

Ekushey Project Manager CRM

Manage your client, project, team in the easiest way!

User Manual

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- Admin Panel
- Client Panel
- Staff Panel

Admin Panel

Dashboard

- Total clients, team members, opened support tickets, pending milestone invoices, pending team tasks and running projects at a glance
- Income graph of last 30 days
- Pie chart representation of current month's income expense comparison
- Event calendar of current month

Manage Clients

- Manage all clients of the system
- Two types of clients : individual and company
- Create a new client
- Edit any client
- View detailed profile of a client including his/her projects and payment information
- Approve pending client requests that are created externally by signing up on the system
- Notify clients via email after new account creation or pending account approval

- Delete a client

➤ *How to create a new client ?*

- Go to admin panel > 'Client' > Select a client type (person/company)
- Click on 'Add New Client' or 'Add New Company' button on the top right depending on the client type you selected
- Fill out and submit the form
- When creating an individual client if 'Notify Client' checkbox is checked then an email notification will be sent to the client

➤ *How to view client profile ?*

- Go to admin panel > 'Client' > Select a client type (person/company)
- From client information table's 'Options' column click on 'Action' > 'Profile'

➤ *How to approve pending client requests ?*

- Go to admin panel > 'Client' > 'Person'
- Click on 'Pending Clients' tab
- From pending client information table's 'Options' column click on 'Action' > 'Approve'

Manage Teams

- Manage admins, staffs and staff permissions

- Two types of admin can be created such as owner or administrator
- Both types have all the admin facilities but the owner only is able to delete other administrators
- Staffs can be assigned specific roles
- Custom account roles can be created and can be given particular set of permissions to fulfill that role

Managing Projects

- Manage all projects of the system
- Create a new project
- Edit any project
- View detailed information of projects
- Archive a completed project
- Delete a project

➤ How to view project details ?

- Go to admin panel > 'Client Project' > 'Project List'
- From project information table's 'Options' column click on 'Project Room'

➤ How to send discussion message on project ?

- Go to project room
- Click on 'Wall' button from the options on left side of the page

- Type a new message and click on 'Post Message'
- Files can also be added with a message

➤ *How to upload files for a project ?*

- Go to project room
- Click on 'Files' button from the options on left side of the page
- Choose a file and click on 'Upload File'
- Multiple files can be uploaded from 'Multiple File Upload' tab
- Files can also be uploaded via dropbox from 'Dropbox Upload' tab
- Uploaded project files can be downloaded, saved to user's dropbox account or deleted

➤ *How to add tasks for a project ?*

- Go to project room
- Click on 'Tasks' button from the options on left side of the page
- Click on 'Add New Task' button below the calendar
- Fill out and submit the form
- All created tasks are shown in the calendar

➤ *How to create payments for a project ?*

- Go to project room

- Click on 'Payment' button from the options on left side of the page
- Click on 'Add New Milestone' button below the calendar
- Fill out and submit the form
- All created milestones are shown in the calendar and also in a table below the calendar
- This table offers several options for each milestone
- Every milestone/invoice can be printed or sent via email
- For every unpaid milestone payment can be taken manually

Manage Team Tasks

- Manage tasks for a team of staffs
- Create a new task
- Tasks can be of two category : running or archived
- Edit any task
- View detailed information of a task
- Delete a task

Manage Events/Calendar

- Manage all events
- Create a new event
- Edit any event
- Organized calendar view of all events
- Delete an event

Private Messaging

Send and receive messages between admin, client or staff users

➤ How to send new message?

- Go to admin panel > 'Message'
- Click on 'New Message' button
- fill out the form and click on 'Send' button

➤ How to reply to received messages?

- A list of all recipients and senders is shown on message page.
- Click on any sender/receiver of the list to view associated messages, fill out the form at the bottom and click on send to reply to any message.

Manage Notes

- Manage all notes
- Create a new note
- Edit any note
- Delete a note

Manage Accounting

- View all client payments for any project
- Manage expenses and expense categories
- Create a new expense or expense category
- Edit any expense or expense category
- Delete an expense or expense category

View Reports

- View detailed reports on project income, client payment, system expense and income-expense comparison
- Graph view and pie chart representation of all the reports
- Handy search option for searching reports between a particular date range

Manage Client Support/Tickets

- Manage all tickets
- Create a new ticket
- View detailed information of a ticket
- Assign staff, update ticket status and reply to tickets with the option to include files
- Delete a ticket

Manage Settings

❖ System Settings

View and edit system settings

➤ *How to change text alignment?*

- Login to your admin
- Go to menu : Settings > System Settings
- Choose Text align > Right to Left (RTL) or Left to Right (LTR)
- Save your option

➤ How to integrate dropbox for uploading and downloading project files?

- Go to the following url


<https://www.dropbox.com/developers/apps/create>


- You will find a view like the image below

Developer home
App Console
Drop-ins
Core API
Dropbox for Business API
Webhooks
Developer guide
OAuth guide
Branding guide
Blog
Support

Create a new Dropbox Platform app

What type of app do you want to create?

 **Drop-ins app**
Chooser or Saver

☐  **Dropbox API app**

To create a Dropbox for Business app, visit [the Dropbox for Business app creation page](#).

Provide an app name, and you're on your way.

Create app

- Select Drop-ins-app and enter your app name in the input field and hit create app button

- After hitting the button you will be redirected to a page similar to the following image

Developer home
App Console
Drop-ins
Core API
Dropbox for Business API
Webhooks
Developer guide
OAuth guide
Branding guide
Blog
Support

Your Project Manager App

Settings Details App metrics

Status	Enabled	Disable app
Permission type	Drop-ins ⓘ	
App key	fx00yuiew5eeyfb	
Drop-ins domains	<input type="text" value="yourdomain.com"/>	Add

If using [Drop-ins](#) on a website, the domain of that site.

- Add your domain name here in Drop-ins domains. Above this field you will find an app key. Enter this key in the system settings of this application and save.

❖ Email Settings

System email sending and those email sending templates can be customized from admin panel.

- To manage email templates, go to : "Settings > Email settings" menu.
- Follow the instructions, the phrase that will be replaced by dynamic values during sending emails are written at the bottom.
- Update a template subject and body.

❖ Payment Settings

- View and edit payment settings
- Set your desired system currency
- Insert your valid paypal email to receive payments to your paypal account via paypal payment
- Insert your valid stripe secret key and publishable key to receive payments to your stripe account via stripe payment

❖ Language Settings

Add and manage language settings

➤ *How to convert to your language?*

Converting the software to your native language is so easy. Follow these steps :

- Login to administrative panel
- Go to settings > Language Settings
- You can add / delete any language to the database
- Update the default phrases into your language and save it

Simply and easily make the software your native!

➤ *How to import language pack?*

There are 17 language pack available. Follow these steps to import language pack :

- Login to phpmyadmin
- Go to your database, where you have installed this script
- Go to import menu in right side
- Upload the language.sql file from 'uploads' directory and import it
- You will see 17 language pack is installed in your admin panel

Simply and easily make the software your native!

➤ *How to change default language?*

- Login to your admin
- Go to menu : Settings > System Settings
- Choose your language from language list
- Save your option

Client Panel

Dashboard

Contains the quick links to project list, project quote list, payment history and support tickets

Manage Projects

- View all projects and project quotes of the client
- Create a new project quote
- View detailed information of projects

➤ *How to view project details ?*

- Go to client panel > 'Project' > 'Project List'
- From project information table's 'Options' column click on 'Project Room'

➤ *How to create discussions on project ?*

- Go to project room
- Click on 'Wall' button from the options on left side of the page
- Type a new message and click on 'Post Message'
- Files can also be added with a message

➤ *How to upload files for a project ?*

- Go to project room

- Click on 'Files' button from the options on left side of the page
- Choose a file and click on 'Upload File'
- Multiple files can be uploaded from 'Multiple File Upload' tab
- Files can also be uploaded via dropbox from 'Dropbox Upload' tab
- Uploaded project files can be downloaded and saved to dropbox

➤ *How to create payments for a project ?*

- Go to project room
- Click on 'Payment' button from the options on left side of the page
- All created milestones are shown in the calendar and also in a table above the calendar
- Click on the 'Make Payment' button for any unpaid milestone to open its invoice page
- Choose either 'Pay With PayPal' or 'Pay With Stripe'

View Payment History

- View all payments of the client
- View detailed information of a payment
- Print invoice of a payment

Manage Notes

- Manage all notes
- Create a new note
- Edit any note
- Delete a note

Private Messaging

Send and receive messages between admin and client users

➤ How to send new message?

- Go to client panel > 'Message'
- Click on 'New Message' button
- fill out the form and click on 'Send' button

➤ How to reply to received messages?

- A list of all recipients and senders is shown on message page.
- Click on any sender/receiver of the list to view associated messages, fill out the form at the bottom and click on send to reply to any message.

Manage Client Support/Tickets

- View all tickets of the client
- Create a new ticket
- View detailed information of a ticket
- Reply to opened tickets with the option to include files

Edit Profile

Edit profile and password of the admin

Staff Panel

Dashboard

Contains the quick links to assigned projects, client management, staff management and assigned support tickets

Manage Clients

- Manage all clients of the system
- Two types of clients : individual and company
- Create a new client
- Edit any client
- View detailed profile of a client including his/her projects and payment information
- Approve pending client requests that are created externally by signing up on the system
- Notify clients via email after new account creation or pending account approval
- Delete a client

Manage Teams

- Manage staffs and staff permissions
- Create new staffs
- Edit any staff
- Delete a staff
- Staffs can be assigned specific roles
- Custom account roles can be created and can be given particular set of permissions to fulfill that role

Manage Assigned Projects

- Manage all projects assigned to the client
- View detailed information of projects

➤ How to view project details ?

- Go to staff panel > 'Assigned Client Projects'
- From project information table's 'Options' column click on 'Project Room'

➤ How to create discussions on project ?

- Go to project room
- Click on 'Wall' button from the options on left side of the page
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- Click on 'Tasks' button from the options on left side of the page
- Click on 'Add New Task' button below the calendar
- Fill out and submit the form
- All created tasks are shown in the calendar

Manage Team Tasks

- View all team tasks associated with the staff
- Tasks can be of two category : running or archived
- View detailed information of a task

- Create notes and upload files for a task

Private Messaging

Send and receive messages between admin and staff users

➤ How to send new message?

- Go to staff panel > 'Message'
- Click on 'New Message' button
- fill out the form and click on 'Send' button

➤ How to reply to received messages?

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Manage Notes

- Manage all notes
- Create a new note
- Edit any note
- Delete a note

Manage Accounting

- View client payments
- Manage expenses and expense categories
- Create a new expense or expense category
- Edit any expense or expense category
- Delete an expense or expense category

Manage Assigned Support Tickets

- Manage all tickets assigned to the staff
- View detailed information of a ticket
- Update ticket status and reply to opened tickets with the option to include files

Edit Profile

Edit profile and password of the staff