

CENTRALIZED CRM SYSTEM STRUCTURE

Exhibition, Reporting & Team Management CRM

1. PROJECT OVERVIEW

Project Name

Centralized Exhibition CRM System

Objective

To build a centralized CRM platform where Admins, Managers, and Employees can manage exhibitions, reporting, team activities, attendance, follow-ups, and analytics from a single dashboard.

The system should help management track:

- Upcoming exhibitions
- Daily operations
- Pending reporting
- Team activities
- Attendance
- Follow-ups
- Location-wise performance
- Operational alerts & reminders

2. USER ROLES & ACCESS CONTROL

A. SUPER ADMIN

Permissions

- Full system access
- Manage all users
- Create exhibitions/events
- View all reports
- Access analytics
- Manage settings
- View all branches/locations
- Monitor overall operations

B. MANAGER

Permissions

- Manage assigned exhibitions
- Assign employees
- Track team reporting
- Approve/reject reports
- Monitor attendance
- Handle follow-ups
- View operational dashboard
- Manage tasks

C. EMPLOYEE / REPRESENTATIVE

Permissions

- View assigned exhibitions
- Submit reports
- Upload images/documents
- Check-in/check-out
- View assigned tasks
- Update activity status

3. MAIN SYSTEM MODULES

MODULE 1: AUTHENTICATION & USER MANAGEMENT

Features

- Login/Logout
- Role-based access
- Forgot Password
- OTP/Email Verification
- Session Management
- User permissions
- Profile management

MODULE 2: CENTRALIZED DASHBOARD MODULE

Objective

One centralized dashboard with different role-based views.

Admin Dashboard Widgets

- Total Exhibitions
- Today's Exhibitions
- Upcoming Exhibitions
- Pending Reports
- Completed Reports

- Active Employees
- Attendance Summary
- Notifications
- Performance Graphs
- Location-wise Activities
- Daily Operations Summary

Manager Dashboard Widgets

- Assigned Exhibitions
- Team Reporting Status
- Pending Reports
- Attendance Overview
- Follow-up Tasks
- Daily Operations
- Employee Activity
- Quick Actions

Employee Dashboard Widgets

- Today's Tasks
- Assigned Exhibitions
- Pending Reports
- Attendance Status
- Notifications
- Check-in/Check-out Button

MODULE 3: EXHIBITION MANAGEMENT MODULE

Features

- Create/Edit/Delete Exhibition
- Assign Manager
- Assign Employees
- Add Venue Information
- Add Client Information
- Add Schedule
- Add Instructions/Notes
- Exhibition Status Tracking

Exhibition Status

- Upcoming
- Ongoing
- Completed
- Cancelled

Exhibition Details

- Exhibition Name
- Client Name
- Location
- Venue Address
- Start Date
- End Date
- Assigned Team
- Notes/Instructions

MODULE 4: DAILY OPERATIONS DASHBOARD

Objective

To monitor all exhibitions and operational activities date-wise from one screen.

Features

- Today's Exhibitions
- Tomorrow's Exhibitions
- Live Reporting Status
- Pending Report Collection
- Missed Reporting Tracking
- Location-wise Monitoring
- Daily Operational Summary

MODULE 5: REPORTING MANAGEMENT MODULE

Features

- Daily Report Submission
- Sales Reporting
- Visitor Tracking
- Lead Collection
- Photo Upload
- Document Upload
- Report Approval Workflow

MODULE 6: REPORT COLLECTION TRACKER

Objective

To track pending and completed reports from all exhibitions.

Features

- Exhibition-wise Report Tracking
- Employee-wise Reporting Status
- Delayed Submission Alerts
- Completion Percentage
- Overdue Reports Monitoring

MODULE 7: ATTENDANCE & GPS TRACKING

Features

- Mobile Check-in/Check-out
- GPS Location Capture
- Attendance Logs
- Late Check-in Alerts
- Shift Tracking

MODULE 8 : TASK & FOLLOW-UP MANAGEMENT

Features

- Assign Tasks
- Follow-up Tracking
- Reminder Notifications
- Deadline Management
- Priority Status
- Escalation Tracking

MODULE 9: SMART CALENDAR & SCHEDULING

Features

- Monthly Calendar View
- Daily Operations View
- Exhibition Timeline
- Reminder Scheduling
- Reporting Deadlines
- Event Notifications

MODULE 10: MULTI-LOCATION OPERATIONS MONITORING

Objective

To monitor exhibitions happening across multiple cities and locations.

Features

- City-wise Tracking
- Branch-wise Monitoring
- Regional Manager Access
- Location-based Analytics
- Multi-location Attendance Tracking

Filters

- City
- Region
- State
- Exhibition Type

MODULE 11: NOTIFICATION SYSTEM

Features

- Push Notifications
- Email Notifications
- WhatsApp Alerts
- Reminder System
- Real-time Alerts
- Escalation Notifications

MODULE 12: REAL-TIME ESCALATION SYSTEM

Escalation Workflow

Employee Missed Report

↓

Reminder Sent

↓

Manager Alerted

↓

Admin Escalation

Features

- Auto Escalation
- Late Submission Alerts
- Operational Alerts
- Missed Check-in Alerts

MODULE 13: QUICK ACTIONS PANEL

Quick Action Buttons

- Collect Pending Reports
- Send Reminder
- Call Employee
- Approve Reports
- Assign Task
- Create Exhibition
- Mark Attendance

MODULE 14: REPORTING DEADLINE MANAGEMENT

Features

- Reporting Deadlines
- Auto Reminder System
- Overdue Report Tracking
- Deadline Analytics
- Escalation Workflow

Example Rules

- Report deadline → 10 PM
- Reminder → 8 PM
- Escalation after missed deadline

MODULE 15: ANALYTICS & REPORTING

Analytics Dashboard

- Exhibition Performance
- Sales Performance
- Employee Performance
- Lead Conversion
- Attendance Analytics

MODULE 16: CLIENT MANAGEMENT MODULE

Features

- Client Database
- Contact Information
- Client History
- Follow-up Notes
- Communication Logs
- Exhibition History

MODULE 17: CENTRALIZED DAILY SUMMARY SYSTEM

Features

- Daily Operations Summary
- Total Exhibitions Conducted
- Reports Submitted
- Pending Reports
- Attendance Summary
- Sales & Leads Summary
- Missed Activities
- Follow-up Tasks

4. DASHBOARD UI STRUCTURE

LEFT SIDEBAR MENU

- Dashboard
- Exhibitions
- Daily Operations
- Reports
- Report Tracker
- Attendance
- Tasks
- Employees
- Clients
- Calendar
- Notifications
- Analytics
- Settings

TOP NAVBAR

- Search Bar
- Notifications Icon
- Calendar
- Profile Dropdown
- Role Switch

5. AUTOMATION FEATURES

Automated Processes

- Auto reminders before exhibition
- Auto report deadline notifications
- Auto escalation for pending reports
- Daily summary reports
- Attendance alerts
- Scheduled notifications
- Auto follow-up reminders

