

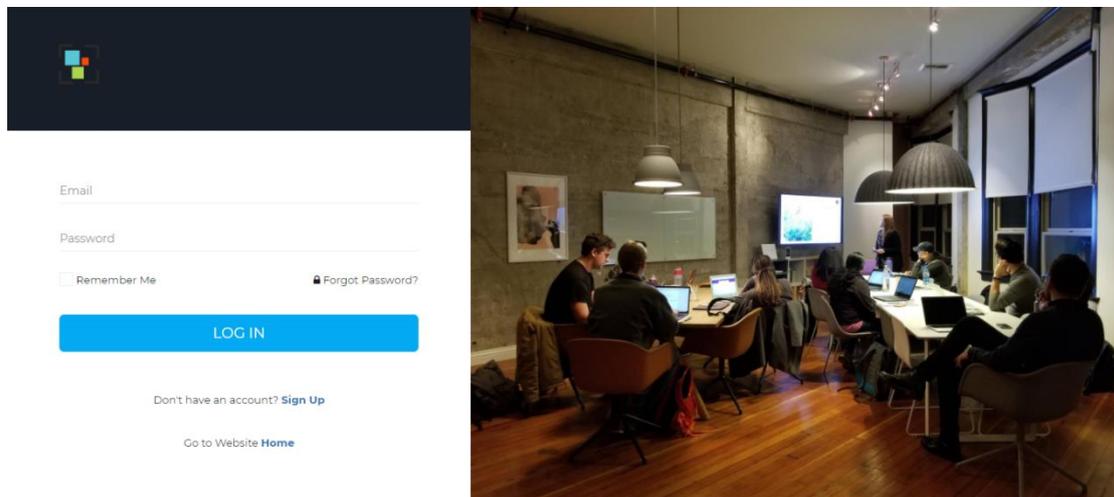
Collaborate,manage projects,create leads and tasks, reach new productivity peaks - accomplish it all with Keva.

KEVA SOFTWARE USER GUIDE:

A Step-by-Step Guide to Project Management Keva software - Admin Panel

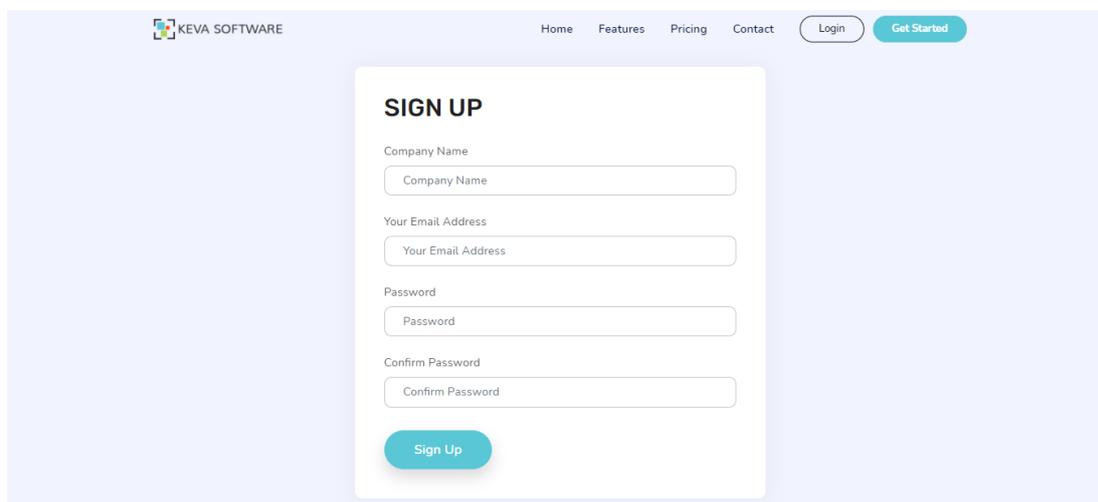
LOGIN:

Login with your registered email and password.If you're a new user click on the 'sign up' option, present below the login option of the login panel.



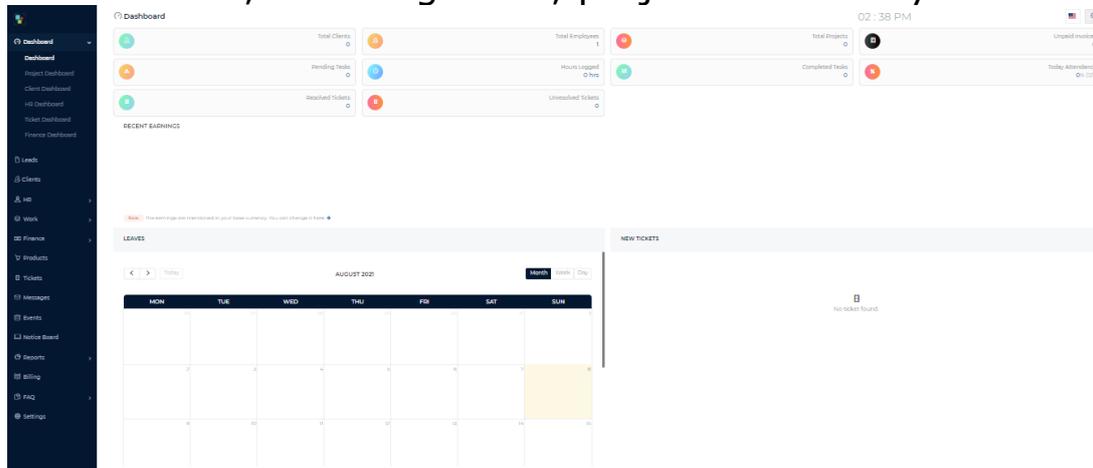
SIGNUP:

The signup panel appears as the attached screenshot. Register with the company name,address and password.



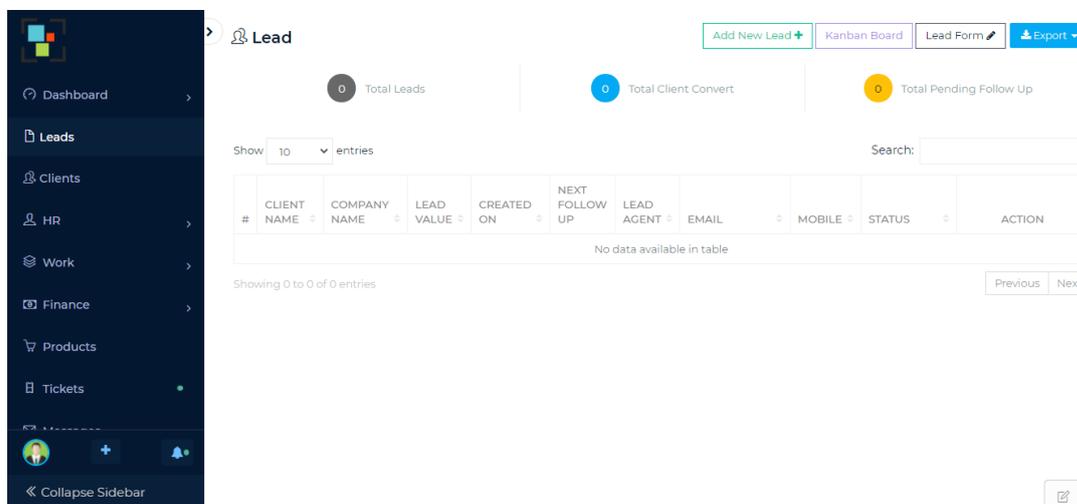
DASHBOARD:

Dashboard displays an overview of what is happening in the software, including tasks, projects and many more.



LEADS:

On-clicking upon the 'Leads' panel below the Dashboard panel, Total Lead, Total client Convert, Total pending follow up can be viewed in the Dashboard.



Add new lead-User can create a new lead by clicking on the 'Add new lead', present on the upper-right corner of the panel.

User can also export the data of leads in forms of CSV and excel files. Filter, search, edit options are also available to access and view the leads data.

CLIENTS:

The 'Client panel' displays the Total Clients present.

#	NAME	COMPANY NAME	EMAIL	MOBILE	CREATED AT	ACTION
No data available in table						

Add New client-User can create a new client by clicking on the 'Add New client', present on the upper-right corner of the panel.

User can also export the data of leads in forms of CSV and excel files. Filter, search, edit options are also available to access and view the client data.

Clients

ADD CLIENT INFO

CLIENT DETAILS

Client Name *

Client Email *

Client will login using this email.

Password *

Client will login using this password.

Generate Random Password

COMPANY DETAILS

Company Name

Website

HR:

The 'HR panel' ,present below the Clients panel has the following sub-panels where various tasks can be added and performed.

- i. Employee List
- ii. Department
- iii. Designation
- iv. Attendance
- v. Holiday
- vi. Leaves

Add a new employee-Fill out the details after clicking 'Add New employee' in the employee list panel.

Employees

ADD EMPLOYEE INFO

Employee ID *

Employee Name *

Employee Email *

Password *

Employee will login using this email.

Employee will login using this password.

Generate Random Password

* Slack Username

Joining Date *

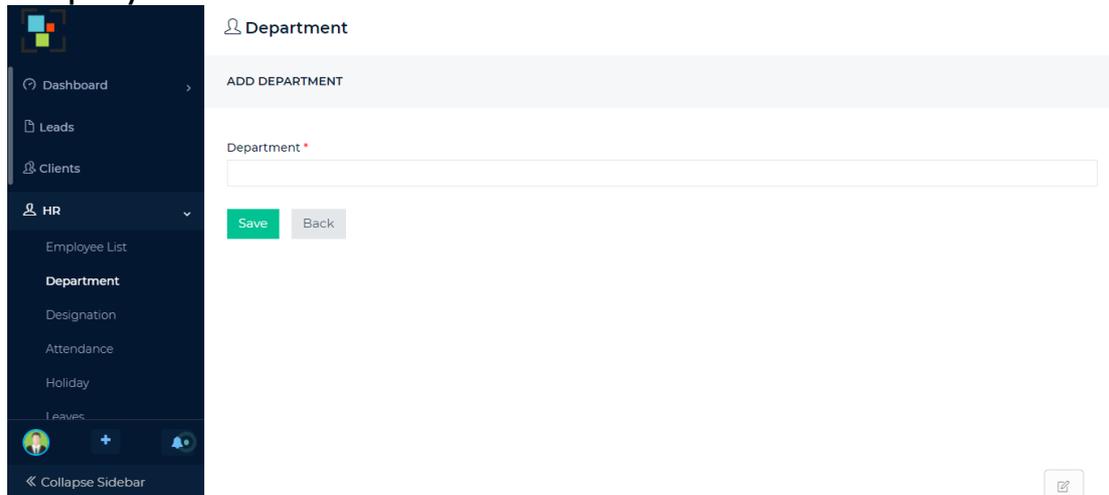
Exit Date

Gender

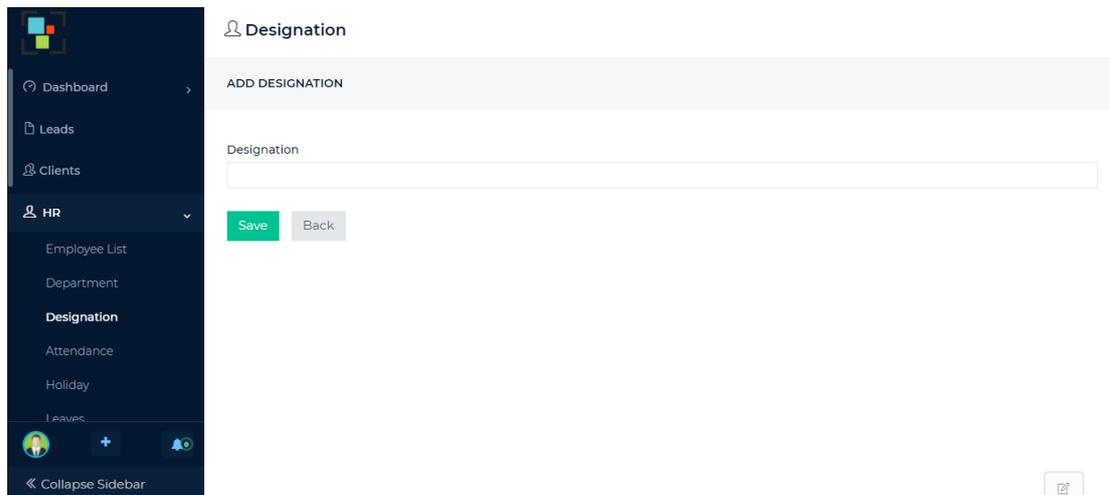
Address

Skills

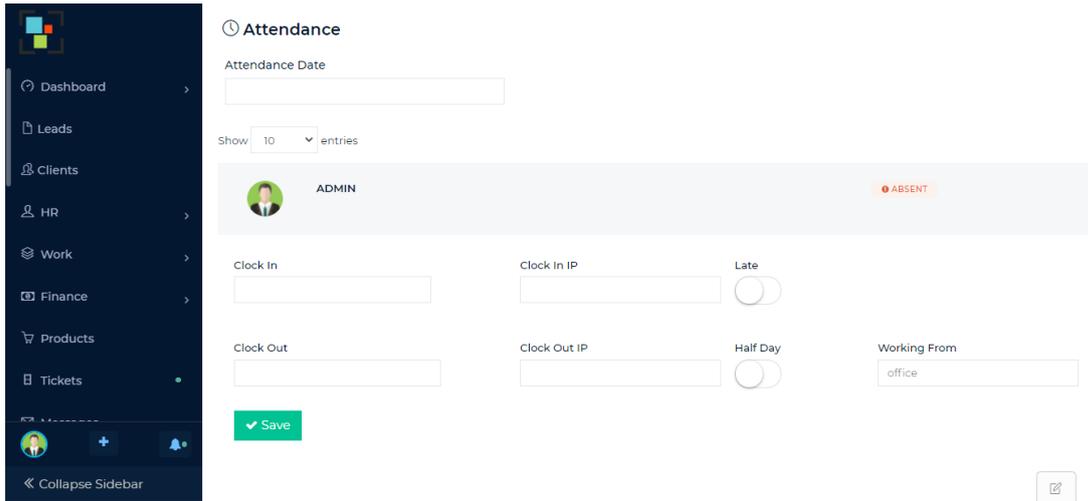
Add department-Under the department sub-panel,user(admin)can create departments for the employees.



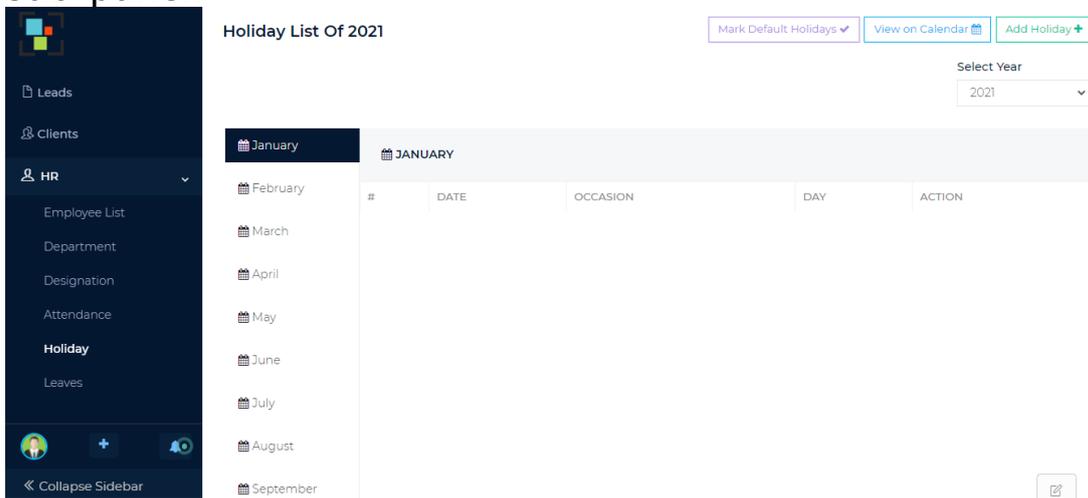
Add Designation-Under the Designation sub-panel,user(admin)can create Designations for the employees.



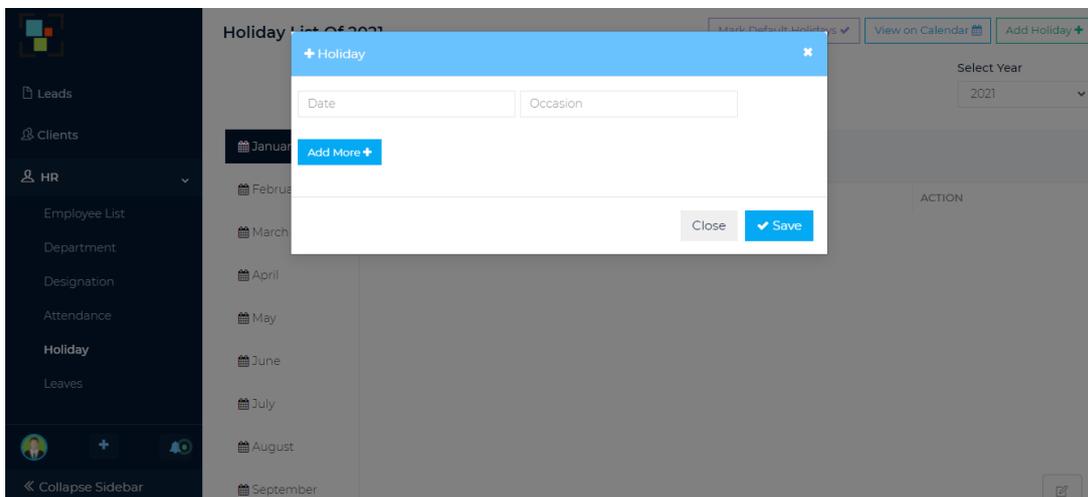
User can view and mark attendance in the attendance sub-panel.Fill out the following details to mark attendance.



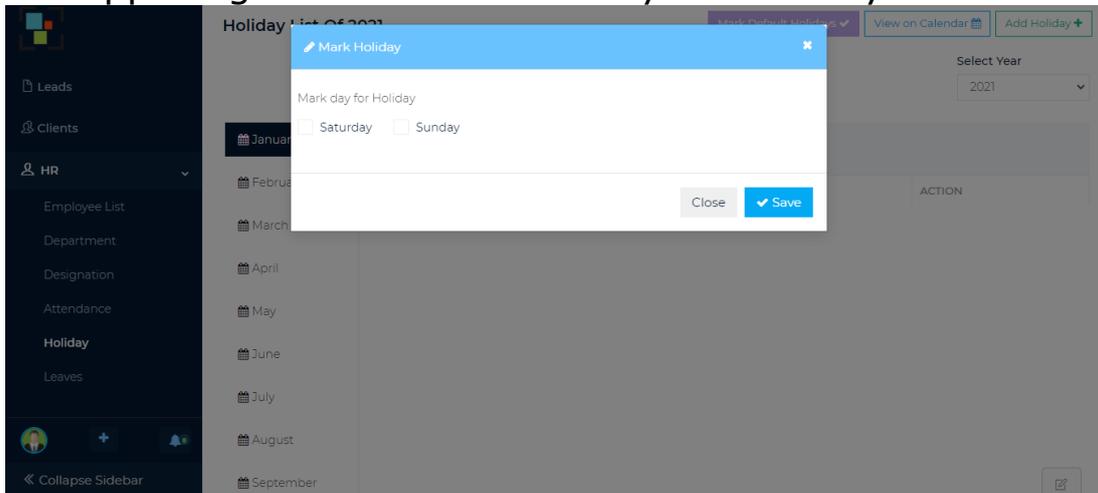
User can view the upcoming holidays in the holiday list sub-panel.



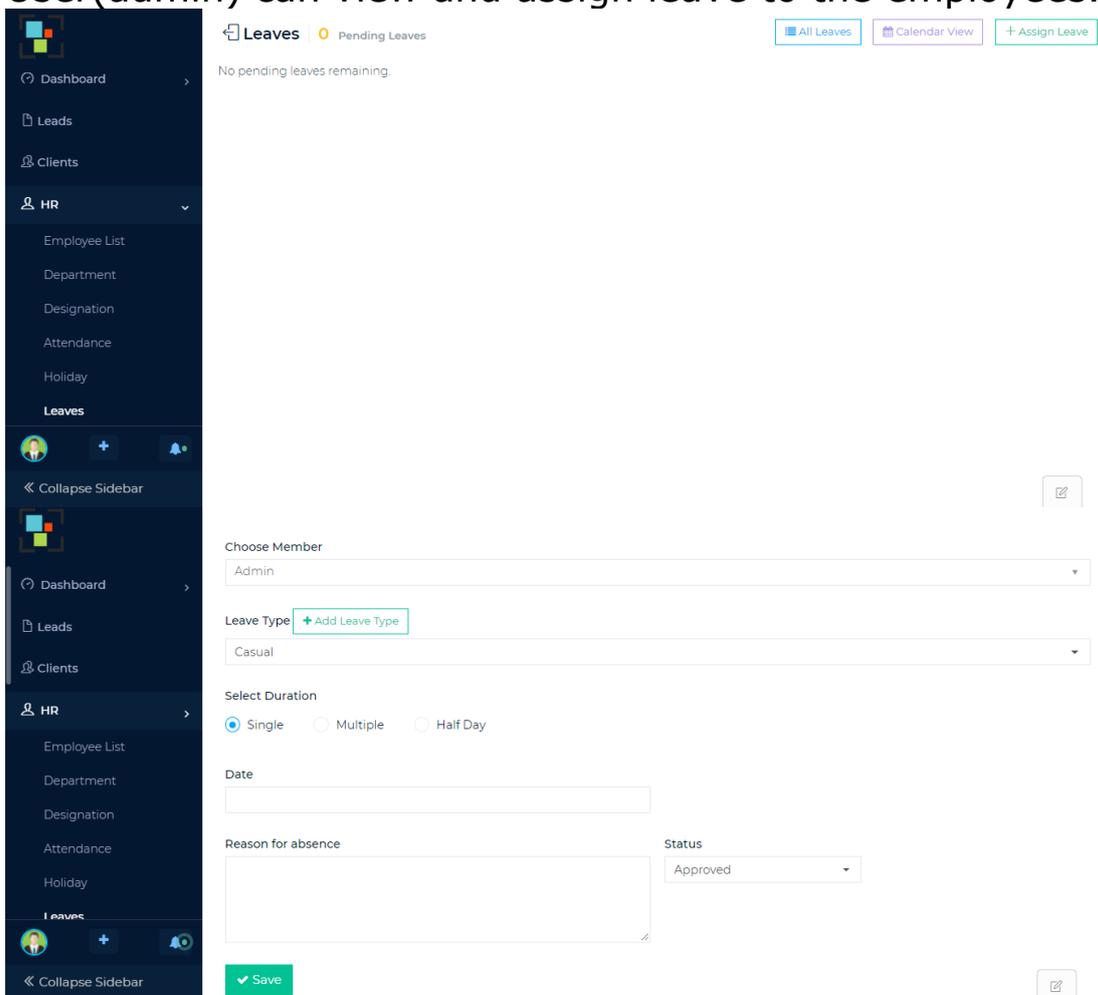
Add a holiday-Click on 'Add holiday' option present in the upper right corner to add holidays in the list.



Mark a holiday-Click on 'Mark holiday' option present in the upper right corner to Mark days as holidays in the list.



User(admin) can view and assign leave to the employees.

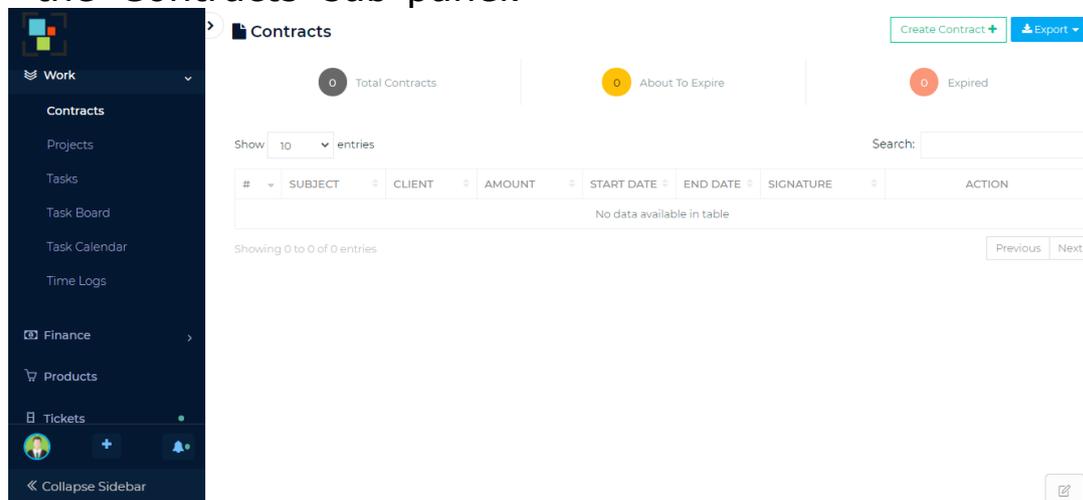


WORK:

The 'Work panel' ,present below the HR panel has the following sub-panels where various tasks can be added and performed.

- i. Contracts
- ii. Projects
- iii. Tasks
- iv. Task Board
- v. Task Calendar
- vi. Time Logs

User can view,create contracts and export the data in the 'Contracts' sub-panel.



User can view,create projects and export the data in the 'Projects' sub-panel.

The image displays two screenshots of a web application interface. The top screenshot shows a 'Projects' dashboard with a sidebar on the left containing navigation options: Dashboard, Leads, Clients, HR, Work (with sub-items: Contracts, Projects, Tasks, Task Board), and a user profile section. The main content area features a 'Projects' header with action buttons: Pinned Project, View Archive, Project Templates, Add, and Export. Below the header are six summary cards: Total Projects (1), Overdue Projects (1), Not Started Projects (1), Finished Projects (0), In Progress Projects (0), and Canceled Projects (0). A table below shows 10 entries, but it is currently empty with the message 'No data available in table'. The bottom screenshot shows the 'Projects' form. It includes an 'ADD PROJECT' button with a 'Template' dropdown. The form fields are: Project Name, Project Category (with a note 'No project category added.'), Start Date, Deadline, and a checkbox for 'Without deadline'. There is also a checkbox for 'Allow manual time logs?' and an 'Add Project Members' section with a 'Choose Members' dropdown. At the bottom, there is a 'Project Summary' section with a rich text editor toolbar.

User can view,create tasks,Task labels and export the data in the 'Tasks' sub-panel.
The tasks can also be viewed in the task board sub-panel.

The image displays a user interface for task management, divided into two main sections: 'NEW TASK' and 'Task Board'.

NEW TASK Section:

- Title:** A text input field.
- Project:** A dropdown menu with a placeholder '--'.
- Task Category:** A dropdown menu with a '+ Task Category' button and the text 'No task category added.'
- Description:** A rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), link, unlink, list, and other editing functions.
- Task Dependency:** A checkbox labeled 'Task is dependent on another task'.

Task Board Section:

- Header:** Includes a date range '21-07-2021 - 20-08-2021', a 'Filter Results' button, and buttons for '+ Task Category', '+ Task', '+ Add Column', and 'Public Task Board'.
- Columns:** Two columns are visible: 'INCOMPLETE' (in red) and 'COMPLETED' (in green). Each column has a gear icon for settings.
- Footer:** A 'My Tasks' button with a dropdown arrow and a 'Collapse Sidebar' button.

User can add tasks in calendar by clicking on '+task' option.

Task Calendar

TASK CALENDAR

Calendar shows the due tasks on their due dates.

Navigation: < > today AUGUST 2021 month week day list

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15

+ New Task

Project: --

Title: *

Description:

Rich text editor: B I U 13+

Make Private Billable Set time estimate

Time logs can be created and exported in the 'Time logs' sub-panel.

Time Logs

Active Timers | Calendar View | Create Invoice | Employee Time Logs | Log Time | Export

Show 10 entries Search:

#	TASK	EMPLOYEES	START TIME	END TIME	TOTAL HOURS	EARNINGS	ACTION
No data available in table							

Showing 0 to 0 of 0 entries Previous Next

FINANCE:

The 'Finance' panel ,present below the Work panel has the following sub-panels where various tasks can be added and performed.

- i. Estimates
- ii. Invoices
- iii. Recurring Invoices
- iv. Payments
- v. Expenses
- vi. Expenses recurring
- vii. Credit note

Under this panel,user can create estimates,invoices,recurring invoices,payment methods that are available,expenses,recurring expenses and the credit note data.

The screenshot shows the 'Estimates' sub-panel within the Finance section. On the left is a dark sidebar with navigation icons for Dashboard, Leads, Clients, HR, Work, and Finance. The Finance section is expanded to show 'Estimates', 'Invoices', 'Recurring Invoice', 'Payments', and 'Expenses'. The main content area is titled 'Estimates' and features a 'Filter Results' panel on the left with options for 'Select Date Range' and 'Status' (set to 'All'). Below the filter are 'Apply' and 'Reset' buttons. To the right of the filter is a 'CREATE ESTIMATE' form with fields for 'Estimate #' (EST#00 2), 'Client' (Choose Client), 'Currency' (₹ (INR)), and 'Valid Till' (04-09-2021). Below the form is an 'Add Products' dropdown and a table with columns: Item, Hsn/Sac, Qty/Hrs, Unit Price, Tax, and Amount. The table has one row with 'Nothing selected' in the Tax column and '0.00' in the Amount column. A 'Description' field is located below the table. At the top right of the Estimates page are 'Create Estimate +' and 'Export' buttons. Below the table is a 'Showing 0 to 0 of 0 entries' message and 'Previous' and 'Next' navigation buttons.

- Dashboard
- Leads
- Clients
- HR
- Work
- Finance**
 - Estimates
 - Invoices**
 - Recurring Invoice
 - Payments
 - Expenses

Collapse Sidebar

Invoices Recurring Invoice Create Time Log Invoice + Add Invoice + Export -

Show 10 entries Search:

#	INVOICE#	PROJECT	CLIENT	TOTAL	INVOICE DATE	STATUS	ACTION
No data available in table							

Showing 0 to 0 of 0 entries Previous Next

Invoices

ADD INVOICE

Invoice # Project Client Name

Invoice Date Due Date Currency

Show Shipping Address

Add Products

Item	Hsn/Sac	Qty/Hrs	Unit Price	Tax	Amount
<input type="text"/>	<input type="text"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="Nothing selected"/>	<input type="text" value="0.00"/>

Description

+ Add Item

Recurring Invoices Add Recurring Invoice + Export -

Show 10 entries Search:

#	CLIENT	PROJECT	TOTAL	INVOICE DATE	STATUS	ACTION
No data available in table						

Showing 0 to 0 of 0 entries Previous Next

- Dashboard
- Leads
- Clients
- HR
- Work
- Finance**
 - Estimates
 - Invoices
 - Recurring Invoice**
 - Payments
 - Expenses

Collapse Sidebar

Recurring Invoices

ADD INVOICE

Project: Client Name: Currency:

Invoice Date: Due Date:

Show Shipping Address

Billing Frequency:

Billing Cycle:

Set -1 for infinite expenses

Client can stop recurring.

- Dashboard
- Leads
- Clients
- HR
- Work
- Finance**
 - Estimates
 - Invoices
 - Recurring Invoice
 - Payments**
 - Expenses

Collapse Sidebar

Payments

[Add Payment +](#) [Export](#)

Show 10 entries Search:

#	INVOICE#	PROJECT	AMOUNT	PAID ON	STATUS	REMARK	ACTION
No data available in table							

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

- Dashboard
- Leads
- Clients
- HR
- Work
- Finance**
 - Estimates
 - Invoices
 - Recurring Invoice
 - Payments**
 - Expenses

Collapse Sidebar

Payments

ADD PAYMENT

Select Project:

Select Invoice:

Paid On:

Currency:

Amount:

Payment Gateway:

Paypal, Authorize.net, Stripe, Bank Transfer, Cash or others.

Filter Results

Select Date Range

Employee: All

Status: All

Project: All

Apply Reset

Expenses Expenses Recurring Add Expense + Export

Show 10 entries Search:

#	PROJECT	ITEM NAME	PRICE	PURCHASED FROM	EMPLOYEES	PURCHASE DATE	STATUS	ACTION
No data available in table								

Showing 0 to 0 of 0 entries Previous Next

Expenses

ADD EXPENSE

Choose Member

Project

Expense Category

Currency

Item Name *

Price *

Expenses

Expenses Recurring Add Recurring Expense + Export

Show 10 entries Search:

#	ITEM NAME	PRICE	EMPLOYEES	CREATED ON	STATUS	ACTION
No data available in table						

Showing 0 to 0 of 0 entries Previous Next

Filter Results

Select Date Range

Employee: All

Status: All

Apply Reset

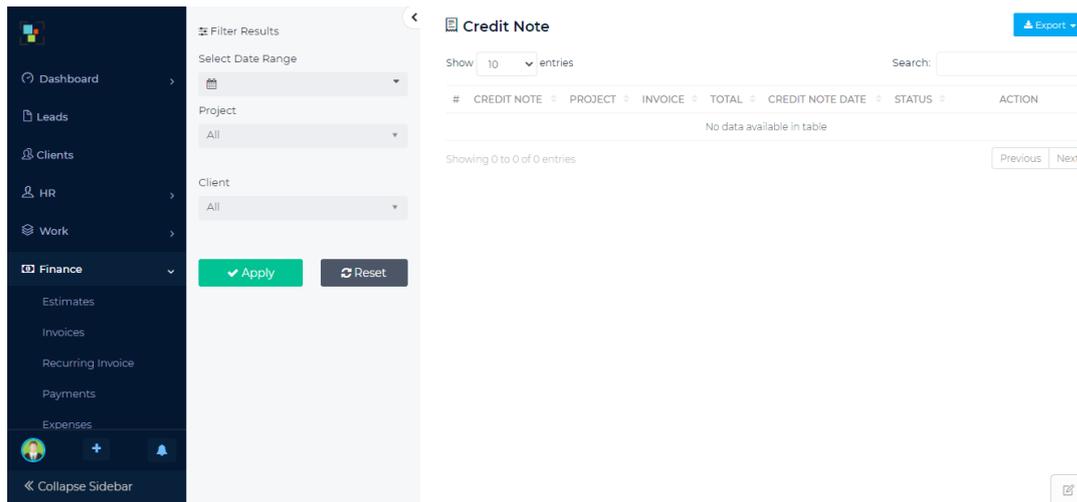
Expenses

Expenses Recurring Add Recurring Expense + Export

Show 10 entries Search:

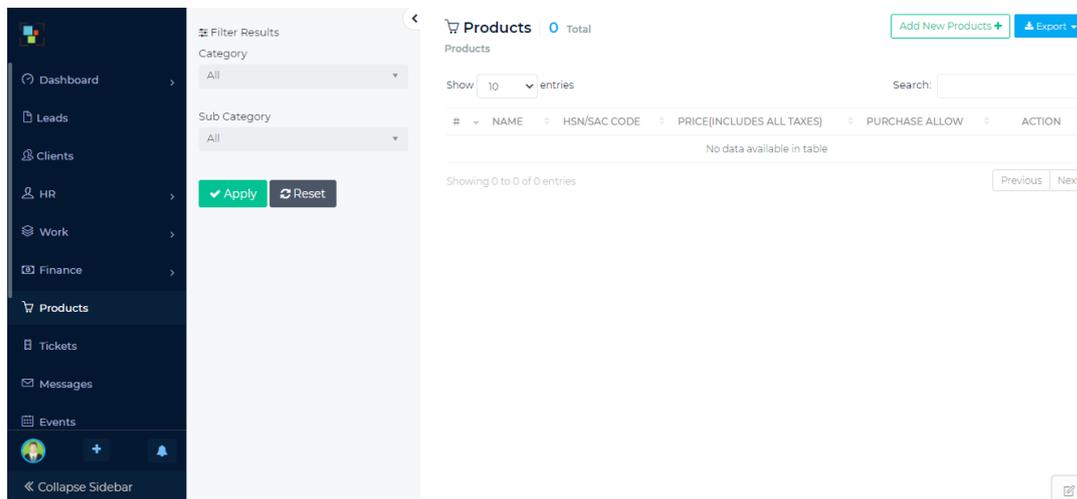
#	ITEM NAME	PRICE	EMPLOYEES	CREATED ON	STATUS	ACTION
No data available in table						

Showing 0 to 0 of 0 entries Previous Next



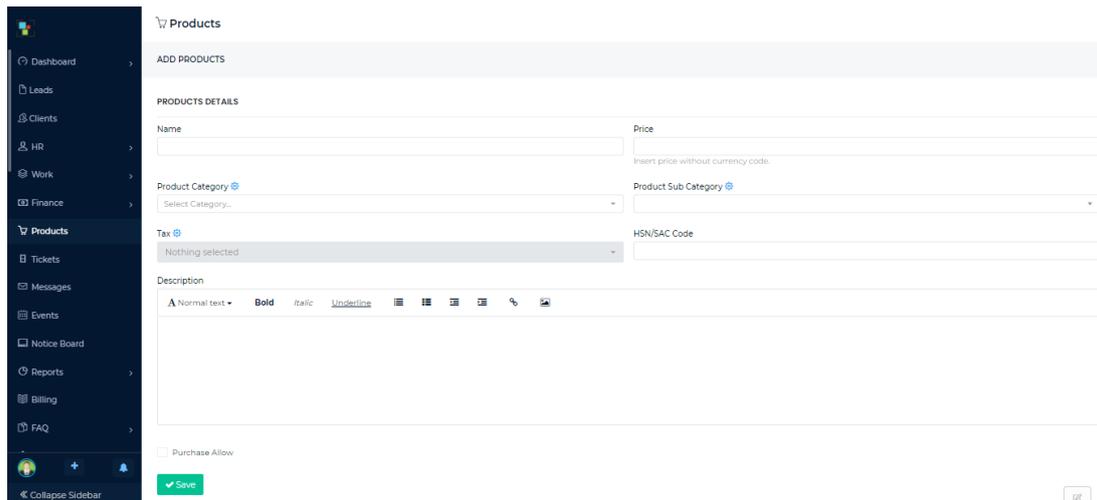
PRODUCTS:

The products panel displays the Total Products present.



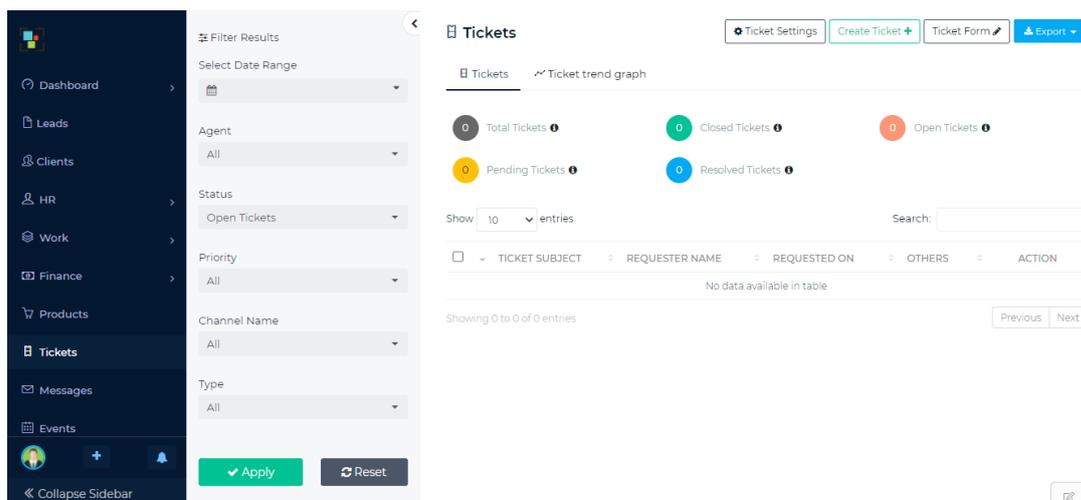
Add New product-User can create a new product by clicking on the 'Add New product', present on the upper-right corner of the panel.

User can also export the data of leads in forms of CSV and excel files. Filter, search, edit options are also available to access and view the product data.

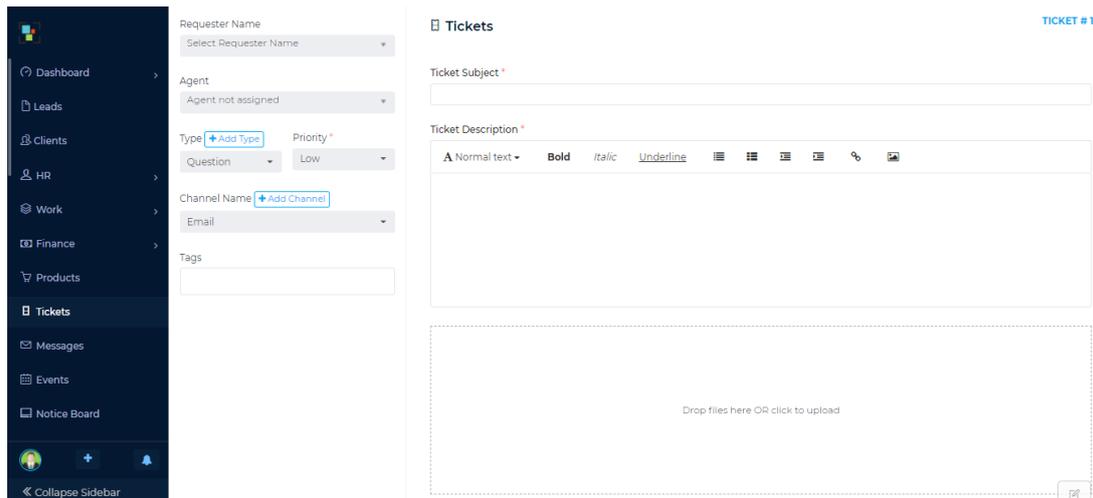


TICKETS:

The user can view the tickets in the ticket dashboard and Change the settings by clicking on 'Ticket Settings' option, where Agents, Types, Channel, Reply templates can be added.



User also create new tickets by clicking on the 'Create ticket' tab present on the upper right corner. The following panel appears:



MESSAGES:

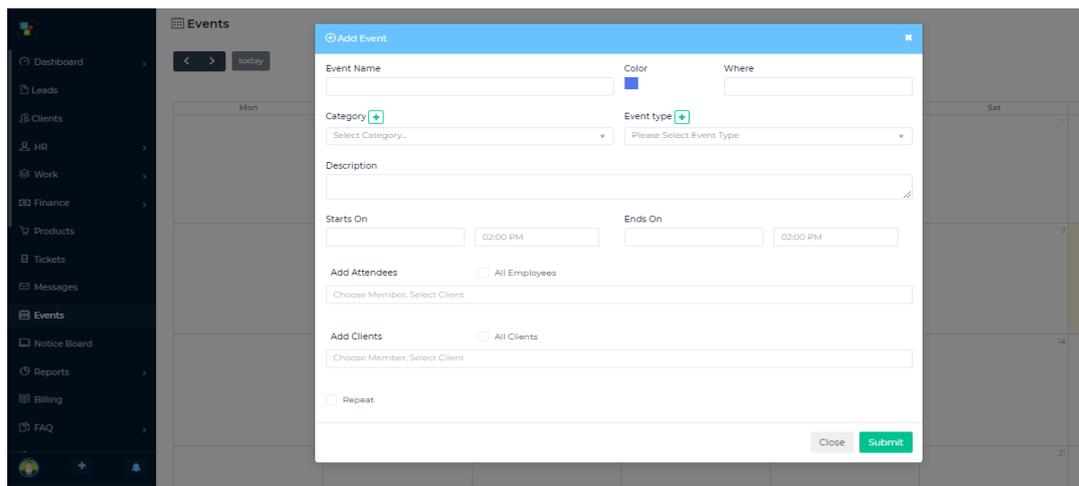
To engage with other users via message, the user will simply click on the 'Message' panel on the left side of the software below Finance.

On-clicking 'Start conversation', user can send message to the desired co-user. (Documents can also be attached)

EVENTS:

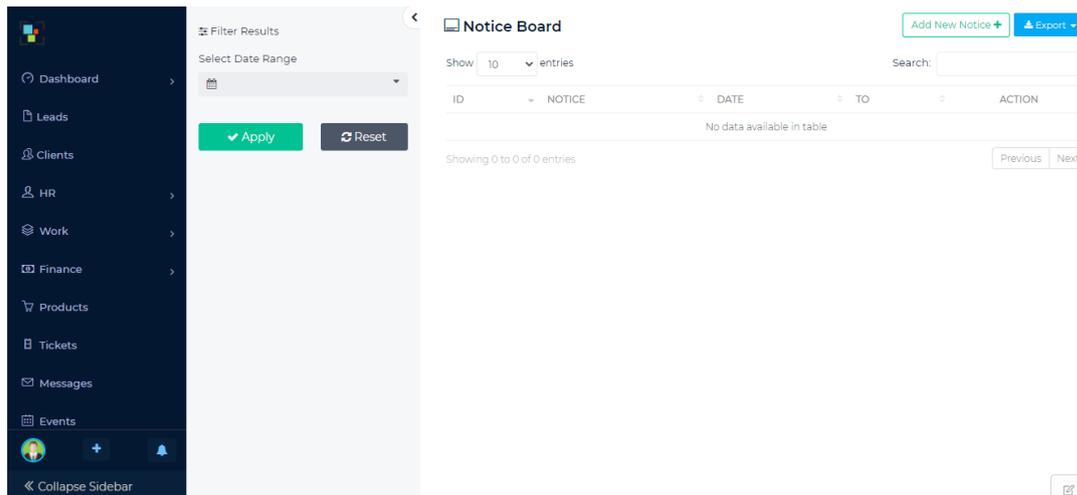
The events panel displays the upcoming events that are added via calendar.

Add new event-User can add a new event by clicking on the 'Add event' option and by filling out the following details.

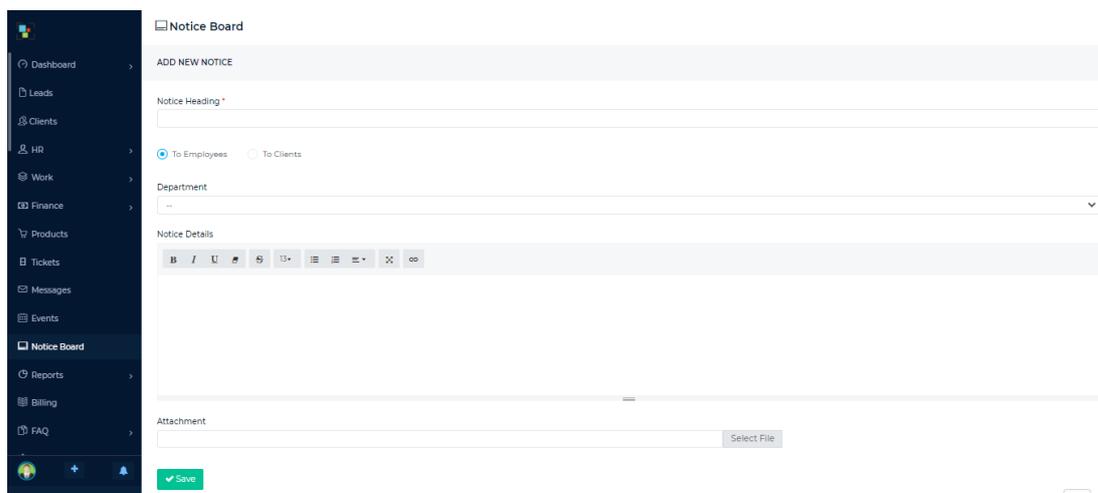


NOTICE BOARD:

The products panel displays the Total Products present.



Add New product-User can create a new product by clicking on the 'Add New product', present on the upper-right corner of the panel. User can also export the data of leads in forms of CSV and excel files. Filter, search, edit options are also available to access and view the product data.



REPORTS:

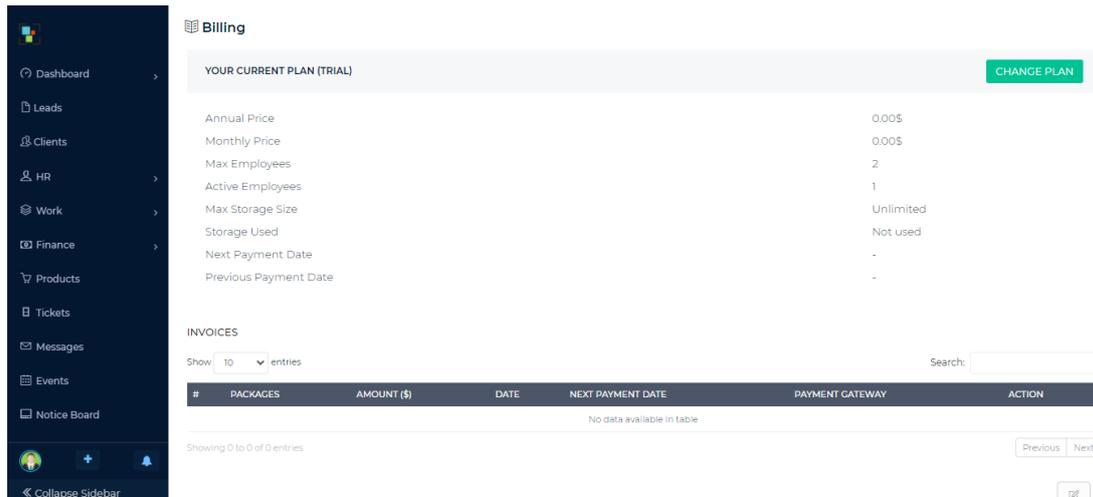
In the 'Reports' panel, the user can find various sub-panels

- i. Task report
- ii. Time log report
- iii. Finance report
- iv. Income Vs expense report
- v. Leave report
- vi. Attendance report

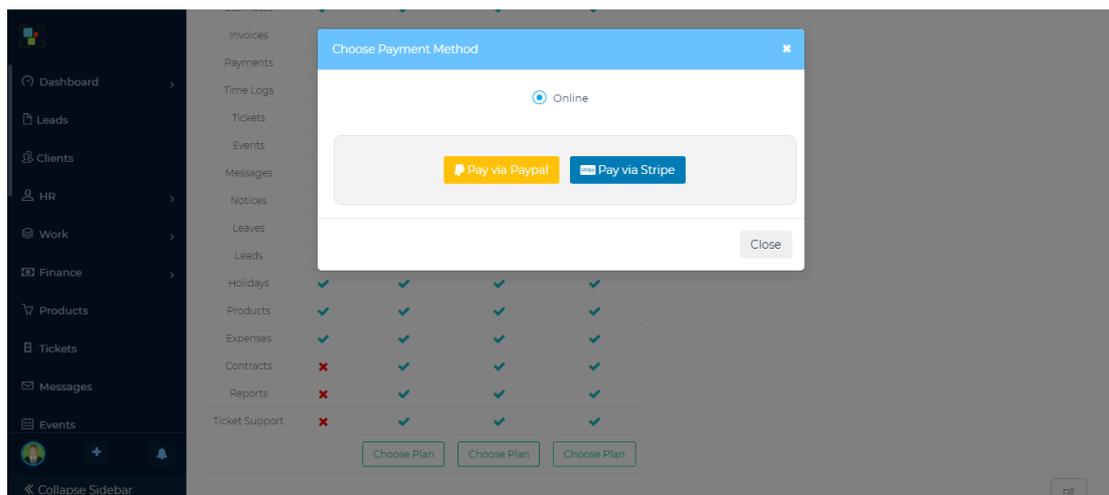
Task report, Time log report, Finance report, Income Vs expense report are represented graphically via pie and bar charts.

BILLING:

In the billing panel, the user can view and change the billing plan by clicking on 'Change plan'.



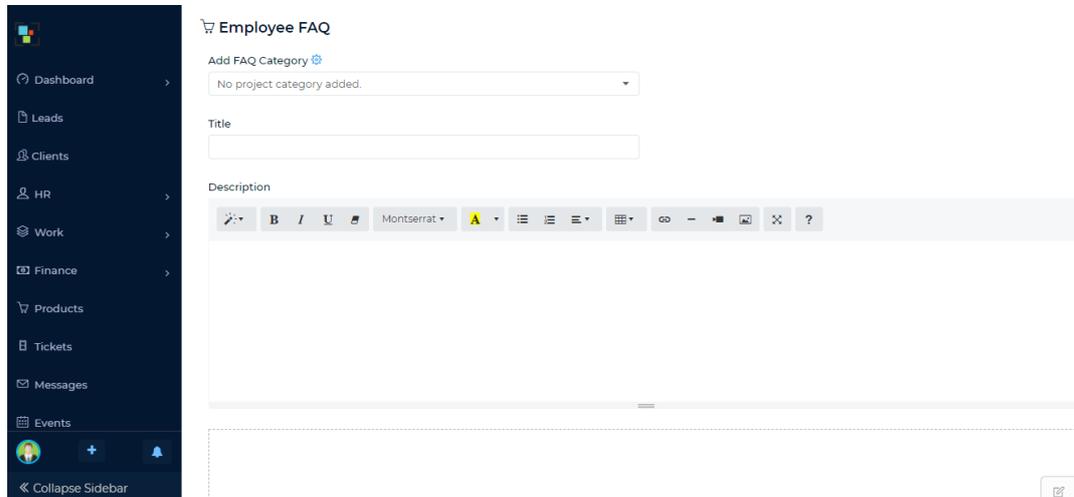
When selected the required 'Choose plan', the panel would be redirected to the payment page, where the user can choose the payment plan and proceed.



FAQ:

Under the sub-panel,

The user can view the Frequently asked Questions created by the admin by clicking on the 'FAQ panel' present below Billing panel.



The screenshot shows a web application interface for managing Employee FAQs. On the left is a dark sidebar with navigation links: Dashboard, Leads, Clients, HR, Work, Finance, Products, Tickets, Messages, and Events. The main content area is titled 'Employee FAQ' and contains the following form elements:

- Add FAQ Category:** A dropdown menu currently displaying 'No project category added.'
- Title:** A text input field.
- Description:** A rich text editor with a toolbar containing icons for bold, italic, underline, text color, font color, bulleted list, numbered list, link, unlink, and help. The font family is set to 'Montserrat'.

User can add FAQs by clicking on the 'Add FAQ' tab and by filling out the required details.

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