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FAST BUSINESS PORTAL COMPLETE BUSINESS SOLUTION

PROJECT

DATE	PROJECT NAME	PREPARED BY
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FAST BUSINESS PORTA FEATURES

FAST BUSINESS MANAGEMENT PORTAL is company/self-hosted Customer Relationship Management software that is a great fit for almost any company, freelancer or many other uses. With its clean and modern design, FAST BUSINESS MANAGEMENT PORTAL can help you look more professional to your customers and help improve business performance at the same time.

Managing customers is important and FAST BUSINESS MANAGEMENT PORTAL helps in several ways:

- Manage and invoice projects with the powerful Project Management Feature.
- Link tasks to many FAST BUSINESS MANAGEMENT PORTAL features and stay organized.
- Build professional, great looking estimates and invoices.
- Powerful support system with ability to auto import tickets.
- Track time spent on tasks and bill your customers. Ability to assign multiple staff members on task and track timer per assigned staff.
- Add task followers even if the staff is not project member. The staff member will be able to track the task progress without accessing the project.
- Keep track of leads in one place and easily follow their progress. Ability to auto import leads from email, add notes, create proposals. Organize your leads in stages and change stages easily with drag and drop.
- Create good looking proposals for leads or customers and increase sales.
- Records your company/project expenses and have the ability to bill to your customers and auto convert to invoice.
- Know more about your customers with powerful CRM.
- Increase customer retention via built-in Surveys.
- Use the Goals Tracking feature to keep sales goals in mind.

- Create announcements for your staff members and customers.
- Use Contracts feature to lock in current and future sales.
- Custom fields can store extra information for customers, leads and more.
- Receive payments from Paypal and Stripe in different currencies.
- Tons of configurable options.
- Style the CRM to your company branding with the powerful theme styling feature.
- Separated media folder for non-admin staff members to work inside the CRM and organize their uploads and files.
- Great looking calendar for each staff member based on staff permissions.
- Follow ups, reports, notes, files and many more features.

CRMs need to focus on customers and FAST BUSINESS MANAGEMENT PORTAL does that with a powerful support system that helps you track and resolve issues quickly via the integrated ticket system and customer reminders. Assign reminders to yourself, one or many staff members and with one click, reminders can be sent to email and in-app notification system. These features and more can take customer satisfaction to the next level.

FAST BUSINESS MANAGEMENT PORTAL has many features designed to fit many applications. Read more about the features below and try the demo to see how FAST BUSINESS MANAGEMENT PORTAL can help you succeed.

Customers

Easily manage your customers and their contacts, create multiple contacts for your customers and set proper permissions. Customers area is fully separated from the admin area. Clients have their own client portal with all financial data from your company presented in clear view.

Invoices

FAST BUSINESS MANAGEMENT PORTAL allows you to keep in track your invoices, items and generate reports. Add new currencies, using multiple currencies is allowed by previously setup customer currency. Invoice with different tax based on item.

Recurring Invoices

Create recurring invoices that will be re-created automatically without you lifting a finger, based on the specified period for the recurring invoice. The period time could be days, weeks, months or years.

Recurring Expenses

Creating recurring expenses. Set up a recurring expense and the expense will automatically be re-created after the specified period. The period time could be days, weeks, months or years

Estimates

Create estimate within a minute, sent to your customers and wait to accept, add notes for better organization for your next actions, create reminders. Ability to auto convert the estimate to invoice after customer accept.

Proposals

Create good looking proposals for leads or customers and increase sales. Receive notification when proposal is accepted/declined and auto send thank you email to your customer after accepting the proposal. Proposal overdue notice before X days available.

Online Payments

Receive payments from Paypal, Stripe, Mollie, Authorize.net, 2Checkout, PayU Money and Braintree, we have implemented payment gateways that are available in most of the countries.

Projects

Manage projects and track time spent on project for each staff member. Record project expenses and invoices and bill your clients faster. Professional Gantt Chart included for each project and staff member.

Milestones

Create milestones for projects and track time spend based on milestone. Ability to Drag and Drop tasks between milestones.

Leads

Leads or potential clients are really important part to any company. Every company trying everyday to get new leads. Very offen happend some potential client to call and ask for specific service that you company serve and then sometimes this is forgotten. With FAST BUSINESS MANAGEMENT PORTAL you will never forget your potential clients and you will be able to manage all of them in one place. Keep track of leads in one place and easily follow their progress. Ability to auto import leads from email, add notes, create proposals. Organize your leads in stages and change stages easily with drag and drop. Ability to auto import leads from emails and web to lead forms, import leads from .CSV file included.

Web to Lead Forms

Create unlimited web to lead forms and inject in your landing page or website. This feature allows you to import leads into FAST BUSINESS MANAGEMENT PORTAL from form. Use web to lead forms to gather potential clients information, allow them to request quotes directly from your website.

Contracts

You can add new contracts based on your clients. Adding contracts is very simple, you can set start date and end date and have clear view of all your company contracts in one place. You wont need anymore to search in your desk documents. Create PDF contracts and send to your customers from FAST BUSINESS MANAGEMENT PORTAL. Contract overdue reminders available.

Tickets

Great support ticket system with autoresponse, private ticket staff notes, ticket assignments, attachments, predefined ticket replies, insert knowledge base link, ticket priorities, ticket statuses. Feature for auto importing tickets via Email Forwarder/IMAP method included. Let your customer reply and create new tickets via email, without accesing the client portal.

Departments

Assign your staff to specific departments and ability to auto import tickets by department email.

Custom Fields

Custom fields can store extra information for customers, leads, tickets, invoices, comapany, estimates and more.

Staff Reminders

Setup staff reminders for staff member with ability to notify by email and built-in. Reminders are available for important features.

Theme Styling without coding

Style the CRM to your company branding with the powerful theme styling feature. To fit best for your needs create custom.css and add your own styles.

Events

Create private or public events. Receive notification when an event is coming built-in and email.

Easily re-organize admin menu

You can re-organize admin main menu and the setup menu from in few seconds, you need only to login in your admin area. No coding is required. Add/Remove icons to fit for your needs.

Email Templates

Setup predefined email templates from text editor. Merge fields available and multi language options available.

Staff Roles & Permissions

You can give staff a specific permissions what can do or can't do. Role permissions can be overided for each staff.

Goals Tracking

Setup goals and tracking achievements. Use the Goals Tracking feature to keep sales goals in mind.

Personal Todo

Every staff member can have their own personal todo dashboard which will allow your staff member to easily organize the their work.

Staff

Manage all your staff members from one place.

Company Newsfeed

Share great company events, upload documents, easy employees communications.

Staff Tasks

Assign task to multiple employees, add task followers, task comments allowed, task attachments. Link tasks to many FAST BUSINESS MANAGEMENT PORTAL features and stay organized.

Recurring Tasks

Create tasks that will be auto created for a given period.

Surveys

Create surveys with one click. Send to staff, leads, clients or manually created mail lists. Increase customer retention via built-in Surveys.

Reports

Reports
Sales
Expenses Report
Reports by customer
Custom date picker
Leads Conversions
Knowledge base articles (Track if your article is usefull to clients, improve text based on votes)

Knowledge Base

Add knowledge base articles from text editor. “Did you find this article useful?” vote included in clients area.

Media Library

Upload files in media library. Each staff member that is not admin have their own folder for uploading files.

Auto Backup Database

Setup auto backup database each X days to prevent losing your important data.

Sensitive data is encrypted

FAST BUSINESS MANAGEMENT PORTAL encrypts all sensitive data in the database with unique encryption key. Encryption performed on email passwords, api keys, api passwords etc..

Server Side Datatables

FAST BUSINESS MANAGEMENT PORTAL is using serverside datatables to perfectly handle large databases.

Responsive

FAST BUSINESS MANAGEMENT PORTAL is fully responsive. You can easily access your data from mobile or tablet.

Google reCaptcha

Google reCaptcha available for admin login, customer login and customer register area.

Action Hooks

To prevent editing the core files we created action hooks for some important functionalities. Send us an email if you want we to include another action hook based on your needs.

Activity Log

Track all staff activity. Adding new items, creating, deleting.

website front end

this portal support cms

Customer login

Our portal support customer login panel to support all kind of information regarding that client

Important Modules

1. Webmail
    a. This module integrates a Mailbox client at your FAST BUSINESS MANAGEMENT PORTAL's dashboard.
    By enabling, you will be able to allow your staff members to send/receive/draft/organize e-mails of their IMAP accounts, inside their dashboard
    b. You need an IMAP account which can accept connections over SSL/TLS from a third party app (your FAST BUSINESS MANAGEMENT PORTAL installation). If you are running under a 2-way factor authenticator, you need to disable it elsewise, connections wont be accepted by your server.
    - You need to have cronjob of FAST BUSINESS MANAGEMENT PORTAL set up correctly, as per instructions found here in documentation
    - You wont be able to use IMAP functionalities under a POP account. Make sure that your account is an IMAP-based one.
    - This module was made in order to be able to view/respond to all incoming emails, within FAST BUSINESS MANAGEMENT PORTAL. Sent emails from this module will be stored into your sent folder if this option is enabled on your server, but actions like Star/Trash/Important will affect your local inbox (FAST BUSINESS MANAGEMENT PORTAL view) only and they will be stored in the database, along with their attachments in the appropriate folder. This module has no control over your IMAP server – it is not a two-way sync module, it will fetch your unread Inbox mails.
    - This module parses emails in plain text mode, in order to avoid malicious code being executed inside your dashboard.
2. Account plaining
    a. **Account Planning Module** for FAST BUSINESS MANAGEMENT PORTAL, is a strategic account planning tool, which, through a customer-centric approach to identifying priority accounts capturing and analysing critical information, allows you and your staff members to develop a strategy to expand and grow existing customer relationships.

    It creates a complete plan, with plenty of useful information through available options and data, separating them under four basic sectors for every plan: **Due Diligence / Team Information / Service Ability Offering and Project Planning.**

    It also uses MindMap, based on GOJS, in order for staff members to be able to create a visual approach of their strategy, along with Handsontable which helps at data entry and logs staff member's activity inside Activity Log. Please check out the uploaded videocast and screenshots, which demonstrates all visible parts of the module.
3. Accounting & Book keeping
    a. **Accounting** is the process of recording and tracking financial statements to see the financial health of an entity. This is done by inputting, sorting, measuring, and then communicating transactions in various formats. Accounting consists of bookkeeping and analysis. Bookkeeping, or financial accounting, consists of recording transactions, which can include purchases, sales, and receipts of an individual or an organization. Once the bookkeeper records and organizes all of the transactions, the next step of accounting is to analyze these transactions into helpful reports which will show the state of one's finances. These reports can include profit/loss statements, cash flow reports, and can track sales tax to keep a close eye on what is owed come tax time. With small business accounting done right, small business owner will be able to have a clear understanding of the state of your finances so you can make better decisions based on what you have available.
    b. Benefits of accounting and bookkeeping

i. Using this module helps in relieving the burden of manual data entry, prevents common human errors, helps businesses and accountants when tax time comes around and allows the user to look at in-depth reports of how their business' finances are faring. Perhaps the biggest advantage of this module is all of the time it will save. With this module, all of their financial reports will be consolidated into one online system, making it easier to keep track of their records. An accounting module for businesses offers the ability to automate many processes which will not only save time but will also ensure accuracy and efficiency with one's financial reports.

c. Module Features

i. **Dashboard**: Profit & Loss Chart, Income Chart, Expense Chart, Cashflow Chart and Bank Accounts Overview

ii. **Transactions**:
1. Mapping Bank Statements to Accounting
2. Mapping Invoices to Accounting
3. Mapping Payments to Accounting
4. Mapping Expenses to Accounting
5. Mapping Purchase to Accounting (need to integrate with Purchase Management module)
6. Mapping Inventory to Accounting (need to integrate with Inventory Management module)
7. Mapping Payroll to Accounting (need to integrate with HR Payroll module)

iii. **Item Mapping Setup**

iv. **Expense Category Mapping Setup**

v. **Tax Mapping Setup**

vi. **Banking Rules**: to automatically categorize transactions

vii. **Journal Entry**: to record transactions in the general ledger

viii. **Transfer**: to transfers of amounts between accounts

ix. **Chart of Accounts**: is a list of the account numbers and names relevant to your company. Typically, a chart of accounts will have four categories (Asset accounts, Liability accounts, Income accounts and Expense accounts).

x. **Reconcile**: is the process of matching transactions entered into module against your bank or credit card statements

xi. **Budgets Management**: supports preparing budgets, which help you monitor, track, and compare expected income and expenses with actual income and expenses. When you prepare a budget, you typically prepare it for a fiscal year, and you can opt to supply budget amounts or use historical amounts

xii. **Business Overview Reports**:
1. Balance Sheet Comparison: what you own (assets), what you owe (liabilities), and what you invested (equity) compared to last year.
2. Balance Sheet Detail: a detailed view of what you own (assets), what you owe (liabilities), and what you invested (equity).
3. Balance Sheet Summary: a summary of what you own (assets), what you owe (liabilities), and what you invested (equity).
4. Balance Sheet: what you own (assets), what you owe (liabilities), and what you invested (equity).

5. Custom Summary Report: a report you build from scratch. With more options to customise.
6. Profit and Loss as % of total income: your expenses as a percentage of your total income.
7. Profit and Loss Comparison: your income, expenses, and net income (profit or loss) compared to last year.
8. Profit and Loss Detail: profit and Loss Detail
9. Profit and Loss year-to-date comparison: your income, expenses, and net income (profit or loss) compared to this year so far.
10. Profit and Loss: your income, expenses, and net income (profit or loss). Also called an income statement.
11. Statement of Cash Flows: cash flowing in and out from sales and expenses (operating activities), investments, and financing.
12. Statement of Changes in Equity: statement of changes in equity.

d. **Bookkeeping Reports**:
   i. Account list: the name, type, and balance for each account in your chart of accounts.
   ii. Balance Sheet Comparison: what you own (assets), what you owe (liabilities), and what you invested (equity) compared to last year.
   iii. Balance Sheet: what you own (assets), what you owe (liabilities), and what you invested (equity).
   iv. General Ledger: the beginning balance, transactions, and total for each account in your chart of accounts.
   v. Journal: the debits and credits for each transaction, listed by date.
   vi. Profit and Loss Comparison: your income, expenses, and net income (profit or loss) compared to last year.
   vii. Profit and Loss: your income, expenses, and net income (profit or loss). Also called an income statement.
   viii. Account history: account history
   ix. Recent Transactions: Transactions you created or edited in the last 4 days.
   x. Statement of Cash Flows: cash flowing in and out from sales and expenses (operating activities), investments, and financing.
   xi. Transaction Detail by Account: transactions and total for each account in your chart of accounts.
   xii. Transaction List by Date: A list of all your transactions, ordered by date.
   xiii. Trial Balance: this report summarises the debit and credit balances of each account on your chart of accounts during a period of time.

e. **Sales tax**:
   i. Tax Detail Report: This report lists the transactions that are included in each box on the tax return. The report is based on accrual accounting unless you changed your tax reporting preference to cash basis.
   ii. Tax Liability Report: How much sales tax you’ve collected and how much you owe to tax agencies.
   iii. Tax Summary Report: This report shows you the summary information for each box of the tax return. The report is based on accrual accounting unless you changed your tax reporting preference to cash basis.

f. **Sales and Customers Reports**:

        i. Deposit Detail: your deposits, with the date, customer or supplier, and amount.
        ii. Income by Customer Summary: your income minus your expenses (net income) for each customer.
    g. **Expenses and suppliers**:
        i. Cheque Detail: The checks you've written, with the date, payee, and amount.
    h. **Budgets**:
        i. Budget overview: this report summarises your budgeted account balances.
        ii. Profit and Loss Budget vs Actual: this report shows how well you are meeting your budget. For each type of account, the report compares your budgeted amounts to your actual amounts.
        iii. Profit and loss budget performance: this report compares actual amounts to budgeted amounts for the month, the fiscal year to date, and the annual budget.
    i. **Accounts Aging**:
        i. Accounts Receivable Aging Summary: unpaid balances for each customer, grouped by days past due.
        ii. Accounts Receivable Aging Detail: unpaid invoices, grouped by days past due.
        iii. Accounts Payable Aging Summary: the total amount of your unpaid bills, grouped by days past due.
        iv. Accounts Payable Aging Detail: your unpaid bills, grouped by days past due.

4. Rest API
    a. This module enables you to use **REST API** through your **FAST BUSINESS MANAGEMENT PORTAL**.
    It includes a variety of useful commands in order to control your FAST BUSINESS MANAGEMENT PORTAL installation remotely, through third party applications.

    The **FAST BUSINESS MANAGEMENT PORTAL API** operates over **HTTPS** and uses **JSON** as its data format. The API is a **RESTful API** and utilizes **HTTP methods and HTTP status codes** to specify requests and responses.

    A REST API defines a set of functions which developers can perform requests and receive responses via HTTP protocol such as GET and POST.
    Our item contains a complete documentation – If you are unsure about your coding skills or you do not understand what exactly an API is, feel free to raise a comment with your specific question.
    b. Available action through API
        i. **Customers**
        → Add New Customer
        → Delete a Customer
        → List all Contacts of a Customer
        → Request customer information
        → Search Customer Information
        → Update a Customer
        ii. **Contacts**
        → Add New Contact
        → Delete Contact

→ Request Contact Information
→ Search Contact Information
→ Update Contact Information

iii. **Invoices**
→ Add New invoice
→ Delete invoice
→ Request invoice information
→ Search invoice information
→ Update invoice

iv. **Leads**
→ Add New Lead
→ Delete a Lead
→ Request lead information
→ Search Lead Information
→ Update a lead

v. **Milestones**
→ Add New Milestone
→ Delete a Milestone
→ Request Milestones information
→ Search Milestones Information
→ Update a Milestone

vi. **Projects**
→ Add New Project
→ Delete a Project
→ Request project information
→ Search Project Information
→ Update a project

vii. **Staff**
→ Add New Staff
→ Delete a Staff
→ Request Staff information
→ Search Staff Information
→ Update a Staff

viii. **Tasks**
→ Add New Task
→ Delete a Task
→ Request Task information
→ Search Tasks Information
→ Update a task

ix. **Tickets**
→ Add New Ticket
→ Delete a Ticket
→ Request Ticket information
→ Search Ticket Information
→ Update a ticket

x. **Custom Fields**
→ Add Custom Fields
→ Delete Custom Fields
→ Request Custom Fields
→ Request Values of Custom Fields
→ Search custom field values' information
→ Update Custom Fields

xi. **Estimates**
→ Add New Estimates
→ Delete Estimate
→ Request Estimate information

→ Search Estimate information
→ Update a estimate

xii. **Expense category**
→ Request Expense category

xiii. **Expenses**
→ Add Expense
→ Delete Expense
→ Request Expense information
→ Search Expenses information
→ Update a Expense

xiv. **List Taxes**
→ Request Taxes

Payment Mode
→ Request Payment Modes

xv. **Payments**
→ List all Payments
→ Search Payments Information

xvi. **Proposals**
→ Add New Proposals
→ Delete Proposal
→ Request Proposal information
→ Search proposals information
→ Update a proposal

5. Appointly
   a. **APPOINTLY FITS PERFECTLY FOR ANY TYPE OF APPOINTMENT WITH ABILITY TO INTEGRATE A FORM ON YOU WEBSITE .**
   b. Appointly is a module for **FAST BUSINESS MANAGEMENT PORTAL** that you can **schedule appointments** to your CRM and schedule also from external forms on multiple websites and manage your Appointments with ease, the module is designed for fast creating appointments to ease your communication with your contacts and also you can include staff as attendees, subject, description, date and time and many other features.
   c. Appointly can be connected with **Google Calendar** and **Outlook Calendar** each separate user will be able to login to his own Google or Outlook calendar and directly manage appointments to both calendars, create, update and delete.
   d. Appointly offers users to add request appointment form to any of your websites and clients can directly ask for an appointment.Appointments can be created with a specific start time and location with option to include Internal, External Contact or Lead and also include staff as attendees. The module is flexible with simple nice looking design and easy to use. Offers options as External Form can be embed(added) to any website, Internal, Internal Contact, External Contact, Lead, **Email and SMS Notifications**, Name, Email, Location, Approve Appointment, Cancel Appointment (Reason), Confirm as Finished and many more other features to come.
   e. Appointly also includes extra option **Callbacks** that is new feature in Appointly where external clients or internal can request a callback from your company, because not all clients are located in the same country as we work in. The module also have support for **Recurring Appointments**
   f. Callbacks can be managed from admins or responsible person for callbacks callbacks assignee’s can be assigned to manage an individual callbacks and

take notes. This option can be enabled / disabled per your needs. **Custom Fields, Email Tracking, and Feedback’s** are also available for Appointment from version 1.1.4 which also support live notification and email templates

g. **Google Calendar API (One way Sync)**
h. **Google Meet Integration**
i. **Invite Client and Staff to Google Meet (via email) with custom message**
j. **Outlook Calendar API (One way Sync)**
k. **Past Appointments**
l. **Recurring Appointments**
m. **Request a Callback**
n. **External leads / clients can requests callbacks**
o. **Callbacks assignee’s**
p. **Callbacks notes**
q. **Custom Fields**
r. **Email Tracking**
s. **Convert to task** (can be related to Project, Invoice, Customer, Estimate, Contract, Ticket, Expense, Lead and Proposal)
t. **Convert to lead**
u. **Appointment Feedback’s. Clients with finished appointments can add feedback rating and comment. Staff can request a feedback.**
v. **Embed (iFrame) form to any of your websites (can be added to multiple websites)**
w. **Staff permissions (View-Global, View-Own, Edit, Delete)**
x. **Live push notifications (Reminders, New Appointment, Appointment Cancelled, Request Cancellation, Updated, Feedback notifications, Callbacks notifications)**
y. **Dashboard Widget**
z. **Google Calendar API**
aa. **Today’s Appointments Calendar sync**
bb. **Option to Edit Appointment**
cc. **Option to Delete Appointment**
dd. **Option to Cancel appointment**
ee. **Option set default table filter**
ff. **Option set clients to book appointments logged in or before login**
gg. **Calendar type events**
hh. **Appointment Notes**
ii. **Appointment Types**
jj. **Calendar type color events in staff and clients area**
kk. **Books appointments directly from customers area**
ll. **General appointment view**
mm. **General appointment view separate for external public client url client (hashed and unique)**
nn. **General appointment view separate for internal staff private CRM url attendee**
oo. **Assign Multiple Staff Attendees**
pp. **Internal Appointment (Contacts)**
qq. **Internal Appointment (Leads)**

rr. **External Appointment**
ss. **External iFrame Form (Contact)**
tt. **SMS Notifications and Notification reminders**
uu. **Email Notifications and email reminders**
vv. **Reminder Notifications**
ww. **Send Early Reminder**
xx. **Access Logs**
yy. **Reschedule appointment (Mark as Ongoing)**
zz. **Email Templates**
aaa. Appointment Approved to (Staff and Attendees)
bbb. Appointment Cancelled to (Staff and Attendees)
ccc. Appointment Approved to (Contact)
ddd. Appointment Cancelled to (Contact)
eee. Appointment reminder to (Staff and Attendees)
fff. Appointment reminder to (Contact)
ggg. Callbacks Assigned to (Staff)
hhh. New Callback to (Staff)
iii. Feedback received to (Staff)
jjj. Feedback updated to (Staff)
kkk. **SMS Templates**
lll. **Note: Make sure that all your SMS templates in Setup->Setting->SMS are filled with some content as given in the example below or SMS will not be sent if your SMS template is empty.**
mmm. Appointment Approved to (Contact)
nnn. Appointment Cancelled to (Contact)
ooo. Appointment Reminder to (Contact)
ppp. SMS Action hooks
qqq. **Dashboard Today's Appointments Widget**
rrr. Add today's appointments widget to your dashboard
sss. **All your appointments are shown and synced with your calendar**
ttt. Directly open appointment from calendar
uuu. Calendar colored events
vvv. **Flexible date and time manipulation**
www. Busy hours and dates indicator
xxx. Also available in external form
yyy. **Email and SMS notifications :**
zzz. Send Email and SMS notifications to contact / attendees on creation, approval or editing existing appointment
aaaa. Email Templates for Appointments (translate ready)
bbbb. Custom content and subject
cccc. **Custom Fields**
dddd. Feedback's
eeee. Callbacks
ffff. Custom admin email templates and SMS
gggg. Appointment Confirmation
hhhh. Appointment Cancellation
iv. HTML content via Tiny MCE editor in Email Templates

jjjj. Custom statuses for different status of appointments : pending, approved, cancelled, confirmed, upcoming

kkkk. Template merge fields, in SMS and Email templates

llll. Action Hooks

mmmm. **Table Filters**

i. All
ii. Approved
iii. Not Approved
iv. Cancelled
v. Finished
vi. Upcoming
vii. Missed
viii. Recurring
ix. Lead
x. Internal Staff

nnnn. **Live Search, Live Search Leads**

i. Source: eg. Internal (Contact) / External / Lead (Can be marked as External from Inside CRM or External Contact from any website you added Appointly embed form)
ii. Appointment due date pointers
iii. Appointment busy dates pointers (can be disabled)

oooo. **Responsive Bootstrap Layout**

i. Available languages: **English, German, French, Dutch, Italian, Spanish, Portuguese Brazil and Polish**

pppp. **Translate ready**

6. Assets Management
   a. **Assets Management Module** for FAST BUSINESS MANAGEMENT PORTAL, is a module that provides the ability of managing company's assets inside FAST BUSINESS MANAGEMENT PORTAL's dashboard. You will be able to separate your assets based on groups/locations/units and assign them to staff members. Check the next section of this description, for a complete list with functionality actions.

   b. * The recorded videocast contains visuals using FAST BUSINESS MANAGEMENT PORTAL Flat Admin Theme. Our module will not change the apperance of your admin area.

   c. Create assets (editing/removing it aswell)

   d. Create customer-based Assets, corporate-only assets and mixed ones
   e. Revoke an asset
   f. Add additional assets in existing asset
   g. Assign an asset on a specific staff user
   h. Trasnfer assets between users
   i. Report an asset loss
   j. Report an asset as a broken one
   k. Liquidation record of an asset

l. Warranty record of an asset
m. Allocated Assets list
n. Revoked Assets list
o. Deprecated Assets list
p. Ability to separate assets based on unique units, asset groups and asset locations (listing aswell)
q. Ability to add images to your assets (publicly accessible, through changeable constant for uploadsdir)

r. Please give module's video-preview a quick view, in order to view a sample use-case of the Assets Management module inside FAST BUSINESS MANAGEMENT PORTAL, or try its demo installation (credentials below).

7. Database Backup
    a. Using this module, you can backup database any time but this function available only on purchase package
8. Sales commission
    a. **Commission Program** is most commonly known as the variable component of a total sales compensation package. The total commission earned is dependent on each salesperson's individual goals and their performance.Your commission structure ties a sales rep's performance to the amount of money he or she will take home each paycheck. It's no secret that accountability produces results, and a well-structured commission plan is an excellent way to incentivize top performance.
    Because there's no one size fits all, sales compensation plans come in many shapes and sizes, including: salary/hourly + commission, commission-only, tiered commission, residual commission, and variable-rate commission. Of these, the easiest and most commonly used approach is to pay a certain percentage based on the revenue generated from a single sale. Very simply, a sales rep who closes a deal for $500 with a commission rate of 5% earns $25 per sale.
    Please check out the uploaded screenshots, which demonstrates all visible parts of the module.
9. custom email & sms notifications
    a. Custom SMS & Email module for FAST BUSINESS MANAGEMENT PORTAL allows you to send out custom Emails and SMS to your clients!
    b. Every contact of the selected Customer's (or Lead's) number, will receive the respective notification sent by you, through our module's interface (which can always be a selection from your pre-created templates). Easy as 1-2-3!
10. facebook leads integration
    a. Leads Integration Module for FAST BUSINESS MANAGEMENT PORTAL, is a module that enables you to sync your Leads through your page's forms with FAST BUSINESS MANAGEMENT PORTAL Leads. It uses oAuth connect in order to grant access to your Pages, it allows custom fields to be synced between FAST BUSINESS MANAGEMENT PORTAL and the well-known social network and you can subscribe to multiple pages of yours.
11. file sharing
    a. **File Sharing** is an online file sharing platform that can be used to share multiple files among clients, partners and colleagues. The files can be sent by email or an url that can be shared with everyone you would like to.
    Please check out the uploaded screenshots, which demonstrates all visible parts of the module.
12. Goals
    a. Module for defining goals
13. human resources management
    a. **Human Resources Management module** for FAST BUSINESS MANAGEMENT PORTAL, helps companies save time and manage their Human Resources directly inside their dashboard.
    b. It includes the following HR functions:
        i. → **Staff** management with lots of new available data

ii. → **Contracts** management with lots of available data
iii. → **Insurance** management with lots of available data
iv. → **Shifts** management with lots of available data
v. → **Payroll** management with lots of available data
vi. **Allowances, Job Positions, Workplaces, Salaries, Pay slips etc**

14. HR Records
    a. **HR Records** is a human resource records system. The primary function is to provide a central database containing records for all employees past and present. Human resource records refers to the informational documents utilized by an organisation to carry out its functions. It represents the memory of organisation. The records provide information about the organisation which is maintained in tangible form i.e. written, pictorial, charts etc.
    They are therefore tangible evidence of the activities of the organisation. Personnel records provide information about the position of HR in the organisation e.g. – records relating to training, performance, absenteeism, wages and salary, labour turnover, productivity, morale surveys, job satisfaction, social security, employee welfare etc.
    Please check out the uploaded screenshots, which demonstrates all visible parts of the module.

KEY FEATURES

    b. +

15. idea hub
    a. Idea Hub is a module for FAST BUSINESS MANAGEMENT PORTAL that provides organizations with a better way to access existing system challenges and the opportunity to discover new solutions to these various challenges with ideas that will be provided by the Customer or staff and that would be further analyzed with the help of parameters i.e. rating, likes and dislikes.
    b. Idea Hub module allows staffs can submit new ideas & challanges and develop these for actual solutions.
    c. **What does idea hub compose of?**
        i. The Idea hub has majorly two factors namely – Challenges and Ideas.

ii. **A.**Ideas can have specific comments, description, Image or video cover type, a specific file can be attached to an idea, how it can impact business, goals of the idea, any additional info needed to be provided, its status viz. Active, Inactive, on-hold, in process, review, approved,etc. and stage like initial, under discussion, final, discover. The idea can be visualized in 3 ways namely viz. PUBLIC, PRIVATE and **Custom –Shareable with selected FAST BUSINESS MANAGEMENT PORTAL Customers**

iii. Challenges can be classified under different heads as per the requirement of the business viz. IT design, Mobile application development etc. Challenges can be Listed and viewed in List mode or Grid mode. It can have a description, title, a cover image and Deadline for resolving which can further be represented in status i.e. Active, Inactive and Archive.

d. **Why do we need Idea Hub?**

i. The following "Organization Development Code" illustrates why Idea Hub is a must-have for any modern, knowledgeable organization.

e. **Customer-Driven**

i. Idea hub module sets the company on "customer-centered" thinking. We strive to keep in touch with the client as long as possible, entertain him and build long lasting relationships with him.

f. **Integrity**

i. It is easy to assume that we are missing out on something in the system that we have been using for years. Instead of looking for a new one, which may be associated with a number of problems, e.g. moving large amounts of data or wasting time reading, we can influence the company to introduce modifications to its product in this context. This increases user loyalty and engagement.

g. **Customer Success**

i. The world is well aware of good customer service conditions because they spread across the network like viruses. The Idea Portal provides the organization with a great tool for similar opportunities – giving the client exactly what they need may be the path to widespread success, and the customer acquisition process will be shortened by a series of instructions and constructive feedback from clients.

h. **Long-term Strategy**

i. The Director of Idea hub can also be the person who will put the highest quality information into organizational strategies. With a brief analysis, it will be much easier for him to learn the product spaces and the direction the organization should go. The money saved by market research and customer analysis can be significant and the findings are surprising.

i. **Market needs**

i. Release always on time and always precisely what the market needs. Research shows that often large steps of an organization prove to be unsuccessful. There are many reasons for this – one of them is the fact that the market is not yet ready for a given product or service. There are many cases in which particular products that work perfectly in one market are completely different. Idea Portal allows predicting specific customer needs and the next steps in increasing the quality or expanding the organization's services.

j. **Self-service**

i. At the moment when a potential customer encounters our organization, he will receive a collection of information about the unusual way of customer care and the possibility of influencing the product. We reach out to him.

k. **Real-time information**

i. Clients want to know the progress of their work. Idea Hub Portal provides transparent status information, and in the event of successful action in connection with the idea submitted by the customer receives ongoing information about progress in the form of status of implementation. Work is important in building a sense of security, trust, and control.

I. **Key Concepts**
    i. **Category:**It consists of the diverse category under which challenges Lies .they can be namely : IT Development, IT design, General issues , etc.
    ii. **Stage:**The stage defines Initial, final, Under discussion and Staging phase.
    iii. **Status:**The status can be defined as Active, Inactive, Hold, under discussion, Review and approved.
    iv. Features:-
        1. Create challenges
        2. Edit challenges
        3. Delete challenges
        4. Create Ideas
        5. Edit ideas
        6. Delete ideas
        7. Likes on Ideas
        8. Dis-likes on Ideas
        9. Comments on Ideas
        10. Rates on Ideas
        11. Challanges List View
        12. Challanges Grid View
        13. Ideas Tree View
        14. Ideas Kanban board view
        15. Ideas List View
        16. Ideas Grid View
        17. Filter By Category
        18. Many more

16. Custom javascript
    a. **Custom JavaScript** for FAST BUSINESS MANAGEMENT PORTAL, is a module that allows you to integrate your custom JavaScript code, onto your **Customers Area** and/or **Administration area** of FAST BUSINESS MANAGEMENT PORTAL.
17. lead manager
    a. Lead manager module allowing various calling methods to connect with the FAST BUSINESS MANAGEMENT PORTAL core leads using latest tools. Unlike manual calling and storing data, this module helps to keep information in a better way for communication hence it will help to convert leads in a more efficient way.
    b. Only one account will be needed to manage all staff calls along with call permission management for individual staff to avoid unnecessary calls.
    c. Features:-
        i. Email- Send/receive
        ii. Video call via zoom
        iii. Call via twilio
        iv. Sms
        v. Bulk Sms
        vi. 2-way sms
        vii. SMS, call, zoom and activity log features for FAST BUSINESS MANAGEMENT PORTAL customers
        viii. Notification for missed, busy, no anaswer calls
        ix. Individual audio call landing to assigned staff
        x. Video/Audio call recording
        xi. Soft Phone on full CRM
        xii. One twilio account used Globally for all staff

xiii. Each staff has own twilio numbers
xiv. Each staff has own email SMTP/IMAP setting
xv. Staff Permission for lead manager
xvi. Call Mute functionality
xvii. Add/update Remarks
xviii. View Remarks
xix. Re-direction from lead manager to leads
xx. Activity log for call,sms, recording
xxi. Dashboard
xxii. View all video call Appointments
xxiii. ncoming/outgoing seprate call duration in activity log
xxiv. Incoming/outgoing seprate staff duration in dashboard
xxv. Twilio account balance on Dashboard
xxvi. Total twilio incoming numbers on Dashboard
xxvii. Many More

Well organised Api's document avilable for integration

18. customer loyalty & membership

a. **Customer Loyalty & Memberships Module** lets you loyalize your customers by rewarding them with points. With Customer Loyalty & Memberships, you can efficiently implement a reward system in your store. The loyalty points received by customers are redeemable as offering coupons, discounts on purchases, or other loyalty rewards. Not only that, the points are redeemable to attain the loyalty membership too, and become a part of the brand's loyal members community.

b. What is customer loyalty?

i. Customer loyalty is a customer's willingness to repeatedly return to a company to conduct some type of business due to the delightful and remarkable experiences they have with that brand. One of the main reasons you want to promote customer loyalty is because those customers can help you grow your business faster than your sales and marketing teams.

c. What is a customer loyalty program?

i. A customer loyalty program is a rewards program that a company offers their most-frequent customers to encourage loyalty and long-term business by offering free merchandise, rewards, coupons, or even advance released products.

d. Why is customer loyalty important?

i. Customer loyalty is something all companies should aspire to simply by virtue of their existence: The point of starting a for-profit company is to attract and keep happy customers who buy your products to drive revenue.

ii. . Customers convert and spend more time and money with the brands they're loyal to. These customers also tell their friends and colleagues about those brands, too which drives referral traffic and word-of-mouth marketing.

iii. . Customer loyalty also fosters a strong sense of trust between your brand and customers — when customers choose to frequently return to your company, the value they're getting out of the relationship outweighs the potential benefits they'd get from one of your competitors.

iv. Since we know that it costs more to acquire a new customer than to retain an existing customer, the prospect of mobilizing and activating your loyal customers to recruit new ones — simply by evangelizing a brand – should excite marketers, salespeople, and customer success managers.

e. How to Keep Customers Loyal

i. . Use a simple points-based system.

ii. Use a tier system to reward initial loyalty and encourage more purchases.
iii. Charge an upfront fee for VIP benefits.
iv. Structure non-monetary programs around your customers' values.
v. Make a game out of it.
vi. Scratch the program completely.
vii. Build a useful community for your customers.

f. Key Features of Customer Loyalty & Memberships Module

i. Purchase Products through Points: In this feature, the user can use their points for purchasing the products. It will also display the notification of how many points are required to purchase the products. To use points when making purchases, you need to integrate with the Omni-Channel Sales module
ii. Coupon Generation: The merchants can now send the notification to the users after setting up the number of days prior to the date of expiration for the notification. Also, the merchant can customize the whole message of the Email Template. The user can generate the coupon by converting its total points to coupons and use coupons. Minimum Points Required For Generating Coupon: The admin can set the minimum points count required by the customer to generate the coupon. As soon as the user's points count reaches the minimum required points value then he will be eligible to generate the coupon.
iii. Per Money Spent Points: The user can earn points on every dollar spent and Merchant can set per dollar spent points. Assign Product Points: This feature enables easy assignment of points on the product and assigning points per product category.
iv. Membership Feature: Admin will create different levels of Membership as Premium, Silver, Gold, etc. Each level will be assigned with some loyalty points. Each level has some categories and products of above-selected categories (if no products are selected then all products of selected categories are assigned to that level), some discount (in %).When customers will have sufficient points earned to reach on any level then only that level will be displayed with a select box, and other levels will also be listed in the table. When Customer becomes a member, they will get some offers on selected categories as well as products. Membership Expiration: Admin can set the expiration date for the membership feature.
v. Points Expiration: Merchants can now set the points expiration time period to redeem points by setting a threshold duration for counting the expiration date.
vi. Purchase Product By Redeeming Points: Customers can now redeem points to purchase products by making a partial payment with the amount and partially with points. Custom Conversion: The user can be allowed to convert his chosen points out of his total available points to coupons. To use points when making purchases, you need to integrate with the Omni-Channel Sales module.
vii. Points Log Feature: The customer can view the points earned, redeemed, or coupons on their dashboard by enabling the points-log settings in the membership features section
viii. Redeem Points Conversion: The admin is required to set the points, their corresponding price, and the coupon amount received by the customer on converting each point to coupon price.
ix. Points Table: Lists all the users who have received the points. The admin has the ability to modify user points and delete the user from the table
x. Points log feature: Both admin and customer can see points log details, like on which date and event the customer has got those points.
xi. Redeem directly on Invoice without going through Sales Order of Omni-channel Sales module: you need to add hooks for FAST BUSINESS MANAGEMENT PORTAL, please see details in the document.

19. Mention and Tag

a. **Mention and Tag** for FAST BUSINESS MANAGEMENT PORTAL help you create discussion or support topics, when using @ to mention someone or using # to mention tasks, projects,

invoices, payments, supports, ...
Please check out the uploaded screenshots, which demonstrates all visible parts of the module.

b. Post topics that mention someone and relate to task, project, contract, invoice, payment, support, etc.
c. Comments on topics, on comment can use @ to mention someone or # to mention task, project, invoice, payment, support, ... Use # will also select Contact to discuss with the customer
d. When someone is mentioned will receive a notification and an email.
e. On the Client Portal, customers can discuss and use @mention

20. Menu setup
    a. Default module to setup menu according to your desire
21. Mindmap
    a. Mindmap is a FAST BUSINESS MANAGEMENT PORTAL module that allows its users to visualize ideas process, share and present thoughts by brainstorming. Collaborative mind mapping and brainstorming tool.
    b. This s a msall module that will allow you to visualize your ideas. Mind maps assist the brainstorming phase because you can add ideas without a filter. They provide the perfect opportunity for challenging yourself creatively to put anything and everything you can think of out of your head and into a visual canvas to be examined and refined. As you begin to organize your map, you can delete ideas that don't fit or alter them to more accurately tie to the themes you've identified along the way.
22. multi-page web to lead
    a. Multi-Page Web to Lead Form Module is a fully responsive multi-page PHP working multipurpose ajax form with the necessary required field jQuery validation built on PHP, HTML5/CSS3, jQuery and Ajax. The module is easy to use.

Let us help you split your long forms into multiple steps forms.

Multi-Page Web to Lead Form Module has a very easy to use form builder process which is basically an upgrade of the core FAST BUSINESS MANAGEMENT PORTAL web-to-lead form builder

It is worth noting that this module provides three types of themes:

b. Elegant Theme
c. Classic Theme
d. Standard Theme
e. 100% Responsive & Mobile-Friendly Multi-Step frontend form layout
f. 3 Themes (attractive design)
g. Aesthetics Unique Design
h. Attractive UX Design
i. AJAX enabled (No page reloads, all requests and validations go through AJAX)
j. Extremely Customizable: You can customize any included form to fit your demand
k. Bootstrap Compatible
l. Browser Compatibility
m. Easy integration into your site
n. You can embed your custom html code in the form (Make sure you use single quotes only)

o. Well documentation (easy to follow instructions for setup)
p. and much more!

23. Okr
    a. **OKR (Objectives and Key Results)** is a goal system. It is a simple tool to create alignment and engagement around measurable goals. The big difference from traditional planning methods? OKRs are frequently set, tracked, and re-evaluated – usually quarterly. OKR is a simple, fast-cadence process that engages each team's perspective and creativity.Creating alignment in the organization is one of the main OKR benefits. The goal is to ensure everyone is going in the same direction, with clear priorities, in a constant rhythm. OKR's original concept came from Intel and spread to other Silicon Valley companies. Google adopted OKR in 1999, during its first year. It supported Google's growth from 40 employees to more than 60,000 today.Besides Google, other companies use OKR, including Spotify, Twitter, LinkedIn, and Airbnb. But the OKR system is not only for digital companies. Walmart, Target, The Guardian, Dun and Bradstreet, and ING Bank are also using OKR.
    b. So, as the name implies, OKR has two components, the Objective and the Key Results:
    c. **Objectives** are memorable qualitative descriptions of what you want to achieve. Objectives should be short, inspirational and engaging. An Objective should motivate and challenge the team
    d. **Key Results** are a set of metrics that measure your progress towards the Objective. For each Objective, you should have a set of 2 to 5 Key Results. More than that and no one will remember them.
    e. The main OKR benefits are:
        i. **Agility**: Shorter goal cycles enable faster adjustments and better adaptation to change, increasing innovation and reducing risks and waste.
        ii. **Alignment and cross-functional cooperation**: The use of shared OKRs improves collaboration among different teams, solving interdependencies and unifying competing initiatives.
        iii. **Reduced time for setting goals**: OKR simplicity makes the goal setting process faster and easier, drastically reducing the time and resources spent on setting goals.
        iv. **Clear communication**: Transparency and simplicity enable the team to understand the goals and priorities of the organization as well as how each individual can contribute.
        v. **Employee engagement**: OKR bi-directional approach for goal setting connects the employees with the company's objectives, increasing engagement.
        vi. **Autonomy and accountability**: Teams receive a clear direction and are free to choose how to achieve their OKRs. They become responsible for their objectives, with clear success criteria known to the whole company, creating mutual obligations.
        vii. **Focus and discipline**: The reduced number of goals creates focus in the organization and disciplines efforts and initiatives.
        viii. **Bolder goals**: Decoupling OKRs from compensation and using stretch goals, even partially, enable the team to set bolder, challenging goals.
24. omni-channel sales

a. **Omni Channel Sales Module** is the process of selling your products on more than one sales channel. Multichannel management includes a mix of your own website, client portal, POS and multistores Woocommerce.
b. **Why should I be multichannel selling?** Selling on multiple sales channels increases your exposure to potential customers, which increases your sales opportunities. Online shoppers are either staying loyal to one sales channel (meaning that you'll miss out if you're not there), or they're shopping around (meaning that you'll miss out if you're not on more than one of them).
c. **What are the benefits of multichannel selling?**
    i. Being where your customers shop
    ii. Staying ahead of the competition
    iii. Increasing your touch points
    iv. Reaching new markets
    v. Combining efforts
    vi. Expanding brand recognition
d. **What are the benefits of Omni Channel Sales Module?** Easy – Efficient – Profitable – Manageable
    i. **Listing management**: Create, upload and edit all of your listings in bulk, from one central location – this includes descriptions, images and site-specific data. This saves time, avoids duplication and drastically reduces errors.
    ii. **Order management**: View, track, process, update and download all order information from a central location, as well as creating packing slips, pick lists and invoices. This reduces turnaround times, increasing customer happiness.
    iii. **Inventory management**: Live inventory management syncs your stock levels across all of your sales channels, preventing over-selling, avoiding ring-fencing and satisfying your customers.
    iv. **Shipping**: Omni Channel Sales Module integrates with your shipping carrier to produce shipping labels, invoices and paperwork while simultaneously updating your sales channels; making life easier.
    v. **Reporting and invoicing**: Access and download real-time sales data to keep on track and make informed business decisions. This includes reporting on what's selling best, where, allowing you to be more strategic.

25. Custom dashboards
    a. Customize dashboard according to your demand , setup different dashboard for different users
26. email builder
    a. build your desire email template using already available email templates
27. chat
    a. The module uses **Web sockets** request and not HTTP requests that slows down the server. Specially developed for the employees and clients of FAST BUSINESS MANAGEMENT PORTAL so they can connect and converse with each other.

       Best way to connect and interact with your staff colleagues and connected clients, you can offer communication directly as well as build trust and increase staff loyalty. Offers options to create chat groups, connect with clients, export conversation, delete conversation and even create tickets form clients conversations.
28. Shop

a. **FAST BUSINESS MANAGEMENT PORTAL Shop** module enables the ability to sell your own **Products or Services**, through Customers Area, along with a **Powerful Reporting** and **Inventory Management**.
b. Create a product in seconds
c. **P**oint **O**f **S**ale functionality is also included
d. Users will be able to add your **Products or Services** to their **Cart** and an invoice will be generated for them, once they decide to checkout their cart. Our module integrates two new **email templates** aswell, so staff members and purchasers are aware with the necessary notifications about their orders
e. Non-logged in users will be able to start an order and get redirected to the registration/login page (you will also be able to hide products from non-logged visitors)
f. Quantities are automatically reduced upon orders and advanced reporting exists (**Orders per week / month / year and custom dates**). A **Quantity Report** menu is integrated into FAST BUSINESS MANAGEMENT PORTAL's reporting menu, notifying you about quantity level of your overall products, as per your preffered low quantity number, set in settings.
g. Our module includes a complete **Order History** menu along with activity logging for every purchase and separates the products/services onto categories you create. It uses Bootstrap appearance for the frontend, with emphasis in product images
h. t also supports direct add-to-cart links.
IE: yourdomain.com/products/client/**my_cart?id[]=1** and **automatic redirection after successful registration** for new signups, who used a direct add-to-cart link.

You can also adjust a variety of settings like B2B mode, hidden prices etc:

29. Project Roadmap
    a. **Project Workflow** module provides you advanced reporting for your FAST BUSINESS MANAGEMENT PORTAL Projects, inside admin area.
    It generates usable reports for every project, straight at your dashboard and allows you to filter projects, based on advanced reporting (Milestones, Tasks etc). It works fine with every custom Project status aswell.

30. Purchase
    a. **Purchase Management Module** is a tool for managing your day-to-day purchases. It is packed with all necessary features that are needed by any business, which has to buy raw material for manufacturing or finished good purchases for trading. Purchase Management can enter supplier bills, reconcile with purchase orders or goods receipts, bill charges could be allocated for computation of landed cost of items.
    Please check out the uploaded screenshots, which demonstrates all visible parts of the module.
    b. Manage item list with many extended attributes inherited from FAST BUSINESS MANAGEMENT PORTAL's item: image, item code, barcode, purchase price
    c. Vendor Management: Company info, Contact, Contract, Purchase Order, Payment, Expenses, Note, Attachments
    d. Manage procurement requests of Departments
    e. Manage quotes from Vendors
    f. Manage Purchase Order from Vendors, manage payment progress on this order, support reminders, make notes and attach documents related to this order
    g. Create tasks and assign them to employees on Purchase Quotation and Purchase Order
    h. convert purchase order to expense
    i. Manage contracts of Vendor, support signing similarly to FAST BUSINESS MANAGEMENT PORTAL's sales contracts
    j. Invoice and Payment Management
    k. Reports and charts
    l. Vendor Portal

31. Recruitment

a. **Recruitment Module** for FAST BUSINESS MANAGEMENT PORTAL, is a set of tools designed to automate and manage your organization's recruiting and staffing operations. From posting your jobs to keeping applicants connected and engaged throughout, Recruitment Module lets you manage your entire recruiting process.
Reduce routine tasks such as scheduling interviews by automating your recruitment software and free up your schedule for more pressing activities. Online recruiting management systems create a one-stop application process for job seekers. With the help of an applicant tracking system and candidate relationship management, a recruiter can increase his or her client database and provide an overall better candidate experience.
Please check out the uploaded screenshots, which demonstrates all visible parts of the module.
b. **Create recruitment form**. This module supports you to design the form, on the form you can leave the paragraphs to describe in detail the position of your job, under the paragraph you can design (drag and drop) fields like them. name, age, gender, year of birth, email, phone number, cv file, education, work experience, etc. You can then embed this form on your website or any other website.
c. **Recruitment Portal**
d. **Applicants read job description on the website and submit the application file.** Then their profile will be automatically created in the Candidate Records Management function. When the resume is submitted by the candidate, you have a screen to configure who will receive this information, sorted into which recruitment campaign and in which status
e. **Create job positions and job descriptions**
f. **Create candidate evaluation sets**
g. **List of evaluation criteria**
h. **Candidate evaluation forms**
i. **Create On Boarding Proces**
j. **Create Skills**
k. **Create On Boarding Process**
l. **Create recruiting proposal**
m. **The list of recruitment proposal requirements has filter by department, position and status. See details for information on the right**
n. **Support to directly view attachments**
o. **create recruitment campaigns**
p. **Create candidate profiles**
q. **Detailed candidate profile. You can take care of candidates: exchanging calls, emailing, checking by phone, interviewing by phone. These activities are logged in detail**
r. **Candidate capacity**
s. **Create interview schedule**
t. **Detailed interview schedule**
u. **Evaluation of candidates**
v. **Recruitment statistics**

32. Reminder
    a. **Reminder module allows to send reminders for following**
        i. **Invoice**
        ii. **Estimate**
        iii. **Proposal**
        iv. **Credit Notes**
        v. **Support**
        vi. **Custom Reminder**
        vii. **Custom Services**

viii. Features:-

1. Email Notifications
2. Sms Notifications with twilio
3. Reminders will be send to staff and customers
4. Customised email template
5. status on reminder
6. Reminders comments
7. Reminders Notes
8. Recurring Reminder
9. Export
10. Filter by: Year, Customer, Staff,This month, This Week, Recurring Reminders, include Notified, customer, Related To, Added By.
11. Multi language

b. Note:-

i. Twilio configuration is required for sending SMS
ii. Cron job configuration is required for sending email and message

c. Create Custom services

i. **Step:** Setup->Reminder settings->Reminder services-> Add New service

d. Enable Staff Reminder Trigger SMS in setting

i. **Step:** Setup->Settings->SMS->Staff Reminder(section)->Click on Available merge fields links and copy merge fields and paste text area then save it.

33. Products [Subscription and Invoice]
    a. Allows Customers Subscribe to Stripe subscriptions from customer portal and purchase products using Invoices
34. Manage Custom Statuses
    a. Module will allow to add more statuses to Projects and Tasks
35. export customer details
    a. Module will Generate Report of Customer Profile and its Matrix/Overview.
36. SI Lead Filters
    a. Module will Generate Filters for Lead and save filters as Templates for future use.
    b. "ADVANCED LEAD FILTERS", THIS MODULE CAN BE USE IN FAST BUSINESS MANAGEMENT PORTAL TO EXTENDS ITS LEAD FILTER FUNCTIONALITY.
    c. You can create dynamic filter of your choice & save it for future use.
    (Usage : Mainly use for different kind of report need & at time access inbuilt functionally of FAST BUSINESS MANAGEMENT PORTAL)
    d. It save time of user in generating similar kind of report as once template is save can be used anytime.
    e. ADDED ADVANTAGE:
        i. Can be used to filter Leads.
        ii. Can be select custom period for between start date & due date.
        iii. Lead statuses can be changed from Filtered Table.
        iv. Report can Expert with required Column (i.e. can hide non required Column)
    f. Create a Lead Filter
    g. Leads Summary on Filter
37. Task filters
    a. **Advanced Task Filters** allows you to create dynamic filters on task's level, including any potential reporting you need for your personal or corporate use.
    It allows other staff members to create their own filters aswell, as a step to a more efficient and effective workday/workflow.
38. Advance Spreadsheet online
    a. **Spreadsheet Online Module** is a powerful spreadsheet editor that lets you do pretty much everything you can do with contemporary spreadsheet software like Excel. This module helps you reach your goals and lead you to make better decisions. There's nearly nothing you can't track and manage using this module.
    b. Spreadsheet Editor – Save and manage your precious data with spreadsheets.

   c. **Edit spreadsheets online**: Nothing beats the simplicity of entering data into a table. With this in mind this module provides an online spreadsheet editor which allow users to insert their data into their documents without hassle. You can even apply formulas and calculations to the data just like regular spreadsheets. This module also support drop down list which allows you to display a number of valid options for a specific topic. It's important to keep your users engaged with your content. This can be accomplished by changing styles and customizing the appearance of your documents to make it more attractive for the users to view.
   d. Organize Your Documents – Stay organized and maximize productivity.
      i. **Align your work with your teammates**: Easy retrieval when you need to search for a specific documents. Too many documents at once? Don't worry organize them by projects. If certain documents were misplaced in a project simply move them directly from one project to another. When you create a documents and add a tag to it, it will be automatically categorized under that specific tag. This will save you time and effort on categorizing each documents after creation.
   e. Sharing – Share your work and consolidate with others.
   f. **Align Work with Your Teammates**: When the work is ready it's time to share it with the world. This module supports webpage embed code and you can also export or import data records from MS Excel.
   g. Team Collaboration – Teamwork is a key factor when it comes to success.
   h. **Safely Stored on Cloud Repository**: This module makes it easy to gain access to your documents through the team. Team members can edit the documents remotely and save them directly to Cloud Repository. This module gives your team members the ability to access important documents anywhere, at anytime. Unlimited projects and users can provide a more efficient arrangement for the team. This allows the team to run at its full capacity and fulfill its full potentials.
   i. Folder tree
   j. Create spreadsheet file
   k. import or Export from MS Excel
   l. Sharing
   m. Integration with objects in FAST BUSINESS MANAGEMENT PORTAL: contract, proposal, estimate, project, invoice, expense and lead.
   n. Integration with Client portal
39. Supplier
   a. Supplier relationship management is the discipline of strategically planning for, and managing, all interactions with third-party organizations that supply goods and/or services to an organization the objective of SM is to maximize the value of those interactions. Know your supply chain, know your risk, build relationships and partners to conduct business transactions. Use Supplier module to build a list of suppliers all in FAST BUSINESS MANAGEMENT PORTAL.
   b. Please note the Request for Proposal is a separate module, however, we do give this module away free if our customers leave a positive review. Just email us after and we will send you the module via email.
   c. Stay on top of business and manage your supplier's relationships, all from FAST BUSINESS MANAGEMENT PORTAL.
   d. Assign suppliers to specific staffs of your team and let them manage the relationship.
   e. Allow suppliers to collaborator in the supplier portal
   f. Make notes, statements, invoices, Credit note, estimate, tickets, contracts, projects, task
40. AIO Support Contact Module
   a. Support contact module for FAST BUSINESS MANAGEMENT PORTAL
41. Surveys
   a. module for sending surveys
42. Task bookmarks

a. **Tasks Bookmark module** for FAST BUSINESS MANAGEMENT PORTAL, helps you categorize your tasks in Bookmark lists, so they can be easily grouped/searched and prioritized.
b. **Here's how it works:**
   i. Once module is activated, a new menu item will appear at the right column of your FAST BUSINESS MANAGEMENT PORTAL admin area, named **TASK BOOKMARKS**
   ii. Clicking on it, will lead on Tasks Bookmark creation page, where you will be able to create a new bookmark:
   iii. Create your first bookmark, by adding a name, an icon and a color for it
   iv. Every bookmark that you create will be listed near every task, in a new column, so you can easily append a task to i
   v. You will also be able to pin this bookmark onto Dashboard, so all of its items are visible in the main screen
   vi. and of course, sort all tasks by Bookmark

43. Team Password
   a. **Team Password Module** is a self-hosted team password manager for companies to share passwords with there teams or clients. Each password will be encrypted and can be shared, secured by an advanced access control system.
   b. Own Dashboard
   c. The easiest and safest way to share passwords, credit cards, email, server, software license and more, with the people that matter most. Go ahead, forget your passwords – Team Password Module remembers them all for you.
   d. Make it easy for your team to store, generate and share strong passwords. The less time you need to spend dealing with hacks, phishing scams, and lost passwords, the better.
   e. Share critical passwords with your colleagues and clients without worries. Use one of two sharing permissions to grant varying levels of access to different individuals or teams.
   f. integrating Team password with Contract and Project
   g. Category Management (Support hierarchical organization)
   h. Client portal
   i. Set up email templates for customers
   j. Detailed statistics
   k. All your password are stored AES-256 encrypted in the database
44. Telegram
   a. Telegram is a freeware, cross-platform, cloud-based instant messaging software and application service. The service also provides end-to-end encrypted video calling, VoIP, file sharing and several other features.
45. Timesheet Attendance
   a. **Timesheets & Leave module** is a complete online time and attendance solution for employee time tracking, project time tracking, leave management and shift planning.

   b. **Track your time easily and efficiently:** Track working hours instantly and accurately. One click is all it takes to start, pause or end time tracking. Gain a live view of employee attendance along with any tasks your employees are working on through the live status overview. Automatically calculate working hours on the basis of actual working hours and breaks. This module tracks worked hours at your convenience.

   c. **Efficient staff holiday planner:** Manage holiday entitlements and absences online, no matter your location. This module automatically calculates employee holiday entitlement balance as well as the valid overtime balance on the basis of your settings. You and your employees have always access to the current status of the balances. No more paperwork, online requests for leave days and other absences operate via workflows and guarantee an easy and transparent management of absences.

d. **Easy tracking of all absences:** Define and track different types of absences such as holidays, comp time, or sickness absence. Get an overview of planned absences and employee absence status.

e. **Define approval workflows:** Employees can easily request leave days and other absences online. The responsible manager automatically receives a notification and decides on whether she wants to approve or decline the request depending on the availability of resources and the current status of the balances. The employee automatically receives a notification about the approval or rejection of the request. Additionally, there is the possibility of a two-stage or three-stage approval workflow. Do you want to make sure that leave requests and other absences are processed promptly, even if the managers responsible for approval are absent? Simply define a substitute manager. If the manager responsible is absent, substitute managers automatically receive the requests and process them. When the absence ends, responsibility is automatically deactivated. Thus, no request remains unprocessed.

f. **Easy shift planner:** Allocate employees to daily or weekly shift plans. Quickly react to any changes and reschedule your employees' shifts. Keep an overview of all shifts or review all created shifts by date, location, allocated employees and tasks. Keep track of employee hours.

g. **Effectively plan and manage shifts:** Define working departments, locations, tasks, and working days and create shift templates for future use. Choose the number of employees you need for this particular shift and allocate available employees to a shift with just a few clicks. In case of changes in employee availability you can easily edit created shifts. Shifts which you would like to use repeatedly can be easily saved as shift templates and are, thus, available to you for future use

h. Set up annual leave, holidays, approval process and timesheet method. Many steps can be created in the approval process. There are two ways of timesheet: through the Task timesheet or manual Check-in/Check-out
i. Manage work shift lists. Each shift has a working start and end time, and a break start and end time
j. Manage work shifts. Apply to department, role or to a few specific employees. Has a validity period. The cycle consists of 2 types: repeated weekly or according to a specific period of time. Each day can have different work shifts
k. The details of the work shift
l. Leave Management: Leave (Annual leave, Maternity leave, Private work without pay), Late & Early, Go out, Business trip, Additional Work Hours
m. Attendance Management. There are five ways to take attendance
n. CHECK IN/OUT MANUALLY
o. PROJECT/TASK TIMESHEETS
p. GEOGRAPHICAL LOCATION. To use this feature you need to run on https and when the staffs take the attendance, use it on the mobile device to get the exact GPS locations. To enable

attendance via geo location: Settings -> Settings -> Allow attendance by coordinates.
– Workplace management

q. Assign staff to workplaces
r. Check in/out with geo location
s. DATA FILE with check in/out time. These files can be exported from attendance devices
t. WORK ROUTES. To use this feature you need to run on https and when the staffs take the attendance, use it on the mobile device to get the exact GPS locations
   – Route point management
u. Route planner
v. Route maps
w. Check in/out with geo location
x. Report and Statistic

46. Inventory management
    a. **nventory Management Module** is a tool that allows you to track goods across your business's supply chain. It optimizes the entire spectrum spanning from order placement with your vendor to order delivery to your customer, mapping the complete journey of a product. Through accurate tracking of goods, businesses can minimize waste, analyze trends, and make better investment decisions.
       Core benefit:

    b. **Centralized Storage**: The more stock locations you have to manage, the more difficult it becomes to manage orders and track the stock availability. With inventory management module, you are able to find out the availability of your items and find their location in just seconds, even if they are put in different warehouses or stores
    c. **Stock Control**: Stock control is an effort carried out by a company in providing stock items needed to meet consumer demand. Inventory management module allows you to keep up with your stock availability and ensure it is always at an adequate level. The system gives a notification when the inventory is running low so you can immediately re-order.
    d. **Increased Efficiency**: With inventory management module, all the complex activities in inventory management are made simpler. Monthly to annual inventory reports can be generated in seconds.
    e. **Improved Productivity**: Since various tasks are automated, your employees can focus more on other crucial tasks. They no longer need to be stuck in time-consuming tasks, such as stock-taking or reporting with spreadsheets.
    f. **Minimized Costs**: Inventory management module keeps your company away from financial losses due to human errors, excessive stock storage, unnecessary purchases, late deliveries, and so on. With a centralized and integrated system, you don't need to spend extra money on additional systems to manage your inventory.
    g. **Satisfied Customers**: Inventory management module ensures that all customer orders are fulfilled properly through real time information related to your inventory levels. The system also allows you to track the shipments until they're received by customers. So that in the end, this system helps increase customer satisfaction with your services.
    h. **Accurate Planning & Forecasting**: An inventory management solution helps you become more proactive when planning and forecasting your inventory needs. With complete and accurate inventory reports, you can find out which

products are the most popular, which ones are rarely ordered by consumers, how much inventory you should carry in the next few months, which suppliers are most profitable, and any other important information that helps improve productivity of your business.

i. Manage the list of attributes of goods (type, group, sub group, unit, color, body, size, style), declare the warehouse, the minimum inventory rules of each type of goods.
j. Set the profit rate, the profit rate that can be applied on each item. From the profit rate, the selling price can be calculated in two ways: according to the profit margin of the buying price or the profit margin of the selling price. Support rounding the value of the sale price. Support to automatically create inventory when having Purchase Order or create delivery receipt when sales invoice is available.
k. Manage goods, support sorting by warehouses, by expiry date. Having a mechanism to warn goods that are expired or below the minimum inventory. Each item has extended attributes inherited from FAST BUSINESS MANAGEMENT PORTAL's item.
l. In detail of each goods, it is possible to see details of which warehouses are still in stock with the quantity, the number of expired items (if any), the history of import, export and adjustment in the warehouse.
m. mport goods into the warehouse
n. Export goods from the warehouse
o. Link inventory notes with invoices
p. Adjust the quantity in stock or report the loss of goods
q. Import and export internal warehouse
r. View the entire warehouse transaction history
s. Reports on import, export and inventory of goods in stock, and reports on the value of current goods in stock
t. Analyze current inventory value. Based on the profit ratio of each item, the purchase price and the selling price in the period will calculate the profit rate of the current inventory value of each item. From there, we will analyze the difference between these 2 profit ratios to develop trade discount programs for customer development.

47. WhatsApp Chat
    a. WhatsApp chat module for FAST BUSINESS MANAGEMENT PORTAL
48. WhiteBoard
    a. Module to draw WhiteBoard
49. WooCommerce module
    a. **WooCommerce module** for FAST BUSINESS MANAGEMENT PORTAL is a module that enables you to view and manage your WooCommerce store from FAST BUSINESS MANAGEMENT PORTAL.
    b. You'll be able to :
    c. View all Orders
    d. View summary of Orders
    e. Update Orders status
    f. delete Orders
    g. view Orders data
    h. Edit Products
    i. delete products
    j. add WC Products as sales items inFAST BUSINESS MANAGEMENT PORTAL
    k. View all Customers
    l. edit Customers
    m. delete Customers
    n. View summary of Customers
    o. Add woocommerce Customer to FAST BUSINESS MANAGEMENT PORTAL
    p. Invoice WooCommerce orders in FAST BUSINESS MANAGEMENT PORTAL

q. Restrict staff access to view/manage stores from FAST BUSINESS MANAGEMENT PORTAL
r. Add an unlimited number of stores
s. Assign Stores to Staff
t. edit/delete individual stores
u. View products by store
v. filter Products by status
w. filter Products by type
x. View Customers by stores
y. View products by stores
z. filter Orders by status
aa. Multisite WordPress support

50. Zilla page
    a. module for create Landing pages and get leads
51. ZOOM Meeting
    a. Single Zoom global account that can be used by all staff and Admin member to create zoom meetings Other Supported Features
    b. Admin Features
        i. Admin can create meetings
        ii. Admin can give view permission to staff to view meeting list.
        iii. Customer being notified by email invite
        iv. Staff being notified about meeting via email and Prefex notification
    c. Customer UI
        i. Customers can add their own zoom account
        ii. Customers can see the list of zoom meetings
    d. StaffUI
        i. Can view a list of meetings generated by Admin
52. 10 More different Design and Payment Gateways Modules also included

PARTEIS

PARTY NAME	PARTY
FAST IT VILLAGE	Developer
Uzair Marvel Marketing Pvt Ltd	Client

OPERATING SYSTEM REQUIRMENR

REQUIREMENT	DESCRIPTION
OS (window , Linux , Unix , Macintosh , Android)	Minimum latest version (Browser base)
PC	Core to do or later 4GB RAM DDR 4
Internet	for software activation and use

DOMAIN NAME WITH CHARGES

DOMAIN	CHARGES
.com	3000/Year
.pk	3500/Two Years

TRAINING

FAST IT VILLAGE will then run a five-hour training session with Client employees, showing them how to use the Software this can be done at meeting or online

FEE SCHEDULE AND TERMS

PAYMENTS

If Client wishes FAST IT VILLAGE to go forward with the project, here is the schedule for payments of the fee:

1- 100% due upon acceptance of the proposal before work commences setup fee
2- 100% android fee if needed

FAST IT VILLAGE will launch the software when requested, providing that there is no balance due.

TERMS AND CONDITIONS

1- Payment not refundable at any cost in any case.
2- FIV not Responsible for any misuse of software by client or client employee.
3- Android or IOs account should be provided by client if needed
4- If client want to use sms service, they should purchase services from FIV. SMS services cost not included in this contract.

5- FIV not responsible for any kind of data loss or recovery in case of Personal or Self Hosted Server Usage.
6- Minor updates are free only.
7- If client want more development, which is not mention in contract, then client must pay as per development.
8- Software can auto close if monthly payment not received Till 10th of every month. If there is any issue you can contact to FAST IT VILLAGE representative.

NEXT STEPS

To proceed with this project, client is required to take the following steps:

1- Accept the proposal "as is" or discuss desired changes. Please note that changes to the scope of the project can be made at any time, but additional charges may apply.
2- Finalize and sign contract.
3- Submit initial payment of 100% of total project fee
4- All required document willing be provided as per our demand

Once these steps have been completed, we will begin the setup of server and application.

TIMEFRAME

A comfortable timeframe from quote acceptance to go-live would be about 5 to 7 working days. Timeframes are flexible though, so we can work through the detail to align expectations. An approximate breakdown of time would be:

- Time start after acceptance and deposit paid
- In case of Extra demands (new Module Development) Time Can be increase
- We work 5 days in a weak