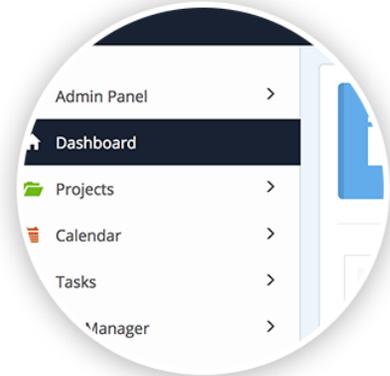




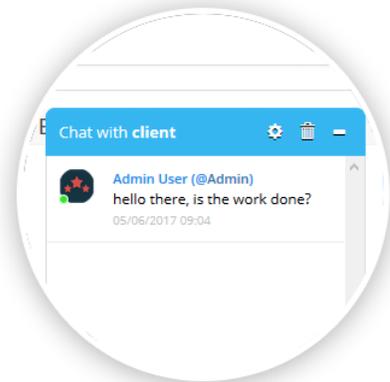
TDesign

Full Feature List - Client Relation Management Script (CRM)



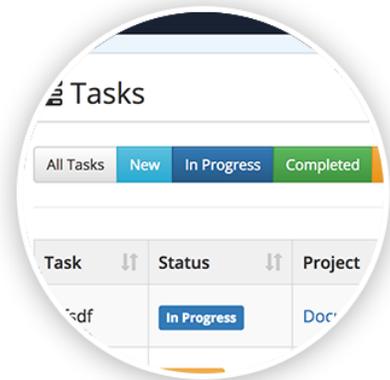
Unlimited Projects

Create unlimited projects that allow you to manage teams of users, collections of files and important tasks that need completing.



Live Chat

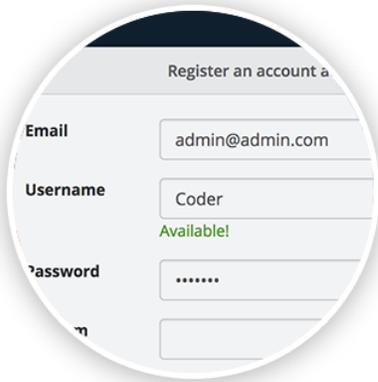
Live Chat allows you to communicate with any user on the system. Create group chats with your team, one on one conversations and even see a list of online users.



Tasks & Objectives

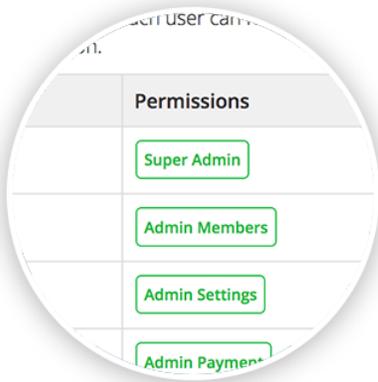
Planning and mapping your progression of projects has never been easier with Task Management system.

Assign teams to individual tasks and have them alert you upon completion.



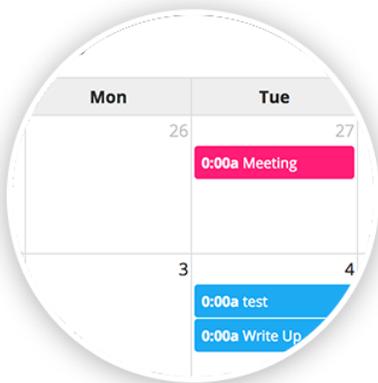
Social Media Login

Option to register accounts directly to the system using your social media accounts. You can enable/disable this feature in the Admin Panel.



User Roles

A powerful User Role system allows you to give access to specific members to various areas of the site.



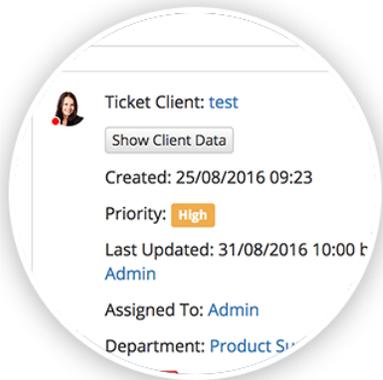
Project Calendar

Never forget an important meeting again with the Project Calendar. Team members only see events for Projects they are a member of. Also works with Google Calendar.



Invoices

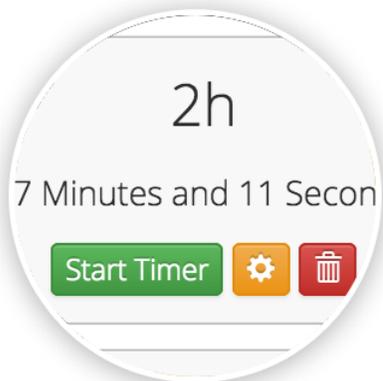
The invoice system allows you to setup reoccurring invoices, templates and one-off payments that you can bill your clients with.



Tickets

Make it easy on your clients by providing them with a powerful ticket system that allows you to offer them fantastic support.

iMAP support available.



Timers

Keep track of how much time you spend on your projects by using our timers.

Includes reports that shows where your time is being spent.

- **User & Registration System**

- Users can register for an account using the quick and easy register page.
- Captcha enabled registration page to prevent bots from spamming your site (can be disabled in Admin Panel)
- Users can also register accounts using their Social Network accounts, making it even quicker to sign up to your site!
- Login System comes with a Forgotten Password page, to allow users to reset their password via email.
- Prevents spam by making sure the email address is unique and valid.
- Passwords are encrypted using PHPass library (bcrypt) to make sure your data is safe!
- Can disable registration from Admin Panel, as well as Social Login option.
- Brute Force Login Protection
- Account Activation Option

- **Project System**

- Create unlimited amounts of Projects, each with their own unique teams.
- Organize by custom created categories.
- Archive completed projects so old data is out of the way.
- Make active project to show relevant data easily.
- Mark Project Completion based on Tasks completed.
- Restrict which users can create projects through User Roles.
- Each Project can have a team of users who have specific permissions.

- **User Roles**

- User Role system allows you to assign specific permissions to users.
- Set a default User Role in the Admin panel.
- Admins have access to all projects/sections of the site.
- Create custom User Roles in the Admin Panel.
- Create User Roles specifically for Clients so they don't see more than they need to.

- **Admin System**

- Global Settings allow you to change site name, logo, enable registration, file upload types and more.
- Social Media Settings allow you to set if users can login with Facebook, Twitter, Google accounts.
- Section Settings allow you to turn off certain sections of the system.
- Calendar Settings allow you to switch between Google Calendar and Site Calendar.
- Manage all members easily; edit their usernames, passwords, emails, user roles.

- Add new members from Admin Panel.
- User Roles allow you to create custom roles that have unique permissions.
- User Groups allow you to group users together.
- IP Blocking allows you to prevent users from logging in with certain IP addresses.
- Ticket Settings allow you to setup email piping for clients. (iMAP)
- Invoice Settings allow you to change the invoice logo and default address, enable/disable payment gateways.
- Optional Google ReCaptcha implementation
- Date format section allows you to easily set how you want dates to be displayed.

- **Calendar**

- Full featured Calendar. Add/Edit/Delete events.
- View events by project.
- Can be used with Google Calendar.

- **Tasks**

- Add Tasks and Objectives to Projects
- Assign groups of users to Tasks.
- Set the completion of each task.
- Set status of each Task.
- View your own Assigned Tasks.
- Add Objectives to tasks (sub-tasks).
- Log time for each Task.
- Add Comments for each Task.
- Get notifications when Tasks are updated.

- **Live Chat**

- Open up live chat sessions with any registered user on TDesign CRM.
- Create instant group chats with everyone in your Project teams.
- See a list of online users that you can chat with.
- Have multiple chat windows open at the same time.
- Disable Live Chat in Admin panel
- Restrict who can use Live Chat by giving users the Live Chat User Role.

- **File Manager**

- A virtual file system allows you to upload files.
- Create folders to organize files.
- Assign files and folders to projects.
- Specify which files can be uploaded in Admin Panel.
- Add notes to Files for others to view.

- **Team**

- Manage the teams of individual Projects.
- Create Project Roles that give permissions for specific projects.
- Change the role of each member in the Project Team.
- Add/Edit/Delete members from Projects.

- **Timers**

- Log the amount of time you spend on Projects.
- Easily stop and start timers from top navigation bar.
- Add in an hourly rate to work how much you are owed.
- View Stats on how much time you have spent every month.

- **Ticket System**

- Fully functioning support ticket system.
- Create new tickets for clients or have them create tickets themselves.
- Assign Priority and status to individual tickets.
- Assign a user to a ticket to handle.
- View Assigned Tickets.
- Add Custom Fields for Tickets.
- Reply to tickets and get notifications+emails.
- Option to setup iMap email piping for client responses.
- Create Departments to organize tickets further.

- **Finance System**

- Keep track of your finances by adding costs and revenue entries.
- Assign entries to specific projects.
- Dashboard produces beautiful graph of your years finances.
- Organize with Categories

- **Invoice System**

- Create Invoices that can be paid with PayPal, Stripe or 2Checkout.
- Automatically set Invoice to paid by using PayPal's IPN system, Stripe's API or 2Checkouts API.
- Two different Tax options.
- Add items to invoices.
- Create Invoice Templates.
- Create Reoccurring Invoices.
- Download Invoices as PDFs.
- View Web Version of Invoices to send to clients.

- **Notes Section**

- Create notes for Projects.
- View Notes/Edit/Delete.
- Edit notes has auto-save feature that auto-saves the document for you every 30 seconds. Can be turned off/on
- Restrict access to notes with permissions.

- **Lead System**

- Create custom forms that allow you to receive leads/feedback.
- Create Input Boxes, Radio/Checkboxes, Select dropdowns, textareas.
- Assign a user to a form so they get alerted to new responses.
- Lead Form can be filled out by guests (non-logged in users). Special URL given.
- View all lead responses. Mark them as Read/Unread.
- Custom Status and Sources
- Add notes to individual leads.
- Convert lead to client.

- **Services Section**

- Create services for customers to order.
- Create custom built forms; input boxes, checkbox, textareas, dropdowns.
- Invoice auto-generated on order. User can pay using either PayPal, Stripe or 2Checkout payment gateways.
- View all orders in the Orders Section.
- Send reminders of unpaid invoices.
- Assign a user to a service so they get notified of when there is a new order.
- Send your service forms out to anyone; they don't have to be registered to submit an order.

- Can enable login requirement for services.

- **Reports Section**

- Ticket Reports showing the amount of opened and closed tickets
- Finance Report shows how much revenue and expenses.
- Invoices show how many paid and unpaid invoices you have.
- Time Reports show logged time for all users, specific users and by project.
- All reports can have a specific time range applied to them.

- **Mailbox**

- Send Messages to any user on the system.
- View all your messages in a beautiful designed inbox.
- Block List to block users.
- Get notifications when you receive new messages.

- **Translation Ready**

- Easy translate the entire system by modifying our translation files (just 3 to edit!)
- Allow users to switch between a language of their choice using our unique Language Switcher.
- Supports any UTF-8 language!
- Documentation Guide to walk you through how to translate.

- **System**

- Built on CodeIgniter 3.1.4
- Built on Bootstrap 3.3.4
- Translation Ready
- Requires PHP 5.4 and a MySQL database.
- Supports MySQL, Mysqli and PDO drivers.
- Supports SMTP Email, PHP Mail()

- **Current Implemented Languages**

- English
- Spanish