

Work Scope – Crm

Frontend

Invoice

- Set invoice module
 - Create invoice **client-wise**
 - Invoice list mapped with client data
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Client Invoice List

- Client-wise invoice listing page
 - View / edit invoice details
 - Basic sorting and actions
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UI (Materials)

- Implement UI for **Materials page**
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Integration

- Frontend ↔ backend API integration
 - Handle create, update, list, view flows
 - Manage loaders, errors, and edge cases
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Filters

- Separate filters for each module
 - Invoice filters (client, status, date, etc.)
 - Ensure module-level filter isolation
 - Page-wise functionality linking
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Notifications & Reminders

- Invoice due date reminders
 - Payment pending notifications
 - System notifications (basic level)
 - Notification trigger logic & UI
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Profile Settings

- User profile view & edit
 - Update basic account details
 - Change password / preferences (if applicable)
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Package Upgrade

- Upgrade package / plan functionality
 - Restrict or allow features based on plan
 - Handle UI changes according to package
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Language Conversion

- language support
 - Language switcher (English , Hindi, Marathi)
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Company Registration Update

- Update company registration details
 - Select **client type managed by company**:
 - GEM
 - Corporate
 - Both
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Dashboard Logic (Client Type Based)

- Show dashboard data based on company selection
- Display:
 - Only GEM data
 - Only Corporate data
 - Both (combined view)
- Conditional widgets & stats

Backend Work Scope – CRM

1. Company Registration & Status API

- Update Company Registration API
- Implement company status logic to support:
 - GEM only
 - Corporate only
 - Both (GEM + Corporate)
- Provide clear status flags for frontend consumption

2. Profile Section APIs

- Fetch user profile details
- Update basic profile information
- Change password / preferences (if applicable)
- Ensure secure authentication and validation

3. Notifications & Events (Backend)

- Create backend notification events
- Trigger notifications for:
 - Invoice due date reminders
 - Payment pending alerts
 - Basic system notifications
- Provide APIs to fetch notifications for frontend display

4. Filters APIs (Across CRM Modules)

- Create reusable filter APIs for:
 - Clients
 - Employees
 - Invoices
 - Other CRM modules
- Support filters like:
 - Date range
 - Status
 - Client type

- Month / Year
- Ensure module-wise filter isolation

5. Material Module APIs

- Create Material API
- Store and manage material details
- Enable material selection and linking with invoices

6. Invoice Module (Ongoing Work)

- Month-based invoice creation logic
- Invoice calculation logic including:
 - Materials
 - Quantity, rate, tax
 - Total, paid, and pending amounts
- Maintain invoice status (Draft, Paid, Overdue, etc.)

7. Company-wise User Assignment & Login Logic

- Assign users to specific companies
- Restrict data access based on company-user mapping
- Ensure logged-in users can access only their assigned company data

8. Security & Validation

- Role-based and company-based access control
- Backend validation for all financial and business logic
- Secure APIs for frontend integration