**Customer Management System (CRM)**

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| **Modeles** | **Details** | **Estimated Time** |
| **Client Management** | 1. Manage Client Type (CRUD)  * Input Field (Client type, Client Type Note, status, …)  1. Manage Client Interest (CRUD)  * Input Field (Interest Topic, Topic Details, status, …)  1. Manage Client Priority (CRUD)  * Input Field (priority name, priority note, status, …)  1. Manage Client (CRUD)  * Input Field (name, email, address, contract, client type, client interest, client priority, gender ,Refer by, status, …) * Client should be two type (client as Organization and client as person) * Import Client as Excel file. * Client Filter by added date, priority, client type, client interest | **3 Days** |
| **Comment** | 1. Create Comment On Client (CRUD)  * Input Field (client name, comment, comment details …) * Create Comment page show previous comment on specific client. * Comment show in as a list as well as client details page * When create show all previous comments | **1 Days** |
| **Reminder** | 1. Create Reminder On Client (CRUD)  * Input Field (client name, reminder topic, time, date, details …) * Incoming 10 days reminder show in dashboard top menu. * Reminder show in as a list as well as client details page | **1 days** |
| **Employee Management** | 1. Manage Department (CRUD)  * Input Field (department name, department description, status, …)  1. Manage Designation (CRUD)  * Input Field (Designation, Department, Description, status, …)  1. Manage Employee (CRUD)  * Input Field (Employee ID, name, present address, Permanent address, fathers name, mothers name, NID number, email, phone number, emergency contract, designation, department, joining date, date of birth, joining designation, gender, academic qualification, experience, material status, references, status, …) | **2 Days** |
| **Manage Reference** | 1. Manage Reference (CRUD)  * Input Field(Reference Name, email, contract number, address, date of birth, gender) * Reference can implemented when job create and client add. | **1 Days** |
| **Job Management** | 1. Manage Job Type(CRUD)  * Input field(Type, description, status)  1. Manage Job (CRUD)  * Input Field (job name/account name, job type, job receiving date, client name, assign to, status, job description).  1. Job Note (CRUD)  * Input field(note title, note, status)  1. Job Payment (CRUD)  * Input field (Job name/account name, payable amount, discount, tax, tax method, payment note)  1. Discount Payment (CRUD)  * Input field (Job name/account name, Discount amount, short note)  1. Installment Payment (CRUD)  * Input field (Job name/account name, installment name, amount, method, short note)  1. Next Payment Days (CRUD)  * Input field (Job name/account name, next payment days, short note)  1. Payable Report on specific job 2. Discount Report on specific job 3. Installment Report on specific job | **7 days** |
| **Expense Management** | 1. Expense Type (CRUD)  * Input field (type name, details, status, ..)  1. Add Expense (CRUD)  * Input Field (Expense type, expense amount, details, account, status,) * Expense can be filter by expense type/category. | **1 Days** |
| **Report** | 1. Client Report  * Which employee creates how many clients  1. Job Report  * Date wise report, Employee wise report.  1. Account Report  * Date wise account statement.  1. Comment Report  * Date wise comment report * Client wise comment report  1. Reminder Report 2. Date wise and client wise reminder report | **5 Days** |
| **Settings** | 1. User profile setting  * Input field (First name , last name, email, Contract, present address, permanent address, photo, gender)  1. General Setting  * Input field(System name, system logo, Developed By,prefix,currency) | **1 days** |
|  | \*Every Menu should be maintained by Role and Permission\*  \*Every Report, List page, single page should be printable and generate PDF\* | **3 Days** |
|  | **Finally Estimated Time** | **22-25 Days** |