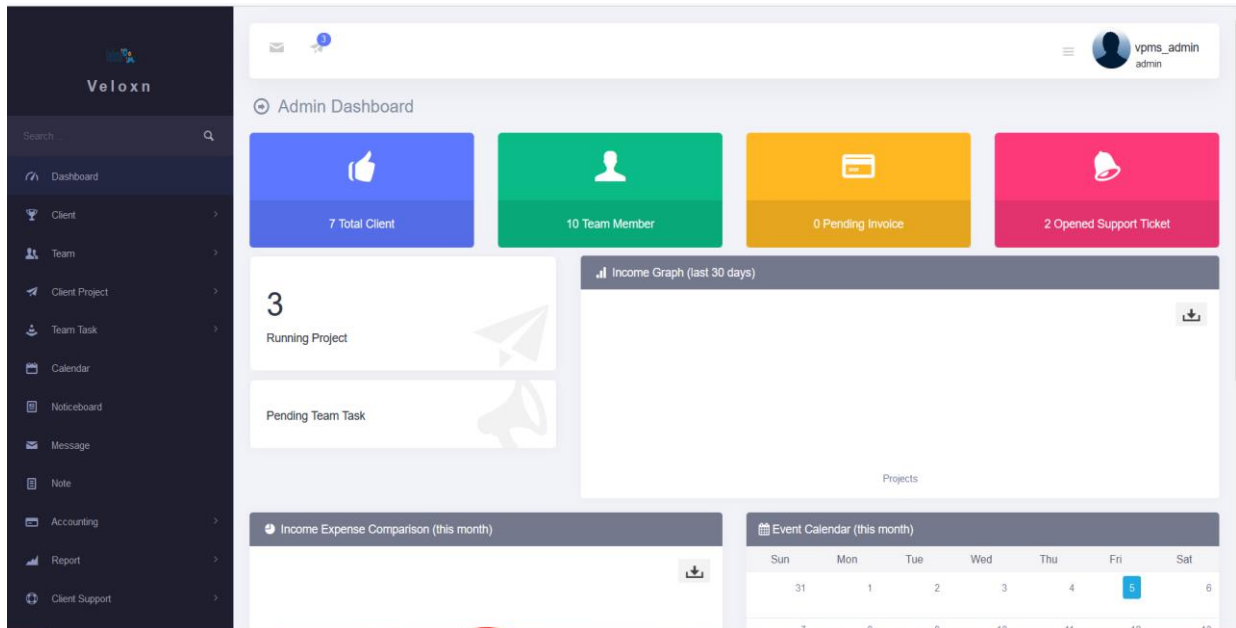


CRM – Leads, Clients and Projects Management Software

User Manual

1. Dashboard



- Admin Dashboard
- Running Project
- Pending Team Task
- Income Graph(last 30 days)
- Income Expense Comparison (this month)
- Event Calendar (this month)

2. Client

a. Person

The screenshot displays the Manage Client page with the following components:

- Manage Client** header
- Client List** table
- Search:**
- per page:** 10

#	Name	Photo	Project	Company	Contact	Options
1	Ratna Tata		0	TATA		Action
2	Amabani		1	Jio		Action
3	Ramesh Singh		1	Maruti		Action
4	devesh		0			Action
5	Vikas Mishra		0			Action
6	Vaibhav Yadav		1	Star IT Solution Pvt Ltd		Action

- View All Clients
- Add New Client

b. Company

Company

Company List

10 per page

Search:

Name	Company Logo	Associated Person	Website	Contact	Options
1 Star IT Solution Pvt Ltd		Vaibhav Yadav			Action
2 Maruti		Ramesh Singh	https://veloxn.com/smart-school-management-software.html		Action
3 Honda		Ramesh Singh	https://honda.com		Action
4 Jio		Amabani	https://jio.com		Action
5 TATA		Ratan Tata	https://tata.com		Action

Showing 1 to 5 of 5 entries

i. View All Company

ii. Add New Company

3. Team

a. Admin

Manage Admins

Admin List

10 per page

Search:

Name	Email	Contact	Address	Type	Options
1 vpms_admin	veloxnservices@gmail.com			Owner	Action
2 Ambani	ambani@gmail.com		B-4, Bareja Sadan Market, Main Mathura Road, Badarpur, Delhi -110044	Owner	Action
3 Rajesh Singh	rajesh@gmail.com		B-4, Bareja Sadan Market, Main Mathura Road, Badarpur, Delhi -110044	Administrator	Action

Showing 1 to 3 of 3 entries

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i. Add New Admin

ii. Admin List

b. Staff

Veloxn

Search...

Dashboard

Client

Team

- Admin
- Staff
- Permission

Client Project

Team Task

Calendar

Noticeboard

Message

Note

Manage Staff

Add New Staff

Stap List

10 per page

Search:

Name	Photo	Role	Contact	Options
1 Sonu Yadav		Engineer		Action
2 Sony Devi		Accountant		Action
3 Prabhavati Devi		Engineer		Action
4 Mahesh Singh		-		Action
5 Sohan Singh		Supervisor		Action
6 Surya Yadav		Manager		Action

i. Add New Staff

ii. Stap List

c. Permission

Veloxn

Search...

Dashboard

Client

Team

- Admin
- Staff
- Permission

Client Project

Team Task

Calendar

Noticeboard

Message

Note

Manage Account Role

Add New Account Role

Role List

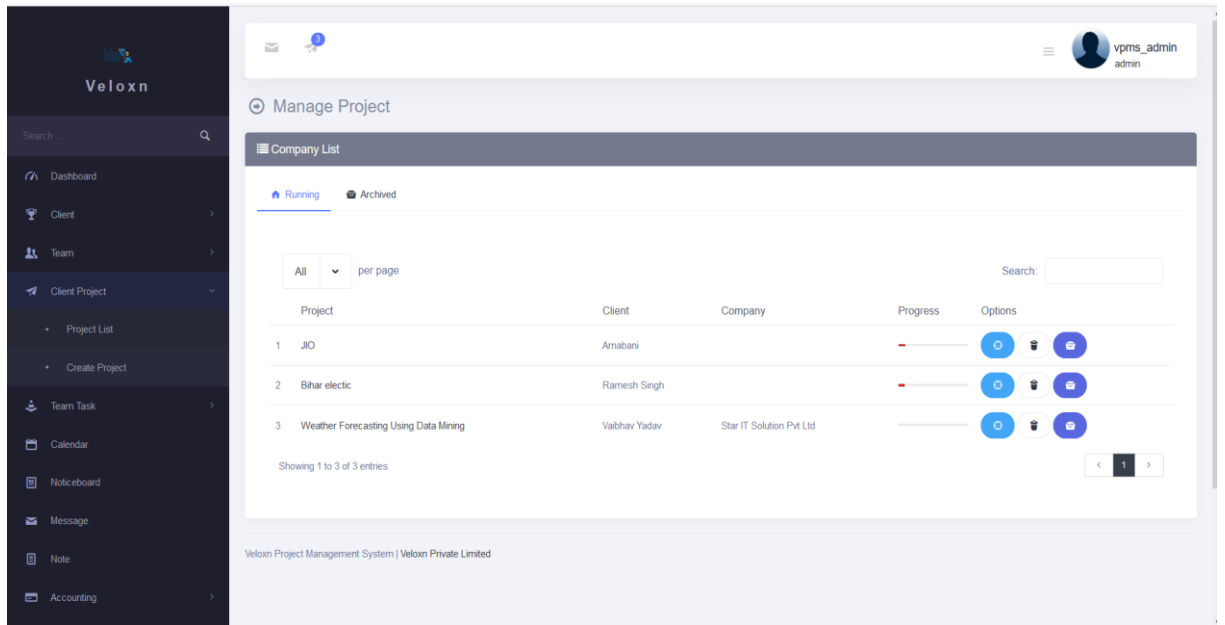
Name	Permissions	Number Of Staff	Options
1 Accountant	Manage Payment	2	Action
2 Engineer	Manage Assigned Project Manage Assigned Support Ticket	3	Action
3 Supervisor	Manage Assigned Project Manage Clients Manage Assigned Support Ticket Manage All Support Tickets	2	Action
4 Manager	Manage Assigned Project Manage Clients Manage Staffs Manage Assigned Support Ticket Manage All Support Tickets	2	Action

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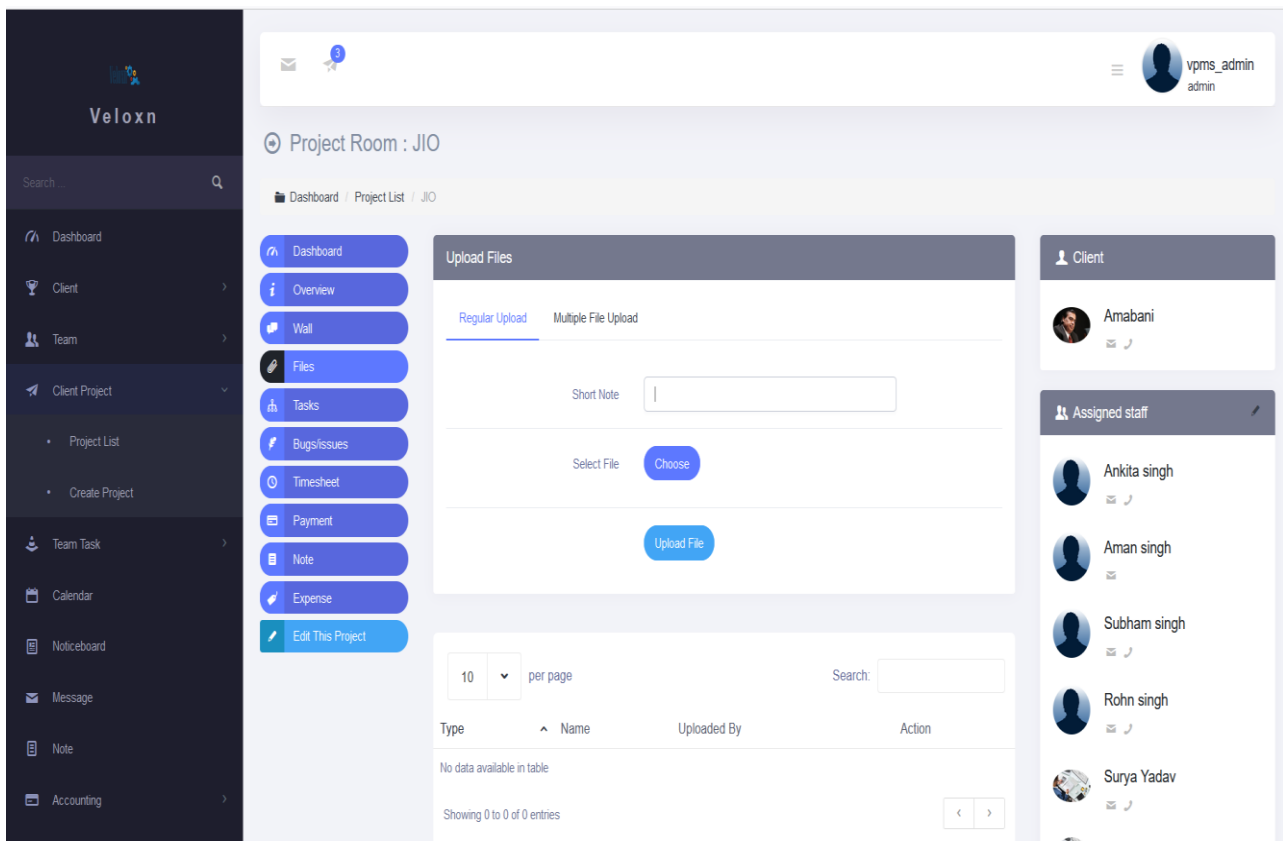
i. Add New Account Role

ii. Role List

4. Client Project
 a. Project List



- i. Running Project
- ii. Archived



b. Create Project

Veloxn

Search

Dashboard

Client

Team

Client Project

Project List

Create Project

Team Task

Calendar

Noticeboard

Message

Note

Accounting

Create New Project

Project Form

Project Title

Description

Budget

Start Time

Ending Time

Demo Url

i. Create New Project

5. Team Task

a. Running Tasks

Veloxn

Search

Dashboard

Client

Team

Client Project

Team Task

Running Tasks

Archived Tasks

Calendar

Noticeboard

Message

Note

Accounting

Running Projects

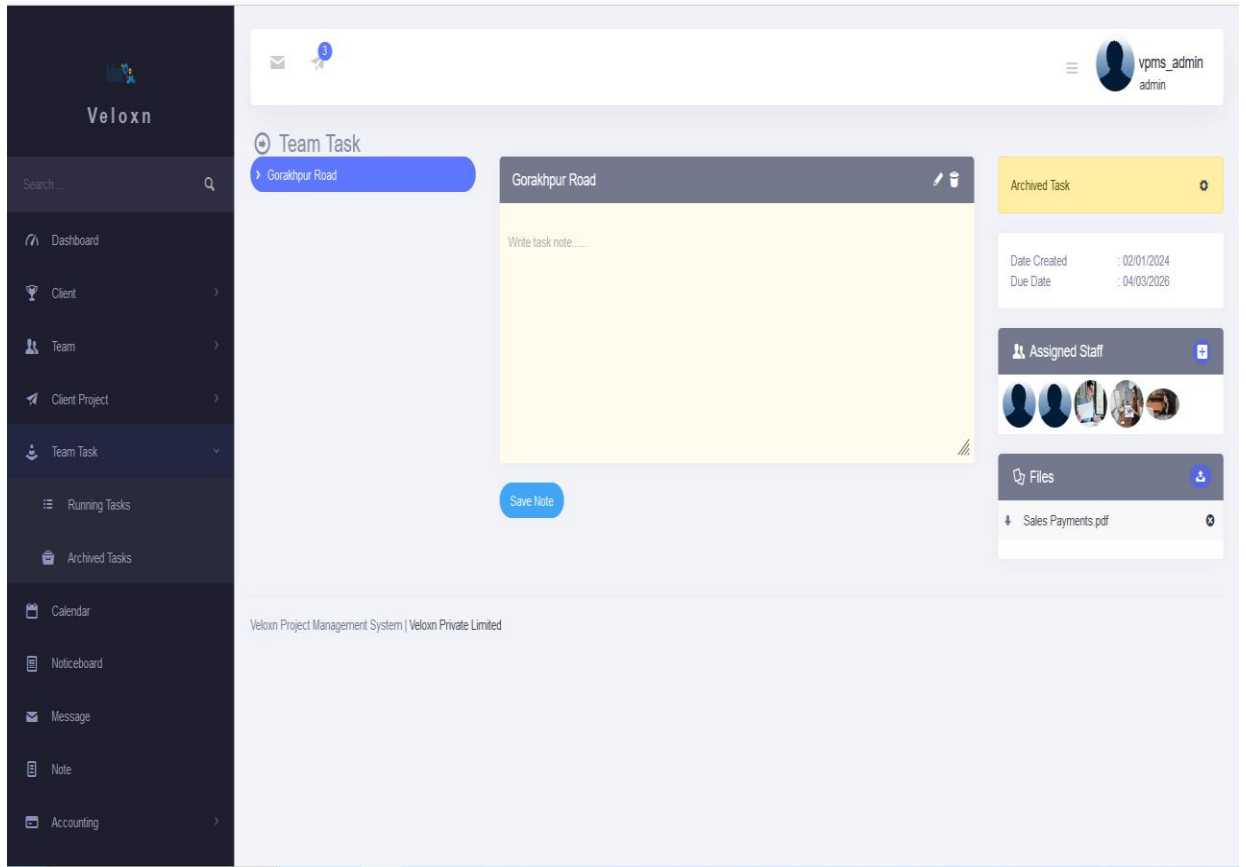
JIO	10%
Bihar electric	9%
Weather Forecasting Using Data Mining	0%

[View All Projects](#)

No running tasks.....

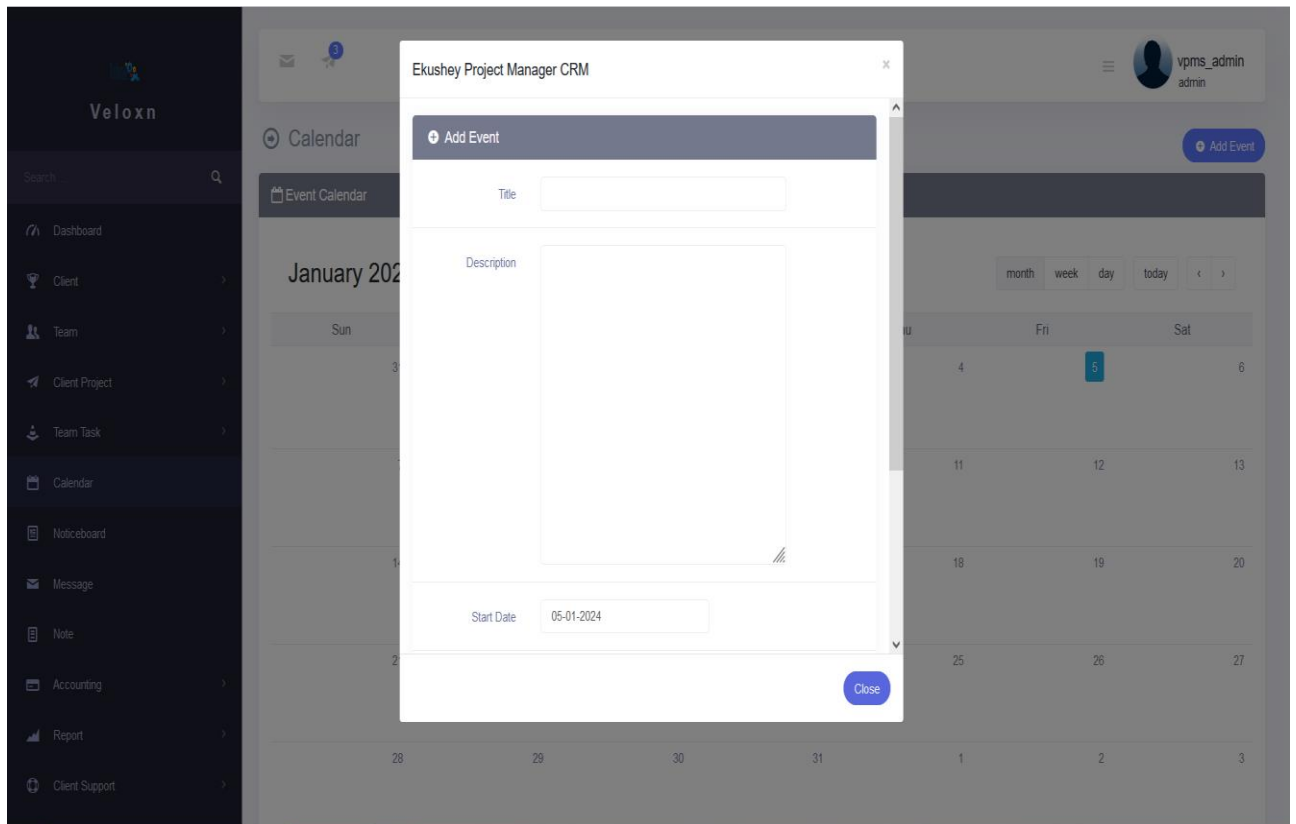
i. Add A New Team Task

b. Archived Tasks



i. Archived Team Tasks. Such as:- Gorakhpur Road

6. Calendar



- a. Add Event
- b. Event Data

7. Noticeboard

Veloxn

Search ...

Dashboard

Client

Team

Client Project

Team Task

Calendar

Noticeboard

Message

Note

Accounting

Report

Client Support

Noticeboard

10 per page

Search:

Title	Published By	Date Added	Visible For	Options
1 Tenduaa	vpms_admin	13th December 2023	All	Action

Showing 1 to 1 of 1 entries

View

Edit

Delete

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- a. Add Notice
- b. Noticeboard

8. Message

Veloxn

Search

Dashboard

Client

Team

Client Project

Team Task

Calendar

Noticeboard

Message

Note

Accounting

Report

Client Support

Private Messaging

New Message

Write New Message

Recipient:

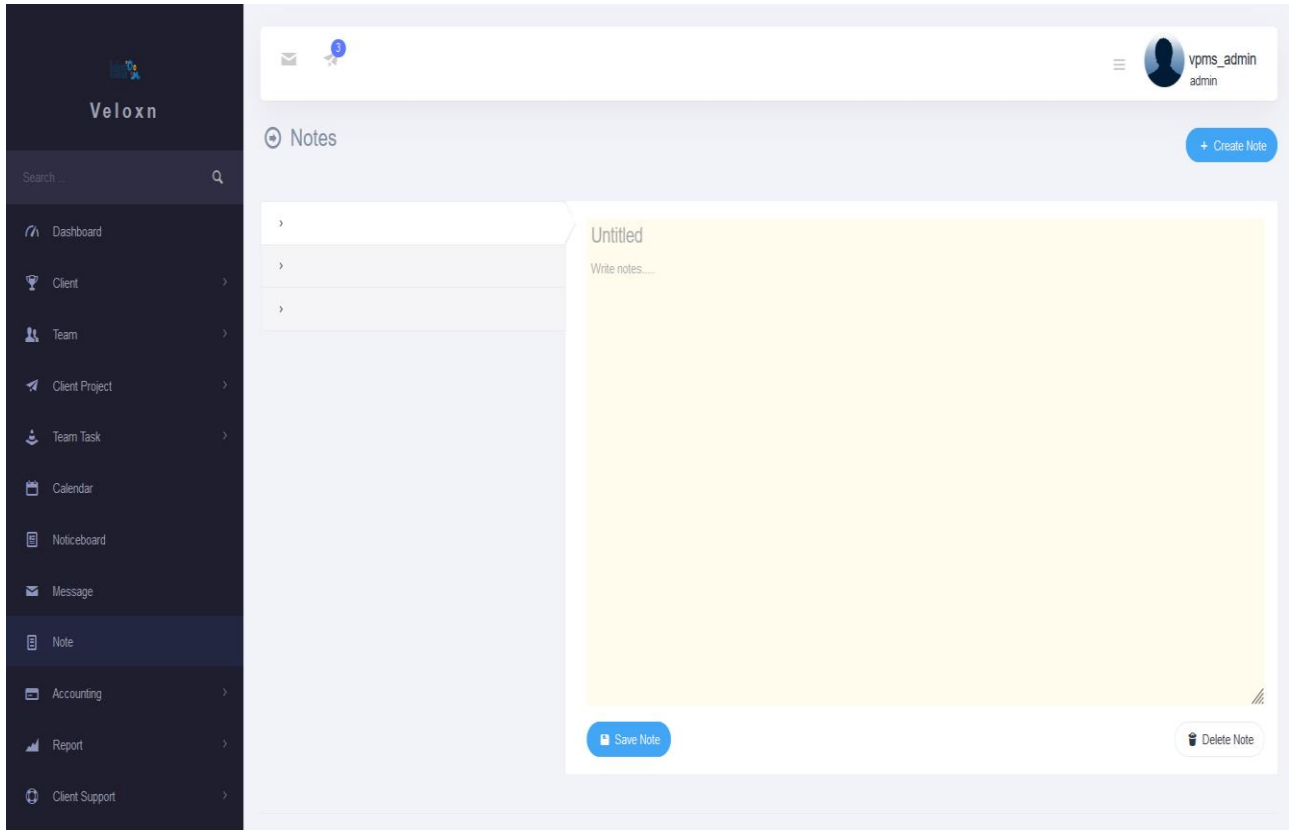
- Ankit Singh

Staff

- Ankit Singh
- Aman Singh
- Subham Singh
- Rohan Singh
- Surya Yadav
- Sohan Singh

- a. New Message

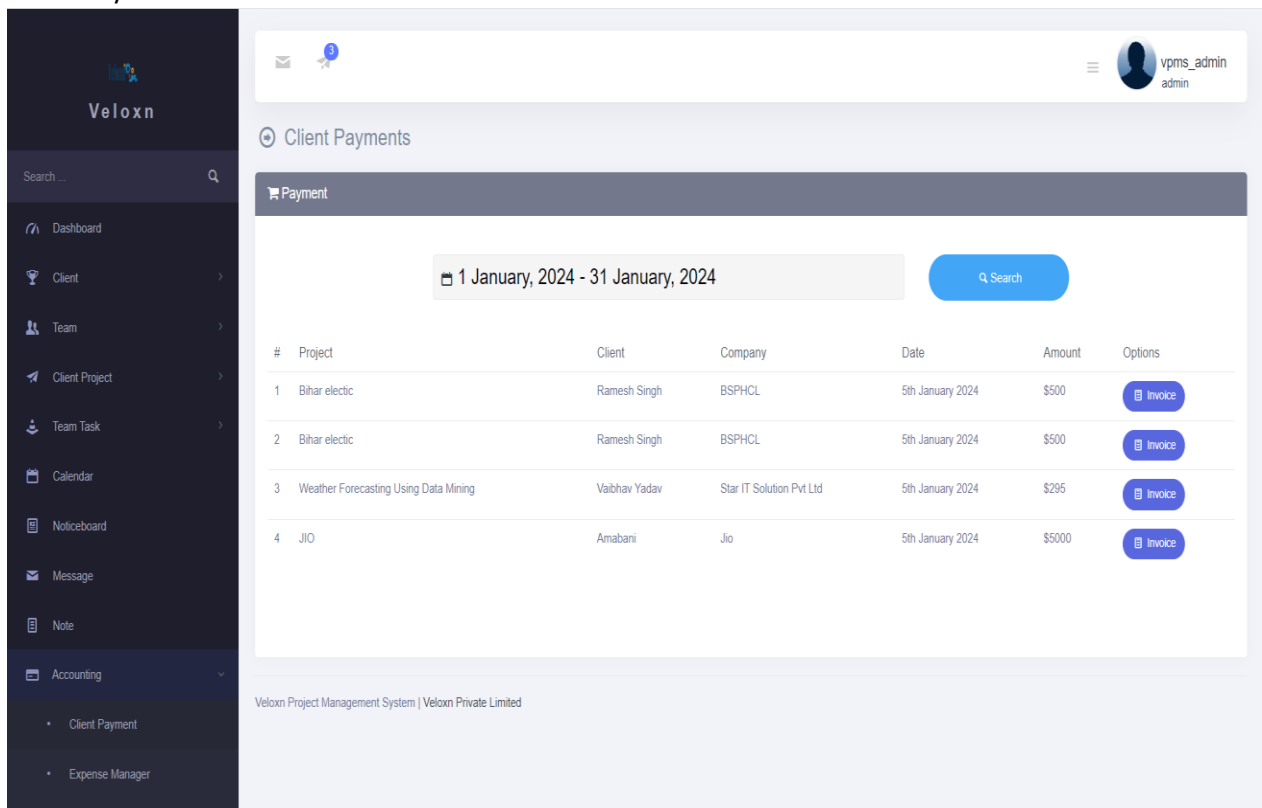
9. Note



- a. Create Note
- b. View Note

10. Accounting

- a. Client Payment



b. Expense Manager

Veloxn

Search ...

- Dashboard
- Client
- Team
- Client Project
- Team Task
- Calendar
- Noticeboard
- Message
- Note
- Accounting
 - Client Payment
 - Expense Manager

Manage Expenses Add Expense

Expenses

1 January, 2024 - 31 January, 2024 Search

#	Title	Category	Date	Amount	Options
1	10 Labours	Labor	6th January 2024	\$680	Action
2	Board	Repairs	5th January 2024	\$40	Action
3	Bus and Train	fare	4th January 2024	\$1000	Action
4	Bus Fare	fare	4th January 2024	\$150	Action
5	10 Labours	Labor	4th January 2024	\$200	Action
6	Bus Fare	fare	4th January 2024	\$50	Action

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c. Expense Category

Veloxn

Search ...

- Dashboard
- Client
- Team
- Client Project
- Team Task
- Calendar
- Noticeboard
- Message
- Note
- Accounting
 - Client Payment
 - Expense Manager

Expense Category Add Expense Category

Expense Category List

10 per page Search:

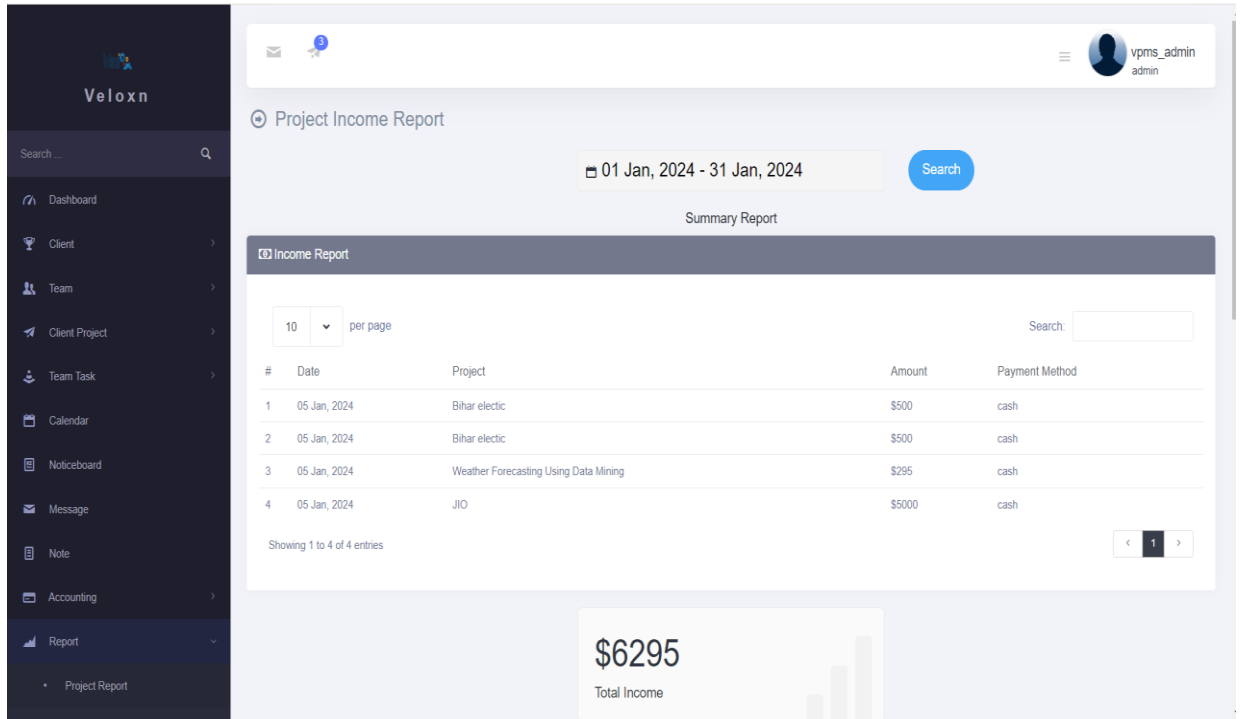
#	Title	Description	Options
1	Fuel	Fuel as an Operating Expense	Action
2	fare	Bus and train	Action
3	Labor	Labor is a hard cost because construction professionals physically contribute to construction projects.	Action
4	Material costs	The building blocks defining the project's material aspects.	Action
5	Repairs	Examples of incidental expenses include small repairs, minor equipment purchases, parking fees, or one-time professional service fees. Take control of your ...	Action

Showing 1 to 5 of 5 entries < 1 >

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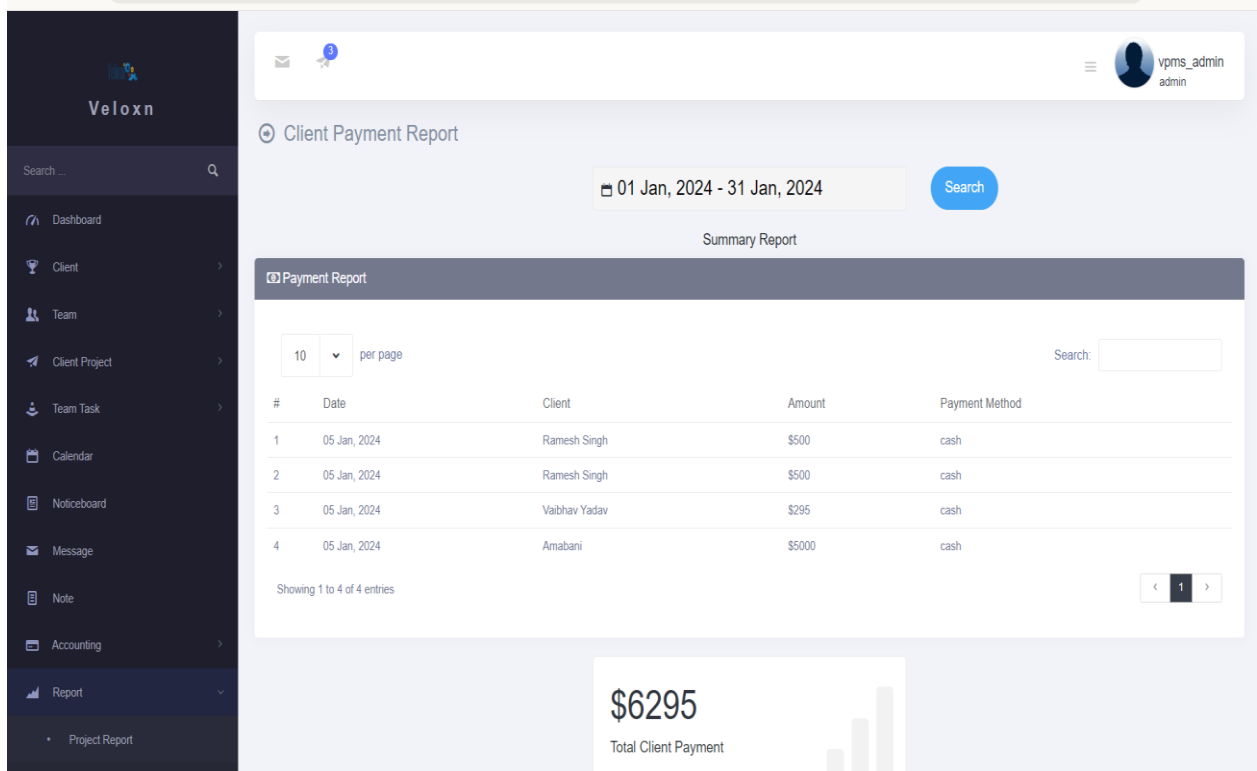
11. Report

a. Project Report



i. Project Income Report -> Total Income, Project Income Bar, Project Income Percentage.

b. Client Report



i. Client Payment Report -> Total Client Payment, Client Payment Bar, Client Payment Percentage.

c. Expense Report

Expense Report

01 Jan, 2024 - 31 Jan, 2024

Summary Report

Expense Report

10 per page

#	Date	Title	Expense Category	Amount
1	06 Jan, 2024	10 Labours	Labor	\$880
2	05 Jan, 2024	Board	Repairs	\$40
3	04 Jan, 2024	Bus and Train	fare	\$1000
4	04 Jan, 2024	Bus Fare	fare	\$150
5	04 Jan, 2024	10 Labours	Labor	\$200
6	04 Jan, 2024	Bus Fare	fare	\$50

Showing 1 to 6 of 6 entries

\$2120

i. Expense Report -> Total Expense, Expense Bar, Expense Percentage.

d. Income Expense Comparison

Showing 1 to 10 of 10 entries

\$6295 Total Income

\$2120 Total Expense

Income Expense Percentage

Income: 74.81%

Expense: 25.19%

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i. Income Expense Comparison Report -> Summary Report, Company List, Total Income, Total Expense, Income Expense Percentage.

12. Client Support

a. Ticket List

The screenshot shows the 'Support Ticket' page in the Veloxn system. The left sidebar contains navigation options: Dashboard, Client, Team, Client Project, Team Task, Calendar, Noticeboard, Message, Note, Accounting, Report, and Client Support. The main content area displays a 'Ticket List' with tabs for 'Opened' and 'Closed'. The 'Opened' tab is active, showing a table of tickets. The table has columns for Title, Ticket Code, Client, Assigned Staff, Status, Priority, and Options. There are 4 tickets listed. Below the table, it says 'Showing 1 to 4 of 4 entries'. The footer of the page reads 'Veloxn Project Management System | Veloxn Private Limited'.

Title	Ticket Code	Client	Assigned Staff	Status	Priority	Options
1 duplicate wires	18de8ee57f9d26	Amit Kumar		opened	medium	Action
2 Calculation errors	b7beb114b2e3145	Anabani		opened	low	Action
3 Bihar electljk photo	aaeb4ab1d9bb48	Vikas Mishra		opened	medium	Action
4 Add whether forecasting live images	64a52c40d75b68	Vaibhav Yadav	Subham Singh	opened	medium	Action

i. Opened

ii. Closed

b. Create Ticket

The screenshot shows the 'Create New Ticket' page in the Veloxn system. The left sidebar is the same as in the previous screenshot. The main content area displays the 'Ticket Form' with the following fields: Ticket Title (text input), Project (dropdown menu), Client (dropdown menu), Priority (dropdown menu), and Description (rich text editor with a toolbar). At the bottom, there is a 'Select File' button and a 'Choose' button.

i. Create New Ticket

c. Macro

i. Add Support Canned Message

13. Addons

a. Addon Manager

b. Available Addons

14. Settings

a. System Settings

The screenshot shows the 'System Settings' page in the Veloxn dashboard. The left sidebar contains navigation options: Dashboard, Client, Team, Client Project, Team Task, Calendar, Noticeboard, Message, Note, Accounting, Report, and Client Support. The main content area is titled 'System Settings' and contains a form with the following fields:

- System Name: Veloxn Project Management System
- System Title: Veloxn CRM Project Management System
- Address: New Delhi India
- Phone: 110044
- System Email: info@veloxn.com
- System Currency: US dollar
- Language: english
- Text Align: left-to-right (LTR)

A 'Save' button is located at the bottom of the form. The top right corner shows the user profile 'vpms_admin admin'.

b. Email Template

The screenshot shows the 'Email Template Settings' page in the Veloxn dashboard. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Email Template Settings' and features a list of templates on the left and a configuration form on the right.

Template List:

- New Project Opening
- New Client Account Opening
- New Staff Account Opening
- Payment Completion Notification
- New Support Ticket Notify Admin
- Support Ticket Assign Staff
- New Message Notification
- Password Reset Confirmation
- New Client Account Confirm
- New Admin Account Creation

Email Subject: New project created

Email Body:

Normal text | Black | Bold | Italic | Underline | [List Icons] | [Link Icon] | [Image Icon]

Hello, [CLIENT_NAME],
we have created a new project with your account.

Project name: [PROJECT_NAME]
Please follow the link below to view status and updates of the project.
[PROJECT_LINK]

Instruction:

[Save Template]

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c. Smtplib Settings

Veloxn

Search ...

- Dashboard
- Client
- Team
- Client Project
- Team Task
- Calendar
- Noticeboard
- Message
- Note
- Accounting
- Report
- Client Support

Smtplib Settings

Smtplib Protocol: smtp

Smtplib Host: ssl://smtp.googlemail.com

Smtplib Port: 465

Smtplib User: shorajsingh121@gmail.com

Smtplib Password: [Masked]

Save

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d. Payment Settings

Veloxn

Search ...

- Dashboard
- Client
- Team
- Client Project
- Team Task
- Calendar
- Noticeboard
- Message
- Note
- Accounting
- Report
- Client Support

Payment Settings

Setup Payment Informations

PayPal

Stripe

Mode: Sandbox

Client Id (Sandbox): AZDxjDScFpQjYwTOUwKbyN_bDH0gqgF4eYXlewBP4-8aqX3PIV8e1GWU6iB2CUXiIA

Client Id (Production): Someld

Save Changes

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e. Language Settings

The screenshot displays the 'Multi Language Settings' interface in the Veloxn system. On the left is a dark sidebar with the Veloxn logo and a search bar. Below the search bar is a list of navigation items: Dashboard, Client, Team, Client Project, Team Task, Calendar, Noticeboard, Message, Note, Accounting, Report, and Client Support. The main content area has a top header with a mail icon, a notification bell with '3', and a user profile for 'vpms_admin admin'. The page title is 'Multi Language Settings'. Below the title are three tabs: 'Language List', 'Add Phrase', and 'Add Language'. The 'Add Language' tab is selected. The content of this tab includes the text 'Add New Language', a text input field, and a blue 'Save' button. At the bottom of the page, the footer text reads 'Veloxn Project Management System | Veloxn Private Limited'.