

# Professional CRM

## (PHP based Customer Relationship Management Script)





## Welcome

Welcome to PHP based Customer Relationship Management Script!

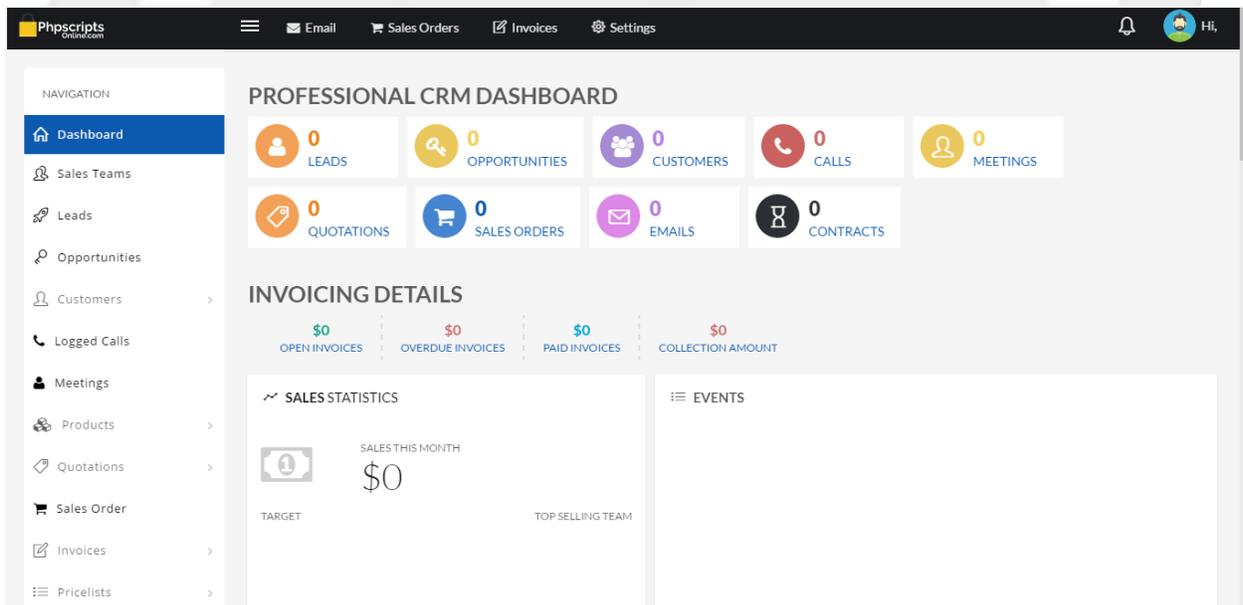
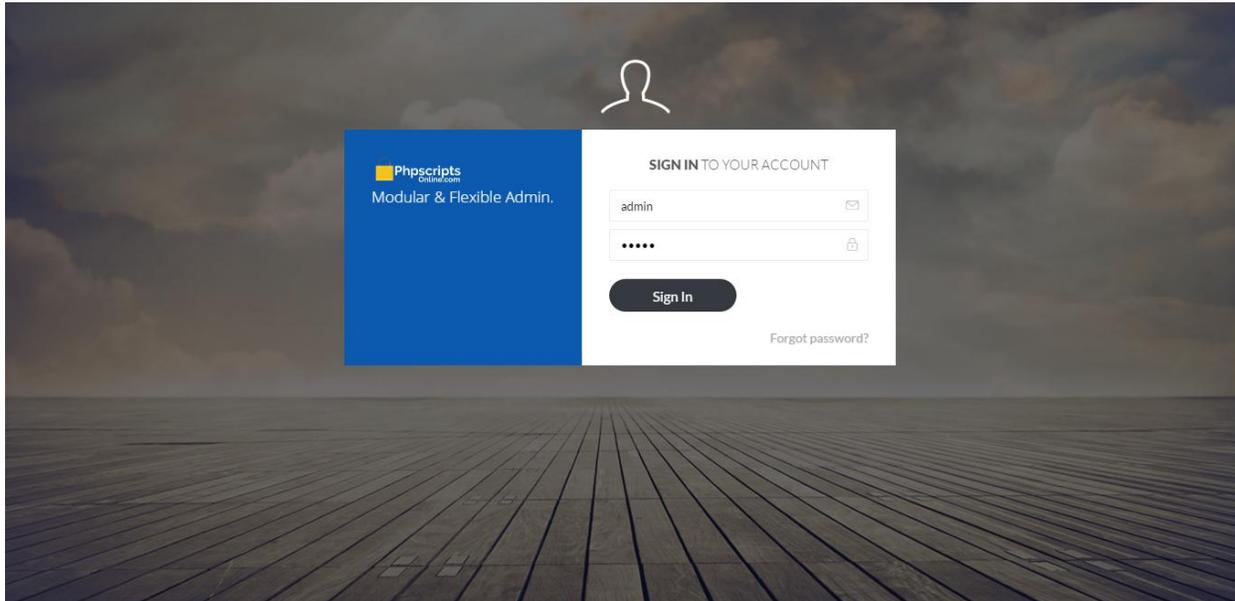
Professional CRM is a customer relationship management platform built for the way businesses work now. It's mobile, intuitive, and completely automated so that your team has the time to focus on strengthening client relationships while Professional CRM does the rest. This CRM is mobile responsive design and it's developed in Codelgniter PHP framework with MySQL Database.

Professional CRM software helps businesses improve customer relationships by organising and automating communications and activities across all departments. Store and manage all your business contacts in one place. All relationships, not just customers, manage contacts, leads, customers, vendors and more. It covers following key features:

- Attractive Dashboard
- Manage Sales Team
- Leads
- Opportunities
- Customers
- Logged Calls
- Meetings
- Emails and Calls
- Manage Products
- Quotations
- Sales Order
- Invoices
- Price Lists Versions
- Contracts
- Calendar
- Manage Staff

## 1 | ADMIN LOGIN

Admin has all privileges to control entire system to adding customers, quotes, generate invoices, payments & manage user and system settings.





# PROFESSIONAL CRM Enterprise Script

The screenshot shows the 'PROFESSIONAL CRM DASHBOARD'. At the top, there is a navigation bar with 'Email', 'Sales Orders', 'Invoices', and 'Settings'. The dashboard features several key performance indicators (KPIs) in a grid:

- LEADS: 0
- OPPORTUNITIES: 0
- CUSTOMERS: 0
- CALLS: 0
- MEETINGS: 0
- QUOTATIONS: 0
- SALES ORDERS: 0
- EMAILS: 0
- CONTRACTS: 0

Below the KPIs is the 'INVOICING DETAILS' section, which includes:

- OPEN INVOICES: \$0
- OVERDUE INVOICES: \$0
- PAID INVOICES: \$0
- COLLECTION AMOUNT: \$0

The dashboard also contains two main content areas:

- SALES STATISTICS:** Shows 'SALES THIS MONTH' as '\$0' and 'TOP SELLING TEAM'.
- EVENTS:** A section for tracking events.

A vertical sidebar on the left contains various icons for navigation.

The screenshot shows the 'SALESTEAMS PERFORMANCE' section. At the top, there is a navigation bar with 'Phpscripts Online.com', 'Email', 'Sales Orders', 'Invoices', and 'Settings'. The main content area is titled 'SALESTEAMS PERFORMANCE' and is currently empty.

At the bottom of the section, there are three filterable categories:

- LEADS:** Includes buttons for 'Mine' and 'SALES TEAM'.
- OPPORTUNITIES:** Includes buttons for 'Mine' and 'SALES TEAM'.
- CALLS LOG:** A section for viewing call logs.

A vertical sidebar on the left contains various icons for navigation.



# PROFESSIONAL CRM Enterprise Script

The dashboard features a top navigation bar with the Phpscripts logo and menu items for Email, Sales Orders, Invoices, and Settings. A user profile icon shows 'Hi'. The main area contains six overview cards: 'OPEN LEADS', 'OPEN OPPORTUNITIES', 'OPEN CALLS LOG', 'CONTRACTS', 'QUOTATIONS', and 'INVOICES'. The 'QUOTATIONS' and 'INVOICES' cards include 'Mine' and 'SALES TEAM' buttons.

## MANAGE LEADS

The 'Manage Leads' page includes a left sidebar with a 'NAVIGATION' menu containing: Dashboard, Sales Teams, Leads (highlighted), Opportunities, Customers, Logged Calls, Meetings, Products, Quotations, Sales Order, Invoices, and Pricelists. The main content area is titled 'Leads' and features a 'Create New' button, a dropdown menu set to '10', and a search bar. Below these is a table with the following columns: CREATION DATE, OPPORTUNITY, CONTACT NAME, COUNTRY, EMAIL, PHONE, SALES TEAM, and OPTIONS. The table currently displays 'No data available in table' and 'Showing 0 to 0 of 0 entries'. A 'Prev Next' pagination control is at the bottom right. A footer note reads: 'Copyright © 2016 Professional CRM. All rights reserved.'



## OPPORTUNITIES

The screenshot shows the 'Opportunities' page in a CRM system. At the top, there is a navigation bar with 'Pphscripts Online.com', a menu icon, and links for 'Email', 'Sales Orders', 'Invoices', and 'Settings'. On the right of the bar are a notification bell and a user profile icon labeled 'Hi'. A left-hand navigation menu lists various modules: Dashboard, Sales Teams, Leads, Opportunities (highlighted), Customers, Logged Calls, Meetings, Products, Quotations, Sales Order, Invoices, and Pricelists. The main content area is titled 'Opportunities' and features a 'Create New' button. Below the title is a table with a dropdown menu set to '10' and a search box. The table headers are: OPPORTUNITY, CUSTOMER, NEXT ACTION DATE, NEXT ACTION, STAGES, EXPECTED REVENUE, PROBABILITY, SALES TEAM, and OPTIONS. The table body contains the text 'No data available in table' and 'Showing 0 to 0 of 0 entries'. At the bottom of the page, there is a copyright notice: 'Copyright © 2016 Professional CRM. All rights reserved.'

## CUSTOMERS

The screenshot shows the 'Customers' page in the CRM system. The top navigation bar is identical to the Opportunities page. The left-hand navigation menu is also identical, but 'Customers' is highlighted. The main content area is titled 'Customers' and features two buttons: 'New Customer' and 'New Contact Person'. Below the title is a table with a dropdown menu set to '10' and a search box. The table headers are: COMPANY, CONTACT PERSON, PHONE, and OPTIONS. The table body contains the text 'No data available in table' and 'Showing 0 to 0 of 0 entries'. At the bottom of the page, there is a copyright notice: 'Copyright © 2016 Professional CRM. All rights reserved.'



## LOGGED CALLS

Phpscripts Online.com

NAVIGATION

- Dashboard
- Sales Teams
- Leads
- Opportunities
- Customers
- Logged Calls**
- Meetings
- Products
- Quotations
- Sales Order
- Invoices
- Pricelists

### Logged Calls

Create New

10 Search...

DATE	CALL SUMMARY	CONTACT	RESPONSIBLE	OPTIONS
No data available in table				

Showing 0 to 0 of 0 entries

Prev Next

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## MEETINGS

Phpscripts Online.com

NAVIGATION

- Dashboard
- Sales Teams
- Leads
- Opportunities
- Customers
- Logged Calls
- Meetings**
- Products
- Quotations
- Sales Order
- Invoices
- Pricelists

### Meetings

Create New

10 Search...

SUBJECT	START DATE	END DATE	RESPONSIBLE	OPTIONS
No data available in table				

Showing 0 to 0 of 0 entries

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## MANAGE PRODUCTS

Products

10

Search...

NAME	INTERNAL CATEGORY	PRODUCT TYPE	STATUS	QUANTITY ON HAND	QUANTITY AVAILABLE	OPTIONS
No data available in table						

Showing 0 to 0 of 0 entries

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Update Product

Update Successful

Product Name: Material-plant1

Product Image: no file selected

Internal Category: Materials

Status: [Dropdown]

Quantity On Hand: 0

Quantity Available: 0

Information | Sales | Variants

Product Type: Consumable

Active:

Sale Price: 1430



## QUOTATIONS

The screenshot shows the 'Quotations' page in the CRM. The top navigation bar includes 'Email', 'Sales Orders', 'Invoices', and 'Settings'. A sidebar on the left lists navigation options: Dashboard, Sales Teams, Leads, Opportunities, Customers, Logged Calls, Meetings, Products, Quotations (selected), Quotations Template, and Sales Order. The main content area is titled 'Quotations' and features a 'Create New' button. Below the title are filters for 'Start Date' and 'End Date', a dropdown menu set to '10', and a search bar. A table header is visible with columns: QUOTATIONS NUMBER, DATE, CUSTOMER, SALESPERSON, TOTAL, STATUS, and OPTIONS. The table content is empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'. A copyright notice at the bottom reads 'Copyright © 2016 Professional CRM. All rights reserved.'

The screenshot shows the 'Add Quotation' form. The top navigation bar and sidebar are identical to the previous screenshot. The main content area is titled 'Add Quotation' and contains several form fields: 'Customer' (Phpscriptsonline Pvt Ltd), 'Date' (08/01/2016 5:43), 'Expiration Date' (01/01/1970), 'Salesperson', 'Sales Team', 'Quotation Template', 'Pricelist', 'Payment Term', and 'Status' (Draft Quotation). Below these fields is an 'Order' table with columns: PRODUCT, DESCRIPTION, QUANTITY, UNIT PRICE, TAXES, and SUBTOTAL. The table contains one row with the following data: PRODUCT: MaterialLabel1, DESCRIPTION: (empty), QUANTITY: 1, UNIT PRICE: 1430.00, TAXES: 928.80, SUBTOTAL: 1430.00.



# PROFESSIONAL CRM Enterprise Script

Phpscripts Online.com

Navigation: Email, Sales Orders, Invoices, Settings

Quotations Template

- Sales Order
- Invoices
- Pricelists
- Contracts
- Calendar
- Staff

### Order

PRODUCT	DESCRIPTION	QUANTITY	UNIT PRICE	TAXES	SUBTOTAL
Material-plant1		1	1430.00	228.80	1430.00

[Add on product](#)

Untaxed Amount: 1430.00

Taxes: 228.80

Terms and Conditions

Total (Update): 1658.80

[Create](#)

## SALES ORDER

Phpscripts Online.com

Navigation: Email, Sales Orders, Invoices, Settings

### Sales Orders

[Create New](#)

Start Date:

End Date:

10

ORDER NUMBER	DATE	CUSTOMER	SALESPERSON	TOTAL	STATUS	OPTIONS
No data available in table						

Showing 0 to 0 of 0 entries [Prev](#) [Next](#)

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NAVIGATION

- Dashboard
- Sales Teams
- Leads
- Opportunities
- Customers
- Logged Calls
- Meetings
- Products
- Quotations
- Sales Order**
- Invoices
- Pricelists



# PROFESSIONAL CRM Enterprise Script

Phpscripts Online.com | Email | Sales Orders | Invoices | Settings | Hi

**NAVIGATION**

- Dashboard
- Sales Teams
- Leads
- Opportunities
- Customers
- Logged Calls
- Meetings
- Products
- Quotations**
  - Quotations
  - Quotations Template
- Sales Order

## Quotation SO001

Expired | Send by Email | Print | Confirm Sale | Edit

**Customer** Phpscriptsonline Pvt Ltd  
No.16, Officers Colony, I Main Road, Adambakkam, Chennai

**Date** 08/01/2016 05:54  
**Expiration Date** 01/01/1970  
**Salesperson** Jeniffer Larson  
**Sales Team** John Deo

**Quotation Template**  
**Pricelist**  
**Payment Term** 10 Days  
**Status** Draft Quotation

**Order**

PRODUCT	DESCRIPTION	QUANTITY	UNIT PRICE	TAXES	SUBTOTAL
Material-plant1		1	1430.00	228.80	1430.00
<b>Terms and Conditions</b>					
Untaxed Amount					1430.00
Taxes					228.80
<b>Total</b>					<b>1658.80</b>

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## INVOICES

Phpscripts Online.com | Email | Sales Orders | Invoices | Settings | Hi

**NAVIGATION**

- Dashboard
- Sales Teams
- Leads
- Opportunities
- Customers
- Logged Calls
- Meetings
- Products
- Quotations
- Sales Order
- Invoices**
  - Invoices

## Invoices

RECEIVE PAYMENT

\$0 OPEN INVOICES | \$0 OVERDUE INVOICES | \$0 PAID INVOICES | \$0 COLLECTION AMOUNT

Start Date: [Calendar] End Date: [Calendar]

10 [Dropdown] Search...

INVOICE NUMBER	DATE	CUSTOMER	DUE DATE	BALANCE	STATUS	RECEIVE PAYMENTS	OPTIONS
No data available in table							

Showing 0 to 0 of 0 entries | Prev Next

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## PAYMENT LOG

The screenshot shows the 'Payments Log' page. At the top, there is a navigation bar with 'Phpscripts Online.com', a menu icon, and links for 'Email', 'Sales Orders', 'Invoices', and 'Settings'. On the right of the navigation bar, there are notification and user profile icons. A left sidebar contains a 'NAVIGATION' menu with items like 'Dashboard', 'Sales Teams', 'Leads', 'Opportunities', 'Customers', 'Logged Calls', 'Meetings', 'Products', 'Quotations', 'Sales Order', and 'Invoices' (which is highlighted). The main content area is titled 'Payments Log' and features a table with columns: AMOUNT, INVOICE NUMBER, COMPANY NAME, STAFF USER, and OPTIONS. The table is currently empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'. A search bar and a '10' dropdown menu are located above the table. A 'Create New' button is visible in the top right corner of the main content area. The footer of the page contains the text 'Copyright © 2016 Professional CRM. All rights reserved.'

## PRICE LISTS

The screenshot shows the 'Pricelists' page. The navigation bar and sidebar are identical to the previous screenshot. The main content area is titled 'Pricelists' and features a table with columns: PRICELIST NAME, STATUS, and OPTIONS. The table is currently empty, displaying 'No data available in table' and 'Showing 0 to 0 of 0 entries'. A search bar and a '10' dropdown menu are located above the table. A 'Create New' button is visible in the top right corner of the main content area. The footer of the page contains the text 'Copyright © 2016 Professional CRM. All rights reserved.'



## CONTRACTS

Phpscripts Online.com

Email Sales Orders Invoices Settings

Hi

Leads Opportunities Customers Logged Calls Meetings Products Quotations Sales Order Invoices Pricelists **Contracts** Calendar Staff

10 Search...

START DATE	DESCRIPTION	CONTACT	RESPONSIBLE	OPTIONS
No data available in table				

Showing 0 to 0 of 0 entries

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## CALENDAR

Phpscripts Online.com

Email Sales Orders Invoices Settings

Hi

NAVIGATION

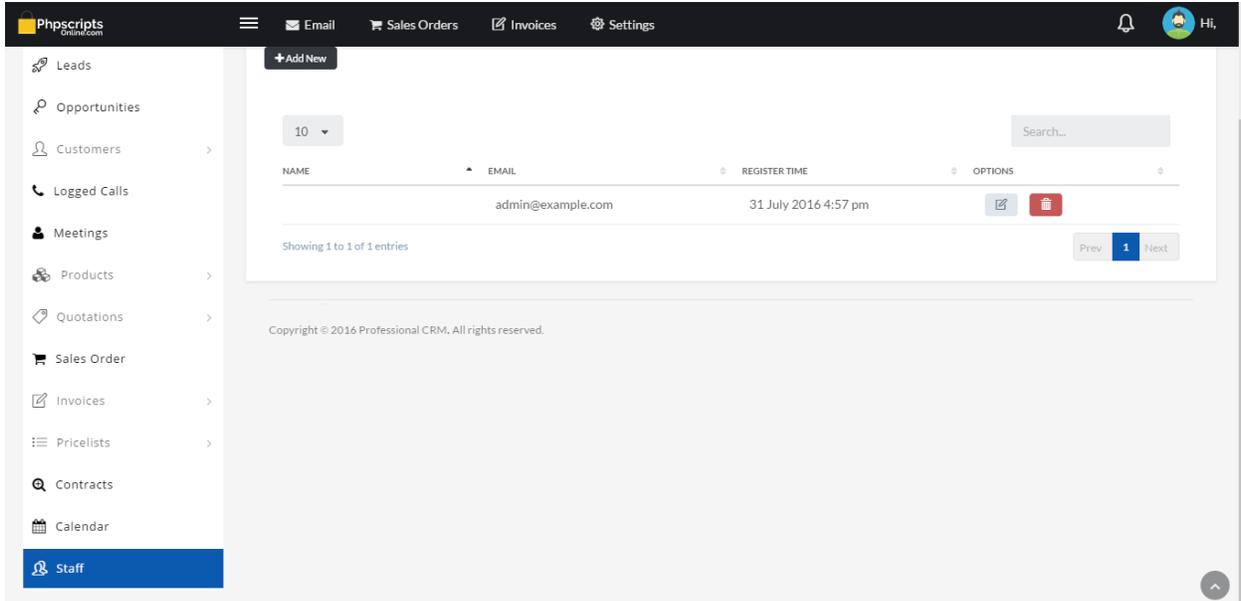
Dashboard Sales Teams Leads Opportunities Customers Logged Calls Meetings Products Quotations Sales Order Invoices Pricelists

< > today August 2016 month week day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

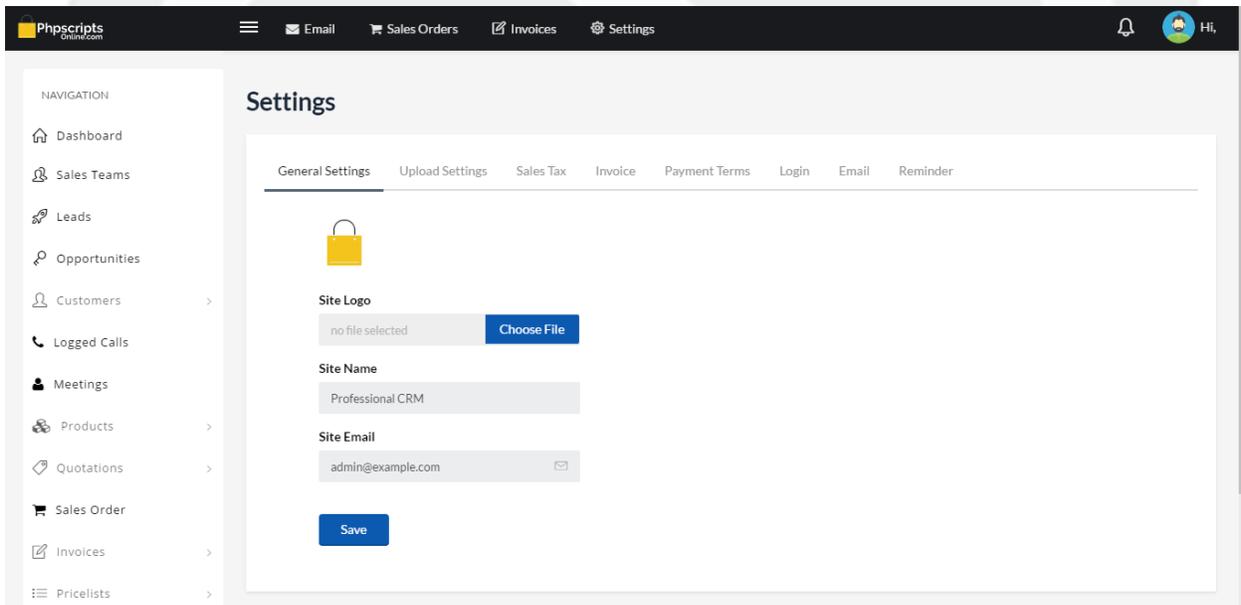
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## STAFFS



The screenshot shows the 'STAFFS' management interface. At the top, there is a navigation bar with 'Phpscripts Online.com', a menu icon, and links for 'Email', 'Sales Orders', 'Invoices', and 'Settings'. A user profile 'Hi.' is visible in the top right. A left sidebar contains a navigation menu with items like 'Leads', 'Opportunities', 'Customers', 'Logged Calls', 'Meetings', 'Products', 'Quotations', 'Sales Order', 'Invoices', 'Pricelists', 'Contracts', 'Calendar', and 'Staff' (which is highlighted). The main content area features a '+Add New' button, a dropdown menu set to '10', and a search bar. Below this is a table with columns for 'NAME', 'EMAIL', 'REGISTER TIME', and 'OPTIONS'. One entry is shown with 'EMAIL' as 'admin@example.com' and 'REGISTER TIME' as '31 July 2016 4:57 pm'. The table includes pagination controls showing 'Showing 1 to 1 of 1 entries' and 'Prev 1 Next'. A copyright notice 'Copyright © 2016 Professional CRM. All rights reserved.' is at the bottom.

## SETTINGS



The screenshot displays the 'Settings' configuration page. The top navigation bar is identical to the Staffs page. The left sidebar shows a 'NAVIGATION' section with items: 'Dashboard', 'Sales Teams', 'Leads', 'Opportunities', 'Customers', 'Logged Calls', 'Meetings', 'Products', 'Quotations', 'Sales Order', 'Invoices', and 'Pricelists'. The main content area is titled 'Settings' and has a sub-menu with 'General Settings' (selected), 'Upload Settings', 'Sales Tax', 'Invoice', 'Payment Terms', 'Login', 'Email', and 'Reminder'. The 'General Settings' section includes a 'Site Logo' field with a yellow padlock icon, a 'no file selected' message, and a 'Choose File' button. Below it is the 'Site Name' field containing 'Professional CRM'. The 'Site Email' field contains 'admin@example.com' with an envelope icon. A 'Save' button is located at the bottom of the settings area.



## Contact

More details about Professional CRM or live demo, please contact us.

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