Fuse Digital Documentation

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Purpose of the Application

Fuse Digital is a platform built on the fundamental principles of a CRM system, offering a flexible and adaptable tool for any team or department. Designed to simplify workflows, Fuse Digital caters to the needs of both client project management and the coordination of internal company operations.

The platform enables the organization of projects into dedicated spaces, efficient task management, and provides clear tracking of everyone's activities. Additionally, it offers management teams an overview of leads, deals, and client interactions while integrating HR information and monitoring the time allocated to each project. In short, Fuse Digital enhances productivity and supports scalable results for any company.

Access to the Application

To test the functionalities of the Fuse Digital platform, we provide two demo accounts that you can use to log in. This allows you to explore the CRM, HR, Finance, Time Tracking modules, and other available features.

Available Accounts

1. **Administrator**
    - Email: **demoadmin@digitalassets.ro**

- Password: **Demous!dapass21**

2. **Standard User**
    - Email: **demouser@digitalassets.ro**
    - Password: **Demous!dapass21**

Login Steps

1. Open the login page of the Fuse Digital application.
2. Enter one of the email addresses listed above.
3. Enter the corresponding password.
4. Click the **"Login"** button.

Once logged in, you will have access to the application's features based on the type of account used. The **Administrator** account provides access to all modules and advanced settings, while the **Standard User** account has limited access according to the assigned role.

Module

CRM

The CRM module in Fuse Digital provides a comprehensive framework for managing the entire sales and customer relationship lifecycle. It covers everything from initial opportunities (**Leads**) to converting them into concrete agreements (**Deals**), organizing them under entity types such as **Accounts**, and ultimately managing associated **Contacts**.

The application interface is designed to present information in an accessible and user-friendly manner, with features that enable sales, marketing, and account management teams to track and update data in real time. This ensures seamless coordination and enhanced productivity across departments.

Leads

General Description:

- **Leads represent the initial source of all business opportunities. A lead can be a potential client, partner, or contact that, through interaction and qualification, may become an active client.**
- **The Leads interface displays a table with columns such as: Name, Company, Phone, Email, Lead Source, and Status.**
- **Possible lead statuses include:**
    - DEAL
    - DEAD

- PROSPECT
- TODAY
  Each status is color-coded for quick visual recognition of its stage.

Key Features:

1. **Search and Filter:**
   - At the top of the section, there is a Search field that allows users to quickly locate a lead by name or keyword.
   - A Filter button enables users to display leads with specific statuses, helping them focus on relevant opportunities.
2. **Total and Today Leads Counter:**
   - **Above the table, two indicators display:**
     - The total number of leads.
     - The number of leads added or updated today.
   - **These metrics help monitor daily progress and assess the effectiveness of lead generation efforts.**
3. **Add a New Lead:**
   - **Clicking the + New Lead button opens a form to input lead details, such as:**
     - Name (Name of the lead or potential opportunity).
     - Company Name (Associated company).
     - Contact Person (Point of contact in the company).
     - Role (Contact person's role).
     - Phone (Phone number).
     - Email (Email address).
     - Lead Source (Source of the lead, e.g., cold calling, networking, referrals, etc.).
     - Status (Current status of the lead, selectable via a dropdown menu).
     - Comments (Additional notes).
   - **After filling in the information, clicking SAVE stores the data, and the lead is added to the list.**
4. **Quick Edit and Status Updates:**

- **Each lead entry includes icons for quick data edits (e.g., changing the phone number or email) without navigating to a separate page.**
- **Clicking the status (distinctly color-coded) opens a contextual menu to quickly update it. For example:**
  - If a lead is marked as DEAL, the system automatically initiates the process of creating a deal**.**

Integration with Other Submodules:

1. **Status Transition to Deals:**
   - When a lead's status changes to DEAL, its information is automatically transferred to the Deals section, facilitating negotiations and deal closures.
2. **Automatic Account Creation:**
   - Leads that progress to DEAL and are later marked as WON can trigger the automatic creation of an Account, formalizing the relationship with the new client.

This streamlined process ensures that leads evolve naturally through the CRM pipeline while maintaining a clear record of all interactions and updates.

Deals

General Description:

- **Leads** represent the initial source of all business opportunities. A lead can be a potential client, partner, or contact that, through interaction and qualification, may become an active client.
- The **Leads** interface displays a table with columns such as: **Name**, **Company**, **Phone**, **Email**, **Lead Source**, and **Status**.
- Possible lead statuses include:
  - **DEAL**
  - **DEAD**
  - **PROSPECT**
  - **TODAY**
    Each status is color-coded for quick visual recognition of its stage.

Key Features:

1. **Search and Filter:**

- At the top of the section, there is a **Search** field that allows users to quickly locate a lead by name or keyword.
- A **Filter** button enables users to display leads with specific statuses, helping them focus on relevant opportunities.

2. **Total and Today Leads Counter:**
    - Above the table, two indicators display:
        - The **total number of leads**.
        - The number of leads **added or updated today**.
    - These metrics help monitor daily progress and assess the effectiveness of lead generation efforts.
3. **Add a New Lead:**
    - Clicking the **+ New Lead** button opens a form to input lead details, such as:
        - **Name** (Name of the lead or potential opportunity).
        - **Company Name** (Associated company).
        - **Contact Person** (Point of contact in the company).
        - **Role** (Contact person's role).
        - **Phone** (Phone number).
        - **Email** (Email address).
        - **Lead Source** (Source of the lead, e.g., cold calling, networking, referrals, etc.).
        - **Status** (Current status of the lead, selectable via a dropdown menu).
        - **Comments** (Additional notes).
    - After filling in the information, clicking **SAVE** stores the data, and the lead is added to the list.
4. **Quick Edit and Status Updates:**
    - Each lead entry includes icons for quick data edits (e.g., changing the phone number or email) without navigating to a separate page.
    - Clicking the status (distinctly color-coded) opens a contextual menu to quickly update it. For example:
        - If a lead is marked as **DEAL**, the system automatically initiates the process of creating a deal.

Integration with Other Submodules:

1. **Status Transition to Deals:**
    - When a lead's status changes to **DEAL**, its information is automatically transferred to the **Deals** section, facilitating negotiations and deal closures.
2. **Automatic Account Creation:**
    - Leads that progress to **DEAL** and are later marked as **WON** can trigger the automatic creation of an **Account**, formalizing the relationship with the new client.

This streamlined process ensures that leads evolve naturally through the CRM pipeline while maintaining a clear record of all interactions and updates.

Accounts

General Description:

- The **Accounts** submodule consolidates the relationship with a client after successfully closing a deal. This section organizes client information, the account manager, offered services, expectations, and planned activities.
- The interface displays lists of existing accounts with a **search bar** for quickly locating accounts by name.
- Filtering options, such as displaying only **Inactive accounts**, provide flexibility in managing account visibility.

Key Features:

1. **Creating an Account:**
    - When a deal is marked as **Won** and no associated account exists, the system automatically triggers the account creation process.
    - The **New Account** form includes:
        - **Client Name** (The name of the client).
        - **Deal** (Selection of the associated deal from the CRM).
        - **Account Manager** (Selection of a user within the application responsible for managing the client relationship).
        - **Footprint Overview** (A section to detail general results, activities, and any other useful information about the client).
        - **Services and Expectations** (A section dedicated to configuring offered services such as SEO, PPC, SMM, Development, and outlining the client’s expectations).

        - Each service (SEO, PPC, etc.) can be defined and applied, allowing for the creation of customized packages.
    - After filling in the required fields, clicking **Create** saves the new account, which is then added to the accounts list.

2. **Client Data Management:**
    - Once an account is created, it centralizes all information about the client, including:
        - Associated deals.
        - Past and future activities.
        - Involved contacts.
    - The account allows for updating information, changing the **account manager**, or adjusting the offered services as the collaboration evolves.

3. **Access to Collaboration History:**
    - Within an account, all associated deals are displayed, providing a complete understanding of the client relationship.
    - This view allows the team to access the history of communications, negotiations, and agreements, enabling a comprehensive understanding of client interactions.

Contacts

General Description:

- The **Contacts** submodule manages individual people associated with a lead, deal, or account. It creates an internal database of relevant individuals such as partners, decision-makers, technical contacts, and other key stakeholders from collaborating companies.

Key Features:

1. **Automatic Data Transfer:**
    - The primary contact person and phone number entered at the **Leads** stage can be automatically transferred to the **Contacts** submodule. This ensures continuity of information and eliminates the need for repeated manual entry.

2. **Adding New Contacts:**
    - Clicking the **+ New contact** button opens a form to input:
        - **Name** (Name of the contact person).
        - **Company Name** (Associates the contact with an existing account).

        - **Role** (The role of the person in the company, e.g., Sales Director, CEO, Admin).
        - **Phone** (Phone number of the contact).
        - **Email** (Email address of the contact).
    - After clicking **Create new contact**, the contact is saved and appears in the list, ready for further management.

3. **Search and Management:**
    - Similar to other sections, a **Search** field is available to quickly find a specific contact by name or other details.
    - Users can navigate through an extended list of contacts to retrieve necessary details, update contact information, or add additional comments.

Integration with Accounts and Deals:

- Contacts are directly linked to **Accounts** and **Deals** to maintain consistency across the CRM workflow. For example:
    - When a lead progresses to a deal and subsequently becomes an account, associated contacts are automatically centralized under the corresponding account.
    - This linkage ensures a comprehensive view of the client relationship, including all stakeholders and relevant parties.

Benefits and Notes:

- The complete **CRM workflow** in Fuse Digital tracks the transformation of a potential contact (**Lead**) into a concrete opportunity (**Deal**), then into an active client (**Account**), while maintaining clear records of associated individuals (**Contacts**).
- Features like **searching, filtering, inline editing**, and both manual and automatic record creation make managing client relationships seamless.
- Contextual menus for quick updates and status changes enhance usability, allowing teams to manage client interactions efficiently.

This submodule ensures that all relevant contact information is readily available, contributing to streamlined communication and collaboration throughout the client lifecycle.

Projects and Tasks

The **Projects and Tasks** module in Fuse Digital is a core component of the platform, extending the flow of information from basic client relationship management (**Accounts**) and sales opportunities (**Deals**) to the internal management of activities. The module is built on the following logic: an **account (client)** serves

as the foundation, from which **projects** are created, and these projects are further divided into **individual tasks**, each aimed at achieving a specific goal or deliverable.

Projects

Context and Role:
Projects are entities that bring together all activities required to deliver services or products to a specific client (**account**). A project can be assigned to one or more departments, have associated users, a set priority, and a due date. These projects serve as the "umbrella" under which tasks are created and managed.

Main Project Interface (Kanban Board Style):

The main page of the **Projects** module is organized into columns that reflect the general status of the projects:

- **To Do:** Newly created projects or those prepared to be started.
- **In Progress:** Projects actively being worked on by the team.
- **Completed:** Projects that have been successfully finalized.
- **Inactive:** Projects marked as inactive function as a historical archive for future reference and are no longer in progress.

Above the Kanban board, there is a **search bar** that allows for quick filtering by keywords and a **Filter** button offering advanced sorting and display criteria:

- **Priority:** Display projects with a specific priority (e.g., Low, Medium, High).
- **Members:** Filter projects by assigned users to see who is working on what.
- **Due Date:** Highlight projects based on their deadline.
- **Client (Account):** Select projects associated with a particular client.
- **Status:** Display only projects marked as To Do, In Progress, Completed, or Inactive.
- **Tags:** Use tags (e.g., PPC, SMM, Development) for additional project classification.

Creating and Editing a Project:

By clicking the **“+”** button in the desired column (e.g., in **To Do**), a project creation form opens. The following fields are included:

- **Project Title:** The name of the project.
- **Project Description:** A detailed description of the project's goals and objectives, with formatting options.
- **Account:** Associate the project with an existing client in the CRM module.
- **Department:** Choose one or more departments responsible for implementing the project.

- **Assigned To:** Select users who will work on this project.
- **Priority:** Set the importance level.
- **Status:** Initially set as To Do, In Progress, or another relevant status.
- **Tags:** Add predefined or custom tags for easier identification of the project.
- **Due Date:** Establish a deadline.

Once the information is filled in, click **"Create Project,"** and the project will appear in the corresponding column.

Viewing a Project and "View Mode":

After a project is created, clicking on it opens an interface displaying all its details. This interface includes buttons for various actions such as:

- **Edit:** Modify the project's attributes.
- **Delete:** Remove the project.
- **Comments:** Add internal notes or observations.
- **View Mode:**

View Mode Features:

- Displays a focused view of the project's details, including its:
    - Name
    - Description
    - Priority
    - Assigned Members
    - Due Date
    - Tags
    - Status
- This mode provides a clean and concise overview of the project without showing associated tasks.

To view tasks related to the project:

- Exit **View Mode** and return to the standard project page view.
- In the standard view, beneath the project details, you will find the task board specific to that project, organized into **To Do, In Progress, Completed** columns.

View Completed History:

- An additional option that allows you to see tasks that have already been completed within the project, providing a historical perspective on the team's progress.

This system ensures that projects are efficiently managed and tracked while providing a clear and comprehensive view of their progress and associated tasks.

Tasks

Context and Logic:

Tasks are the most granular components of project management. Each task represents an action or a set of specific actions necessary for the project's progress. Tasks are always associated with a project, and that project is linked to a client (account). Thus, the flow of information is clear: Account -> Project -> Task.

Main Task Interface:

Tasks within a project are presented in a **Kanban-style board**, similar to projects, and are organized into columns:

- **To Do:** Tasks waiting to be started.
- **In Progress:** Tasks currently being actively worked on.
- **Completed:** Tasks that have been completed.

These tasks are visible on the main page of the project. However, it is important to note that **View Mode** does not display tasks but only project details. To interact with tasks, you must be in the **standard project view mode**, where these tasks are displayed.

Creating and Editing a Task:

Each column (**To Do, In Progress, Completed**) has a **"+"** button to add a new task. The task creation form includes:

- **Task Title:** The name of the task.
- **Task Description:** A detailed description of the activity to be completed.
- **Client (Account):** The client for whom the task is being performed (inherited from the project).
- **Project:** The project the task is part of.
- **Department:** The department responsible for executing the task.
- **Assigned To:** The user(s) responsible for completing the task.
- **Priority:** The importance or urgency of the task.
- **Status:** Initially set as **To Do**, but it can also be directly set as **In Progress** or **Completed** if the task is already finished.
- **Tags:** Labels for identification (e.g., PPC, SMM, Development).

- **Due Date:** The deadline for completing the task.
- **Activity Type:** The type of activity (**Task, Meeting, Other**) for additional clarity.

After pressing the **"Create Task"** button, the task is displayed in the appropriate column.

Managing and Monitoring Tasks:

Tasks can be moved between columns (**To Do** to **In Progress**, and then to **Completed**) via drag-and-drop or by updating their status. Information such as due dates, priority, and assignees can be updated at any time. Additionally, filtering and searching functionalities, similar to those in the projects module, allow users to highlight only the relevant tasks.

History and Time Tracking:

For an overview, it is possible to view the history of completed tasks. Separately, there is a **time tracking feature** (detailed in the "Functionalities" section) that allows recording the actual time worked on a task. This ensures complete management: from setting an objective, monitoring progress, to evaluating resources used.

By offering these functionalities and levels of detail, Fuse Digital provides an integrated approach to internal processes, starting from a simple client (**account**) to well-defined projects and easily manageable tasks. **View Mode** offers a simplified view of project details without tasks, while the standard mode displays both project details and tasks. This allows each team to tailor their view according to their needs: either focusing on the core information of a project or interacting with the full list of tasks and their statuses.

Clients

The **Clients** module in Fuse Digital provides a centralized view of all active and inactive clients with whom the organization has a collaborative relationship. The information displayed in this module is directly sourced from the data recorded in **Accounts**, ensuring automatic synchronization: when an account is created and configured with client details, this information also appears in the **Clients** section. The module allows filtering, sorting, viewing, and detailed analysis of each client, giving the team a comprehensive perspective on relationships, contractual value, and task progress.

Accessing and Organizing Clients:

On the main page of the **Clients** module, clients are displayed as individual cards, each containing relevant information. A search field at the top of the page facilitates the quick identification of a client by name or other keywords.

Information displayed on each client card:

- **Client Name:** Represents the entity created after an account is established.
- **Account Manager:** The team member responsible for the client relationship, noted in the account file.

- **Email and Phone Number:** Contact details automatically retrieved from the account.
- **Due Date:** The contractual period (e.g., 01-11-2024 – 30-06-2025).
- **Contract Value:** The contract value, useful for understanding the importance and scope of the client relationship.
- **Task Indicators:** Each card displays statistics such as the number of high-priority tasks, active tasks, and completed tasks. This data is sourced from the **Project and Task Management** module, providing a direct link between CRM data and the workload dedicated to the client.

Filtering, Sorting, and Viewing Clients:

On the right side of the interface, the **Filter & Sort** option opens a menu with various criteria for displaying clients:

- **Sort By:**
    - **Alphabetically:** Displays clients in alphabetical order.
    - Additional criteria can be implemented (e.g., by date, priority, etc.).
- **Account Manager:**
    - Displays clients managed by a specific account manager, facilitating the allocation and monitoring of team responsibilities.
- **Duration:**
    - Allows filtering clients by contract duration, enabling the display of only contracts expiring within a specific period or with a particular contractual duration.

Additionally, there is a dedicated button to show or hide **Inactive Clients**, allowing the team to focus on active clients while maintaining access to the history of inactive relationships.

Client Details: View Mode and Individual Client Page

Clicking on a client from the main list opens a dedicated page for that client. This page offers a more detailed view of the client relationship, divided into thematic sections. The data is sourced from the account and supplemented with additional information entered by the team.

Sections available on a client's page:

1. **Footprint Overview:**
    - **General Results:** Information about overall results and collaboration indicators (e.g., achieved objectives, financial or qualitative outcomes).
    - **Activities:** A summary of activities carried out for the client, providing insight into the team’s involvement.

2. **Collaboration Details:**
    - **Dedicated Team Members:** A list of team members directly involved in the client's projects or tasks.
    - **Duration:** The specific contractual period for this client, also mentioned on the card in the main page.
    - **Price (Contract Value):** The value of the agreement, highlighting the client's importance to the business.
3. **Services and Expectations:**
    - **Services:** A list of services provided to the client (e.g., SEO, PPC, Development, SMM).
    - **Client Expectations:** Internal notes about the client's expectations to ensure proper service delivery and a quality relationship.

View Mode: Within the client's dedicated page, there is a simplified view mode called **View Mode**. This streamlined view omits certain interactive or editable elements, focusing on a clear and organized display of data. This allows the team to switch quickly between a detailed/editing mode and a simplified view, suitable for presentations or quick reviews.

Integration with Other Modules:

The **Clients** module does not function in isolation but is directly linked to the **CRM (Accounts)**, **Projects**, and **Tasks** modules. The principle is as follows:

- **Accounts:** Creating or updating an account (client) in the CRM module automatically generates data reflected in **Clients**.
- **Projects and Tasks:** Task statistics (active, completed, high-priority) displayed in **Clients** come from the actual work done on the client's projects and tasks, providing a complete picture of workload and team progress.

Additionally, contractual values, contact details, and contractual periods initially set in **Accounts** are immediately visible in **Clients**, ensuring consistency and saving time. All updates, whether related to account data or tasks and projects, are reflected in this module, providing an up-to-date view of the client relationship.

The Clients module serves as a centralized space for all essential information about active and inactive clients. It bridges the initial account data with the team's current efforts (tasks and projects), integrating them into a coherent and navigable interface. Filtering, sorting, simplified viewing (View Mode), and performance indicators enable the team to make informed decisions, monitor client relationships, and optimize long-term collaboration.

Finance: Revenue, Expenses and Dashboard

The **Finance** module in the application provides a comprehensive overview of the company's financial health by consolidating information about current **Revenue** and **Expenses**, along with forecasts for upcoming periods. This module enables users to analyze the current situation, estimate future trends, and adjust data in real-time, which in turn influences the generated predictions.

Revenue

The **Revenue** section displays income received from clients (**Accounts**) based on **Won** deals from the CRM. Each deal has a value (**deal value**) and a frequency (monthly, quarterly, yearly, or one-time). Key features include:

- **Total Revenue:** A main indicator shows the total sum of revenue for the selected period (e.g., the current month or a future period).
- **Graphs and Charts:** A **pie chart** provides an intuitive visualization of each client's or service type's share of total revenue.
- **Individual Transactions:** Below the charts, a detailed list of transactions is displayed, including name, value, date, and status (**Completed, Active, Canceled**). The status can be updated at any time to reflect the current situation.

If a future period is selected, the **Finance** module also displays anticipated revenue (**predicted**), based on deals with recurring frequency. This allows for early visibility into expected income and strategic resource planning.

Expenses

The **Expenses** section works similarly to the Revenue section but focuses on company costs:

- **Total Expenses:** Displays the total sum of expenses for the selected period.
- **Graphical View:** A **pie chart** illustrates the distribution of expenses by category (e.g., Salaries, Rent, Subscriptions), helping to quickly identify major costs.
- **Expense List:** Transactions are displayed with value, date, and status (**Active, Completed, Canceled**) and can be edited at any time.

As with revenue, selecting a future period shows not only recorded expenses but also **predicted** ones. This helps you anticipate upcoming expenses, understand their impact on the budget, and make decisions to optimize costs.

Financial Dashboard

The **Dashboard** consolidates data from Revenue and Expenses to provide a unified overview:

- **Total Profit:** The difference between revenue and expenses is displayed in real-time, reflecting the profitability of the selected period.
- **Statistics and Charts:** Visual representations (charts, comparative graphs) show the evolution of revenue and expenses over time, including both real data and forecasts for upcoming months, quarters, or years.
- **Impact of Edits on Forecasts:** Any changes to real data (e.g., updating transaction values, changing the status of payments or receipts) are factored into the system. Future forecasts are automatically recalibrated, providing updated estimates based on the latest information.

Flexibility and Control

Un aspect important al modulului Finance este flexibilitatea în actualizarea datelor:

A key aspect of the Finance module is its flexibility in data management:

- Real-Time Editing: Any transaction (whether revenue or expense) can be modified at any time. You can adjust values, dates, and statuses to keep records as accurate as possible.
- Automatic Forecast Updates: Each time real data is updated, the forecasts for future periods are influenced and recalculated. This ensures increasingly accurate future projections as new information is entered, for both revenue and expenses.

Summary

The Finance module (Revenue, Expenses, Dashboard) provides:

- A complete view of the current financial situation, with grouped and visually represented revenues and expenses.
- Forecasts for future periods, based on existing CRM data and dynamically updated whenever real values are edited.
- The ability to make changes at any time, ensuring business decisions are based on the most accurate and current financial picture.

With these features, the Finance module becomes an essential tool for planning and optimizing resources, enabling the team to react quickly to changes and keep the company on a stable and profitable financial trajectory.

HR

My Employees

The **My Employees** module in the HR section offers two modes of viewing employee information, with distinct functionalities depending on the type of user:

1. **Admin Mode:** For administrators or HR users with special rights.
2. **User Mode:** For regular (non-admin) users, who can view only their own information.

Admin Mode – Global View of Employees

When a user with an administrator role (or HR with extended rights) accesses **My Employees**, they see the complete list of all employees in the company. In addition to viewing basic information (name, job title, department, seniority, etc.), the Admin Mode allows:

- **Advanced Search and Filtering:**
    - Admins can filter employees by name, department, role, or job code to quickly locate a specific individual.
- **Access to All Details:**
    - By selecting an employee, admins can view extended details, such as start date, contract information, and remaining leave days.
- **No Viewing Restrictions:**
    - Admins are not limited to their own profile and can review the records of all organization members.

Important Note: There is an option available in the **Administrator Panel**, which allows admins to modify employee information. While this functionality is not directly available in the **My Employees** module, it is closely tied to it. Through the **Administrator Panel**, the admin can adjust data such as role, department, email address, or leave days for any employee. This ensures the maintenance of up-to-date and accurate records.

User Mode – Personal Profile View

When a regular user (without an admin role) accesses **My Employees**, they see only their personal profile. In this mode:

- **Quick Access to Personal Data:**
    - The user can view their personal details, such as job title, department, remaining leave days, start date, and other relevant information.
- **No Editing Options:**
    - A regular user cannot modify the displayed data in their personal profile. Any changes to their information must be requested from the HR team or administrators, who will perform updates via the **Administrator Panel**.
- **No Search for Other Employees:**
    - User Mode does not display other employees and lacks search or filtering options, as access is strictly limited to the user's own data.

Through these two modes – Admin and User – the **My Employees** module meets the needs of different user categories, providing appropriate access and control over personnel data while ensuring accuracy and information security.

Schedule Annual Leave

The **Schedule Annual Leave** module in the HR section provides advanced functionality for managing leave days. It is structured to serve both regular users (employees) and administrators, with differing interfaces and features based on the type of user.

View for regular users

When a regular user accesses the **Schedule Annual Leave** module, they only have access to their own leave information. The features available include:

1. **Personalized Calendar:**
    - The calendar displays:
        - Working days.
        - Public holidays (e.g., Romania's National Day is highlighted in yellow).
        - Days already reserved for leave, marked with a specific color (e.g., green).
2. **Leave Statistics:**
    - The left-hand panel displays:
        - **Vacation days taken:** The number of vacation days already used.
        - **Remaining leave days:** The remaining vacation days from the total allocated.
        - **Sick leave taken:** The number of sick leave days used.
        - **Special days taken:** Special leave days, such as for family events.
    - These statistics update in real-time based on leave bookings.
3. **Planning Leave:**
    - Users can select the **"Schedule annual leave"** option to open a modal window.
    - In the modal window, the user must:
        - Select the type of leave (**Vacation, Sick Day, Special Day**).
        - Enter the desired period (start and end dates of the leave).
        - Save the leave request by clicking **"Add and Save Holiday"**.
    - Once saved, the selected days are marked in the calendar.
4. **Restrictions and Privacy:**

- Users can only view their own data and statistics. They do not have access to information about other colleagues.

View for Administrators

Administrators have access to an extended interface with additional functionalities. In this mode:

1. **Global Calendar:**
    - The calendar displays:
        - All public holidays.
        - Scheduled leave days for all employees.
    - Each booking is visible and organized by user, identifiable by name or department.
2. **Consolidated Statistics:**
    - Administrators can view a global summary of leave days used by each employee.
    - This includes:
        - The total number of vacation days taken.
        - Sick leave days.
        - Special leave days.
3. **Managing Leave Requests:**
    - Administrators can approve, modify, or reject leave requests submitted by employees.
    - Changes made by the administrator are reflected in real-time in the users' calendars.

By offering distinct interfaces and functionalities for regular users and administrators, the **Schedule Annual Leave** module ensures efficient leave management, real-time updates, and accurate records for both individual and organizational needs.

Benefits

The **Benefits** module in the HR section is designed to provide employees with a clear overview of the benefits they can access within the organization. These benefits are defined and managed by company administrators through the **Admin Panel**, while regular users can only view the available information.

View for normal users

Regular users accessing the **Benefits** module will see a simple and clear interface where all available benefits are listed. These benefits are displayed as individual cards, each containing relevant details.

Available Benefits:

1. **Discounts on Fitness Memberships:**

    - Employees can receive a 10% cashback on fitness memberships, based on proof of payment.
    - The cashback is added directly to their salary.

2. **15% Partner Discount for Employees:**
    - Employees benefit from a 15% discount on services offered by the company's partners.
    - The discount is available upon presenting proof of employment at the time of booking or purchase.
3. **Access to Medical Packages:**
    - Employees have access to personalized medical packages offered by the company's partners.
    - These packages include consultations, tests, and other medical investigations.
4. **Support for Professional Development:**
    - The company supports learning processes by providing access to specialization courses.
    - Costs are reimbursed within the available budget.

Benefits Management

The details and structure of these benefits are managed by company administrators via the **Admin Panel**, a dedicated module for configuring and updating benefits. Administrator functionalities include:

- Adding new benefits.
- Modifying existing benefit conditions.
- Removing benefits that are no longer relevant.

Advantages for the benefits module

1. Accessibility: All benefits are displayed in one place, eliminating the need to request additional information.
2. Transparency: Employees can clearly view the types of benefits available and how they can be accessed.
3. Flexibility: Administrators can update the list of benefits based on the company's needs or new partnerships.

Integration with Admin Panel

The **Benefits** module is directly connected to the **Admin Panel**, allowing instant updates to the information. Any changes made by administrators are immediately reflected in the user interface.

Appraisal

The **Appraisal** module in the HR section is an advanced system for employee performance evaluation, based on criteria set by administrators. It is designed to facilitate two-way communication between employees and administrators, contributing to a transparent and efficient evaluation process. This module features two primary views: **User View** and **Administrator View**.

User View

In this mode, users have access only to their own data and performance reports, with the ability to interact with assigned evaluations.

Funcționalități:

Features:

1. Task Performance:
    - Users can view the percentage of tasks completed for the current period.
    - Information is visually presented, summarizing assigned projects, tasks in progress, and completed tasks.
2. Personal Goals:
    - Users can see the goals set by the administrator for the current period.
    - If no goals are set, an appropriate message is displayed (e.g., "No personal goals set").
3. Response to Appraisal:
    - Users can respond to evaluation messages received from the administrator by completing a dedicated section.
    - Responses may include details about their progress, challenges faced, or other relevant information.
4. Task Details:
    - Users can access details about active projects, assigned tasks, and their status, including completion updates.

Administrator View

Administrators have full access to the module, with the ability to manage evaluations for all employees in the organization. Evaluations are based on specific criteria, such as department, seniority, and evaluation period.

Features:

1. Setting Evaluations:

- Administrators can define evaluation periods and associated criteria (e.g., goals for each department and seniority level).
- These are visible to users only after configuration.

2. Monitoring Progress:
    - Administrators can track each employee's progress regarding completed tasks and achieved goals.
3. Feedback Response:
    - Administrators can respond to employee feedback directly within the module, ensuring a continuous and structured communication flow.
4. Reporting and Analysis:
    - Based on collected data, administrators can generate detailed reports on employee performance, identifying strengths and areas for improvement.

Evaluation Process

1. Initiating the Evaluation:
    - Administrators set evaluation criteria, including:
        - General and individual goals.
        - Specific tasks based on department and seniority.
    - Employees receive notifications about assigned evaluations.
2. Employee-Administrator Interaction:
    - Employees submit responses based on the evaluations received.
    - Administrators provide additional feedback or clarifications as needed, depending on the employee's response.
3. Finalizing the Evaluation:
    - Once both parties have interacted, the evaluation is finalized and archived for future reference.

Advantages of the Appraisal Modules

1. **Transparency in Evaluation:**
    - The process is documented and accessible to both users and administrators, reducing ambiguities.
2. **Real-Time Feedback:**

    - Two-way communication ensures active participation from both parties.
3. **Monitoring and Reporting:**
    - Collected data enables detailed analysis of individual and team performance.
4. **Customization:**
    - Evaluations can be tailored to the needs of each department and employee.

The **Appraisal** module supports a structured, interactive, and fair evaluation process, ensuring alignment between organizational goals and employee development.

Inventory Management

The **Inventory Management** module is an advanced stock management system that allows for the creation, organization, and monitoring of products and their categories. This module is divided into multiple sections and functionalities, each with specific purposes.

Product Categories

- Functionality: Enables users to create and manage product categories.
- Usage:
    - Users can add a new category by entering a descriptive name.
    - Categories are used to logically and accessibly organize products.
    - A category can be searched using the search bar at the top of the interface.

Products

- Functionality: Allows the addition and management of individual products.
- Usage:
    - Products are displayed in a table with details such as:
        - Product Name
        - Description
        - Product Status (e.g., Good Stock, Low Stock)
        - SKU (unique product identification code)
    - Users can search for products using the search bar.
    - Each product is associated with an image, which can be uploaded when adding a new product.

- Products can be created using the New Product option, where the following details are filled in:
    - Name: Product name.
    - Category: Selection of an existing category.
    - Description: Specifications and additional details.
    - Product Image: Upload an image of the product.
    - Status: Current stock status (e.g., Good Stock, Low Stock).
    - Available Stock: Current number of units in stock.
    - Unit Price: Individual product cost.
    - Expiration Date: Optional.

Product Dashboard

- Functionality: Displays current stock levels and monitors products with low stock.
- Usage:
    - Products are shown with their current stock status.
    - Products below the set stock threshold are automatically marked as Low Stock.
    - Administrators can access additional details about each product directly from the dashboard.

Restock Dashboard

- Functionality: Manages restocking orders.
- Usage:
    - Administrators can initiate a new restock order using the New Restock Request option.
    - Details completed for a restock request include:
        - Product: Select the product to be restocked.
        - Priority: Level of urgency (High, Medium, Low).
        - Required Quantity: Amount needed to replenish stock.
        - Supplier: Supplier information.
        - Order Date: Date of the order.
        - Estimated Delivery Date: Expected delivery date.

        - Comments: Optional additional notes.
        - Status: Restock request status (e.g., Waiting, In Progress, Completed).
    - Each restock request is saved and can be reviewed for updates.

Automated Processes

1. Low Stock Alert:
    - The system automatically detects products that have reached the minimum stock threshold and marks them with a Low Stock tag.
2. Categories and Filtering:
    - Products can be filtered by category or status.
    - Users can quickly navigate between categories for more efficient management.

This module is essential for companies managing real-time inventory, offering complete control over stock levels and restocking processes. It ensures that inventory management is efficient, organized, and transparent.

Appointments

The **Appointments** module facilitates the management of appointments and scheduling activities in an organized manner. It is structured into two main components: **Services** (configuring available offerings) and **Calendar** (actual scheduling of activities). Below is a detailed description of the functionalities and processes within this module.

Services

This section forms the foundation for appointments, representing the activities that can be offered or booked, along with all necessary details for scheduling.

What happens here?

- **Creating a New Service:**
    - Administrators define services available for booking. Example: "Financial Consultation," "SEO Audit," "Promotional Video Shoots."
    - The form allows input of details such as:
        - **Service Name:** The title that will appear in the list.
        - **Service Duration:** The allocated time for the service.
        - **Service Cost:** The price charged for the service (if applicable).
        - **Location:** Where the activity will take place (e.g., online, office, another location).

        - **Provider:** The person or team delivering the service.
    - An attached image provides quick visual identification.
- **Editing or Managing Existing Services:**
    - If a service needs updates (e.g., duration or details), it can be edited anytime.
    - Services no longer needed can be permanently deleted.
    - The "Duplicate" functionality allows copying a service to quickly create a similar one.

Calendar

This submodule is the primary workspace for users, organizing appointments using the services configured in the **Services** section.

What happens here?

Adding an Appointment:

1. **Selecting a Service:**
    - The user (administrator or authorized employee) chooses an available service from the predefined list.
2. **Configuring Appointment Details:**
    - Additional information is added, such as:
        - **Client:** The person or company for whom the appointment is scheduled.
        - **Time Slot:** The exact day and time of the appointment.
        - **Recurrence:** The option to mark the meeting as recurring (e.g., weekly, monthly).
        - **Participants:** Team members who will attend the activity.
        - **Notes:** Additional details for meeting context.
3. **Creating the Appointment:**
    - The appointment immediately appears in the visual calendar and can be accessed anytime for modifications or review.

Managing Existing Appointments:

- **Viewing Details:**
    - Users can click on an appointment to see full details: client, service, participants, and other specifics.
- **Modifying an Appointment:**

    - Appointments can be moved, updated (e.g., changing time, date, or participants), or completely canceled.
- **Canceling/Rescheduling:**
    - If an appointment is no longer valid, it can be deleted or rescheduled to a later date.

Setting Work Schedules

- Based on the company's hours, a fixed working interval (e.g., 9:00 AM–6:00 PM) can be set to prevent bookings outside these times.
- The option **"See working days only?"** automatically hides non-working days (e.g., weekends or configured holidays).

Advanced Features

- **Color-coded Appointments:** Appointments can be visually distinguished with different colors.
- **Notifications:** Users receive reminders for upcoming appointments.
- **Integration with Other Modules (Optional):** Services in the **Appointments** module can integrate with other modules (e.g., inventory, sales).

General Workflow

1. Administrators Configure Available Services:
    - Example: "SEO Audit" with a 2-hour duration and a cost of $500.
2. Appointments Are Created for Clients:
    - An employee selects "SEO Audit," chooses the client, sets the day and time, and adds participants.
3. Appointments Appear on the Calendar:
    - All authorized users can see the appointments, and changes are saved in real-time.
4. Managing Activities Over Time:
    - Appointments can be moved, canceled, or rescheduled based on client and team needs.

Beneficii

- **Centralized Organization:** All appointments are visible in a clearly structured calendar.
- **Flexibility:** Services and appointments can be managed in real-time.

- **Efficient Collaboration:** Multiple participants can be added to the same appointment, improving communication efficiency.
- **Error Reduction:** Notifications and working hours settings reduce the risk of overlaps or scheduling errors.

Thus, the **Appointments** module is ideal for efficiently managing daily activities and facilitating collaborative planning between employees and clients.

Reports

The **Reports** module is a core component of the platform, providing advanced systems for analyzing and monitoring activities and recorded time. It is divided into two main sections: **Dashboard Reports** and **Operational Reports**, each offering functionalities and views that allow users to understand individual, team, and project performance in detail. Below is a comprehensive and detailed description of each submodule, along with use cases.

Dashboard Reports

This section provides an overview of activities and team performance within a specified time period. It is divided into two distinct views:

View 1: General Statistics

This view focuses on visual and numerical summaries that help users quickly understand project and team performance.

1. **Key Elements Displayed:**
    - **Total Time:** Represents the total recorded time for the selected period, calculated from all time entries in the database.
    - **Top Project:** Highlights the project with the highest time allocation, indicating major priorities or tasks.
    - **Top Client:** Displays the client for whom the most time was dedicated.
    - **Pie Chart:** A circular chart breaks down the time recorded per project, offering a visual representation of workload distribution.
    - **Project List:** Shows active projects along with the accumulated time for each, expressed both in hours and as a percentage of the total time.
2. **Advanced Functionalities:**
    - Each list item is clickable, leading to specific details about the project or client.
    - The pie chart is interactive; selecting a section reveals data for a particular project or client.
3. **Filtering Options:**

- **Project:** Filter by one or more projects.
- **Team Members:** View the contributions of a specific user.
- **Time Period:** Select a specific range (e.g., last month, last quarter).

4. **Access to Additional Details:**
    - A navigation button (arrow at the top right) allows users to switch to **View 2**, which provides more in-depth information.

View 2: Advanced Details

This view expands on the data displayed in View 1, adding another layer of information and interactivity.

1. **Key Elements Displayed:**
    - **Recent Tasks Started:** Shows tasks currently active, including the user who started them.
    - **Visual Indicators for Active Activities:**
        - Active tasks are marked with a red dot, offering clear visibility of ongoing work.
    - **Total Activity Time:** The total active time calculated for the selected period.
    - **Recently Completed Tasks:** Details on the most recently finished tasks.
2. **Quick Access to Details:**
    - Users can view detailed information about each task, such as:
        - The associated project.
        - The client.
        - Total time allocated.
        - Individual time entries.
3. **Use Cases:**
    - **Project Managers:** Quickly identify ongoing tasks to evaluate team progress.
    - **Time Discrepancies:** Track missing or incorrect time entries to ensure data accuracy.

Operational Reports

The **Operational Reports** submodule is designed for detailed and customizable data analysis. It includes two views: **Summary** and **Detailed**, each offering unique functionalities.

View 1: Summary

This view provides a visual summary of the data, making it easy to quickly understand overall trends.

1. **Dynamic Bar Chart:**
    - **X-axis:** Represents the selected time interval (days, weeks, or months).
    - **Y-axis:** Represents the total time accumulated (in hours) for tasks or projects.
2. **Advanced Filters:**
    - **Team:** Select a user or the entire team.
    - **Client:** View data for a specific client.
    - **Project:** Analyze a specific project.
    - **Task:** Focus on individual activities.
    - **Tags:** Select categories (e.g., SEO, Development, PPC).
    - **Status:** View completed, active, or pending tasks.
3. **Data Interpretation:**
    - The chart displays color-coded bars corresponding to each project or task.
    - The data can be used to analyze the overall performance of the team or project.

View 2: Detailed

This view focuses on granular information, offering a complete list of all tasks and details about the time associated with each.

1. **List Elements Displayed:**
    - **Task Name.**
    - **Associated Project and Client.**
    - **Team Members:** Who worked on the task.
    - **Recorded Time:** Total duration allocated to each activity.
    - **Individual Time Entries:** The date and time of each recorded entry.
2. **Advanced Functionalities:**
    - Time entries can be manually edited, allowing for corrections or adjustments.
    - The same filters as in **Summary** can be applied, and results can be sorted by criteria such as total time, task name, or user name.
3. **Use Cases:**
    - **Granular Analysis:** Identify time-consuming tasks.

- **Validation and Corrections:** Managers can verify and validate recorded time to ensure data accuracy.
- **Detailed Reporting:** Export data for external reporting or future use.

Use Case Examples

1. **Project Managers:**
   - **Identify projects with the highest time allocations and analyze if these allocations are efficient.**
   - **Track individual team members' contributions to active projects.**
2. **Financial Analysis:**
   - **Calculate costs based on recorded time for each project or client.**
   - **Prepare reports for billing purposes.**
3. **Operational Optimization:**
   - **Identify activities that excessively consume time and resources.**
   - **Implement corrective measures based on detailed reports.**

The **Reports** module offers a comprehensive range of functionalities for analyzing and managing recorded time. By leveraging advanced filters, dynamic visualizations, and detailed data views, users can efficiently monitor team activities, optimize processes, and make informed decisions based on data.

Admin Panel

The **Admin Panel** is divided into two main sections, as visible in the interface:

Users & Authentication

This section is dedicated to user management and controlling permissions. It comprises the following submodules:

a) User Management

- **User Overview:** Admins can view a complete list of registered users. Each user is displayed with:
  - Full Name.
  - Current Role (e.g., Admin, User).
  - Account Status (e.g., Active, Inactive).
- **User Search:** A search bar allows quick user searches by name.

- **User Sorting:**
    - Alphabetically.
    - By account creation date.
- **Actions Available for Each User:**
    - **Edit:** Through the "Edit" button, admins can modify:
        - User's name.
        - User's email.
        - Department (e.g., DEV, SALES, SMM).
        - User's role (e.g., Admin, User).
        - User's password (can be reset).
    - **Delete:** Users can be soft-deleted, meaning their data is deactivated but retained in the database for reference.

b) Role Management (Department Permissions)

- **View Departments:** Displays all departments defined in the system (e.g., SMM, DEV, PPC).
- **Manage Permissions:** Admins can assign custom permissions for each department, including:
    - Accessible modules (e.g., HR, CRM, Finance).
    - Detailed permissions such as view-only or full access (read/write).
- **Quick Navigation:** Departments are listed, and clicking on one opens a detailed screen showing all associated modules and specific permissions.

Employees' Settings

HR Details

Employees' Settings

HR Details

- **General Description:**
    - The HR Details section displays all employees/users in the company within a simple, intuitive interface.
    - Admins can select a user to view and edit HR information.

Key Features:

1. **Employee Listing:**

- All users are displayed as cards, each showing the employee's name and profile picture.

2. **Search Functionality:**
    - A search bar allows quick filtering by employee name.
3. **Editing Employee Details:**
    - Upon selecting an employee, admins can edit:
        - Start Date.
        - Job Title.
        - Seniority Level (e.g., Junior, Middle, Senior).
        - Email Address.
        - Physical Address.
        - Birthday.
        - Vacation Days.
        - Contract (a PDF document can be uploaded and saved for future reference).
4. **Saving Changes:**
    - The **Save changes** button allows updates to be saved in the database.

Benefits

- **General Description:**
    - The Benefits section allows admins to create and manage employee benefits. These benefits become visible to users in the HR module.

Key Features:

1. **Displaying Existing Benefits:**
    - A list of available benefits is shown as cards. Each card contains:
        - Benefit Title (e.g., "Dental Discount - Dr. Kurbe").
        - Benefit Description.
        - Attached Document (e.g., Discount DOC) for download.
2. **Adding a New Benefit:**
    - Clicking **+ Add new benefit** opens a form for creating a new benefit, including:
        - Title.
        - Short Description.

        - Uploading a mandatory PDF document.

3. **Editing and Deleting Benefits:**
    - Existing benefits can be edited or deleted using the contextual menu (accessible via three dots).
4. **User Visibility:**
    - All saved benefits will be visible to employees in the HR module for download and reference.

Appraisals

- **General Description:**
    - The Appraisals module allows admins to configure employee evaluations based on department and seniority, divided into time intervals (current year or next year).

Key Features:

1. **Selecting Time Interval:**
    - Admins can choose between:
        - **This Year.**
        - **Next Year.**
2. **Selecting Seniority:**
    - Available options:
        - Junior.
        - Middle.
        - Senior.
3. **Defining Expectations:**
    - After selecting the department and seniority level, admins can input expectations for employees in two distinct periods:
        - **First Half.**
        - **Second Half.**
4. **HR Module Visibility:**
    - Saved evaluations become visible to users in the HR module, where they can respond.

Appraisal Configuration

1. The admin accesses the **Appraisals** section and selects the year **Next Year**.
2. They choose the **SEO** department and **Junior** seniority.
3. Expectations are entered for the first and second halves of the year.
4. Configuration is saved, and users can view these expectations in the HR module and respond to them.

Integration with Other Modules

- **Employee HR Details:** The data edited in HR Details is reflected in the My Employees module of HR.
- **Benefits Management:** Any modifications made in Benefits are instantly visible in the HR module.
- **Appraisals:** Configured appraisals appear in the HR module, enabling users to interact with evaluations directly.

By combining centralized management, detailed controls, and seamless integration, the Admin Panel ensures efficient administration of user data, permissions, and HR-related tasks.

Functionalities

Time Tracking

The **Time Tracking** functionality enables users to monitor the time spent on each task. It provides flexible options for recording time, either through automated tracking using a timer or by manually adding time. Time entries are saved and can be reviewed in the task history, forming the basis for generating reports in the **Reports** module.

Componenents and Features

1. Starting and Stopping the Timer
    - Each task has an option to activate a timer for automatic time tracking.
    - The timer can be stopped by the user at any time, with the recorded time automatically saved to the history.
    - Visual Interface:
        - A start/pause button (▶/⏹) for managing the timer.
        - A clear indicator displaying recorded time in the format HH:MM:SS.

2. Manually Adding Time
    - Users can manually input time spent on a task using the "Set time manually" option.
    - Steps:
        - Select the date and input the time in the HH:MM:SS format.
        - Confirm by pressing the "SET" button.
    - Manually added entries are stored in the task's history.
3. Editing Time Entries
    - Previously recorded times (automatic or manual) can be modified:
        - Each entry has an edit button for adjusting the recorded time.
        - Changes are automatically saved and reflected in the total accumulated time for the task.
    - Deleting Entries:
        - Incorrect entries can be removed using the "Delete" button.
4. Viewing Total Time
    - The total time accumulated, including previous entries, is displayed to the right of each task.
    - Users can access the full history of entries by clicking a dedicated icon (≡).

Examples of Visual and Interactives Features

1. **Active Timer:**
    - The timer can be activated by toggling the switch to the ON position.
    - Users can view the current tracked time on-screen.
2. **Manual Entry:**
    - The "Set time manually" option opens a pop-up where users can input the desired time.
3. **History and Editing:**
    - The history section shows each time entry with:
        - The date and time of the entry.
        - The name of the user who made the entry.
        - Options for editing or deleting.

Notifications

The **Notifications** module is a centralized system within the platform that allows users to view all important events related to their activities or the general system, depending on their access level. This module is essential for informing users about changes, activities, and relevant interactions within the platform.

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1. Notification Access

- **Normal Users:**
    - View only notifications related to activities in which they are directly involved.
    - Examples: Changes in tasks they are assigned to, comments, personal updates, manual time additions to tasks.
- **Administrators:**
    - View all general system notifications, including advanced notifications (changelog, CRM, Finance, etc.).
    - Examples: Global changes, activities performed by other users, time tracking activities.

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2. Notification Types

1. **Personal Information Notifications:**
    - Related to changes in personal data or activities exclusive to the user (e.g., password change, HR data update).
2. **Task Comment Notifications:**
    - Generated when a comment is added to a task assigned to the user.
3. **Activity Change Notifications:**
    - **Notify users about changes to a task or project they are involved in.**
    - **Examples:**
        - Task status change (e.g., "To Do" → "Completed").
        - Task reassignment.
4. **Changelog Notifications (Admins Only):**
    - Logs all changes made by users in the application.
    - Examples:

        - "User X changed status Y on task Z."
        - "User X updated a benefit."

5. **Time Tracking Notifications:**
    - Specific to the time tracking system.
    - Examples:
        - Timer started for a task.
        - Timer stopped or time manually added.
6. **CRM Notifications (Admins Only):**
    - Generated by events in the CRM module.
    - Examples:
        - Addition or deletion of a client.
        - Changes in the status of a lead.
7. **Finance Notifications (Admins Only):**
    - Related to the company's financial activities.
    - Examples:
        - Invoices issued or deleted.
        - Changes in financial reports.

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3. Key Features

a. Listing Notifications:

- Notifications are displayed chronologically and divided into two categories:
    - **Today:** Notifications generated on the current day.
    - **Older Notifications:** Notifications from previous days.

b. Filtering Notifications:

- Users can customize the notification view using filters:
    - By user (available for administrators only).
    - By notification type:
        - Personal Information.
        - Task Comments.

        - Time Tracking.
        - CRM.
        - Finance.

c. Search System:

- Allows users to search for specific notifications using a keyword (e.g., "timer," "completed task").

d. Detailed View:

- Notifications include:
    - The name of the person who performed the action.
    - Description of the action (e.g., "Gabriela Arbanas changed the status of task X").
    - Time (e.g., "X days/hours ago").

e. Mark Notifications:

- Users can mark notifications as read or unread to better manage the information volume.

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4. Usage Scenarios

Scenario 1: Normal User Viewing Notifications

1. The user accesses the Notifications module.
2. They view active notifications (comments, status changes, manual time additions).
3. They use the search function to find a specific notification related to a particular task.
4. They mark the notification as read.

Scenario 2: Administrator Viewing Notifications

1. The admin opens the Notifications section.
2. Applies a filter to view notifications from the CRM module.
3. Analyzes a changelog detailing modifications made by another admin.
4. Uses the "Filter by user" function to review activities performed by a specific employee.

Scenario 3: Managing Time Tracking Notifications

1. An admin observes notifications related to employees starting and stopping timers.
2. Verifies if hours were manually added to a task and identifies who made the modification.