management
Agent	Sales representative	Basic CRM features (own data only)

3. Application Features

3.1 Dashboard

The Dashboard provides an overview of your sales metrics and key performance indicators. Different roles see different dashboards:

Admin Dashboard

- Total system users and activity
- Overall revenue metrics
- System-wide statistics

Manager Dashboard

- Team performance metrics
- Top performing agents
- Conversion rates
- Monthly revenue tracking

Agent Dashboard

- Personal performance stats
- Today's tasks and follow-ups
- Recent calls and activities

3.2 Customer Management

Navigate to **Customers** from the sidebar to access customer management.

Features:

- **View Customers:** Browse all customers in a searchable table
- **Add Customer:** Create new customer records with contact details
- **Edit Customer:** Update existing customer information

- **Customer History:** View interaction history and orders

3.3 Lead Management

The **Leads** section helps you track potential customers through the sales pipeline.

Lead Stages:

1. **New:** Fresh lead, not yet contacted
2. **Contacted:** Initial contact made
3. **Qualified:** Lead shows genuine interest
4. **Proposal:** Proposal sent to lead
5. **Negotiation:** In negotiation phase
6. **Won/Lost:** Final outcome

3.4 Call Tracking

Track all customer and lead calls in the **Calls** section.

Call Types:

- Inbound calls
- Outbound calls
- Follow-up calls
- Support calls

3.5 Order Management

Create and track orders in the **Orders** section.

Order Workflow:

1. Create new order
2. Add products and quantities
3. Set pricing and discounts
4. Process order
5. Track delivery status

3.6 Follow-ups

Schedule and manage follow-up activities to ensure no lead falls through the cracks.

Follow-up Features:

- Schedule follow-up date and time
- Set priority levels
- Add notes and reminders
- Mark as completed

3.7 Products

Manage your product catalog including:

- Product name and SKU
- Categories (Smartphones, Laptops, TVs, Kitchen Appliances, etc.)
- Pricing information
- Stock quantities

3.8 Reports

Generate insights from your sales data:

- Sales reports
- Lead conversion analytics
- Agent performance reports
- Revenue trends

3.9 User Management (Admin Only)

Administrators can manage system users:

- Create new user accounts
- Assign roles (Admin, Manager, Agent)
- Activate/deactivate users
- Reset passwords

4. Technology Stack

Frontend

React + TypeScript

Modern JavaScript library for building user interfaces with type safety.

- **React 18:** Component-based UI library
- **TypeScript:** Static type checking
- **React Router:** Client-side routing
- **Tailwind CSS:** Utility-first CSS framework
- **Axios:** HTTP client for API calls
- **Recharts:** Data visualization
- **Vite:** Fast build tool

Backend

Node.js + Express

Server-side JavaScript runtime with Express web framework.

- **Node.js:** JavaScript runtime
- **Express.js:** Web application framework
- **Sequelize:** ORM for database operations
- **JWT:** JSON Web Tokens for authentication
- **bcrypt:** Password hashing
- **Helmet:** Security headers
- **CORS:** Cross-origin resource sharing

Database

PostgreSQL (Supabase)

Powerful, open-source relational database hosted on Supabase.

- **PostgreSQL:** Relational database
- **Supabase:** Database hosting platform
- **Connection Pooling:** Efficient connection management
- **SSL Encryption:** Secure data transmission

5. Infrastructure & Hosting

Production URLs

Service	URL	Platform
Frontend	`https://client-chi-jade-53.vercel.app`	Vercel
Backend API	`https://lumves-crm-api.onrender.com`	Render
Database	Supabase PostgreSQL	Supabase

Vercel (Frontend Hosting)

Accessing Vercel Dashboard

1. Go to `https://vercel.com`
2. Login with your GitHub account
3. Select the "client" project
4. View deployments, logs, and settings

Key Features:

- Automatic deployments on git push
- Environment variables management
- Custom domain support
- Analytics and performance monitoring

Render (Backend Hosting)

Accessing Render Dashboard

1. Go to `https://render.com`
2. Login with your account
3. Select "lumves-crm-api" service
4. View logs, environment variables, and settings

Key Features:

- Automatic deployments from GitHub
- Environment variables management
- Service logs and monitoring
- Manual deploy trigger

> **Note:** Free tier services spin down after 15 minutes of inactivity. First request after sleep takes ~30 seconds.

Supabase (Database)

Accessing Supabase Dashboard

1. Go to `https://supabase.com`
2. Login with your account
3. Select your project
4. Access Table Editor, SQL Editor, and Settings

Key Features:

- Table Editor for data management
- SQL Editor for custom queries
- Database backups
- Connection string management

6. Admin Access & Credentials

Security Warning: Change all default passwords immediately after first login. Store credentials securely and never share them publicly.

Application Login

Admin Account

URL	`https://client-chi-jade-53.vercel.app`
Email	`admin@lumves.com`
Password	`admin123`

Platform Access

Vercel

Login via GitHub OAuth at `https://vercel.com`

Render

Login at `https://render.com` with your registered account

Supabase

Login at `https://supabase.com` with your registered account

GitHub Repository

Repository: `https://github.com/verifiedjobs2/lumvescrm`

7. Scaling Guide

As your business grows, you may need to scale the application. Here's how to upgrade each component:

7.1 Frontend Scaling (Vercel)

Current: Free Tier

Upgrade Path:

1. **Pro Plan ($20/month):** More bandwidth, team features
2. **Enterprise:** Custom pricing for large organizations

When to Upgrade:

- Exceeding 100GB bandwidth/month
- Need custom domains with SSL
- Require team collaboration features

7.2 Backend Scaling (Render)

Current: Free Tier

Upgrade Path:

1. **Starter ($7/month):** No sleep, more RAM
2. **Standard ($25/month):** 2GB RAM, better CPU
3. **Pro ($85/month):** 4GB RAM, dedicated resources

When to Upgrade:

- Service sleeping is unacceptable
- Need more concurrent connections

- Require faster response times

7.3 Database Scaling (Supabase)

Current: Free Tier

Upgrade Path:

1. **Pro ($25/month):** 8GB database, daily backups
2. **Team ($599/month):** Larger storage, priority support
3. **Enterprise:** Custom scaling, SLA

When to Upgrade:

- Database exceeding 500MB
- Need point-in-time recovery
- Require more concurrent connections

7.4 Advanced Scaling Options

Horizontal Scaling

- Deploy multiple backend instances
- Use load balancer (included in Render paid plans)
- Implement Redis for session management

Database Optimization

- Add database indexes for frequently queried columns
- Implement query caching
- Consider read replicas for heavy read workloads

CDN & Caching

- Vercel automatically provides global CDN

- Implement API response caching
- Use service workers for offline support

8. Troubleshooting

Common Issues

Issue: Login fails with "Network Error"

> **Cause:** Backend service may be sleeping (free tier)
>
> **Solution:** Wait 30 seconds and try again. The first request wakes up the service.

Issue: Page shows blank after login

> **Cause:** Browser cache or session issue
>
> **Solution:** Clear browser cache and cookies, then try again.

Issue: "Internal Server Error" on API calls

> **Cause:** Database connection issue
>
> **Solution:** Check Render logs for detailed error. May need to restart service.

Issue: Changes not reflecting after deployment

> **Cause:** Browser caching old version
>
> **Solution:** Hard refresh (Ctrl+Shift+R) or clear cache.

Checking Service Health

Backend Health Check

Visit: `https://lumves-crm-api.onrender.com/api/health`

Should return: `{"status": "ok", "timestamp": "..."}`

View Logs

- **Backend Logs:** Render Dashboard → Service → Logs
- **Frontend Logs:** Browser Developer Tools (F12) → Console

9. Support

Need Help?

Contact our support team:

support@gautamjain2026.com

Support Channels

Channel	Contact	Response Time
Email Support	support@gautamjain2026.com	24-48 hours
GitHub Issues	GitHub Repository	Varies

When Contacting Support

Please include the following information:

- Description of the issue
- Steps to reproduce
- Browser and operating system
- Screenshots (if applicable)
- Error messages (if any)

Resources

- **GitHub Repository:** github.com/verifiedjobs2/lumvescrm

- **Vercel Documentation:** vercel.com/docs
- **Render Documentation:** render.com/docs
- **Supabase Documentation:** supabase.com/docs

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