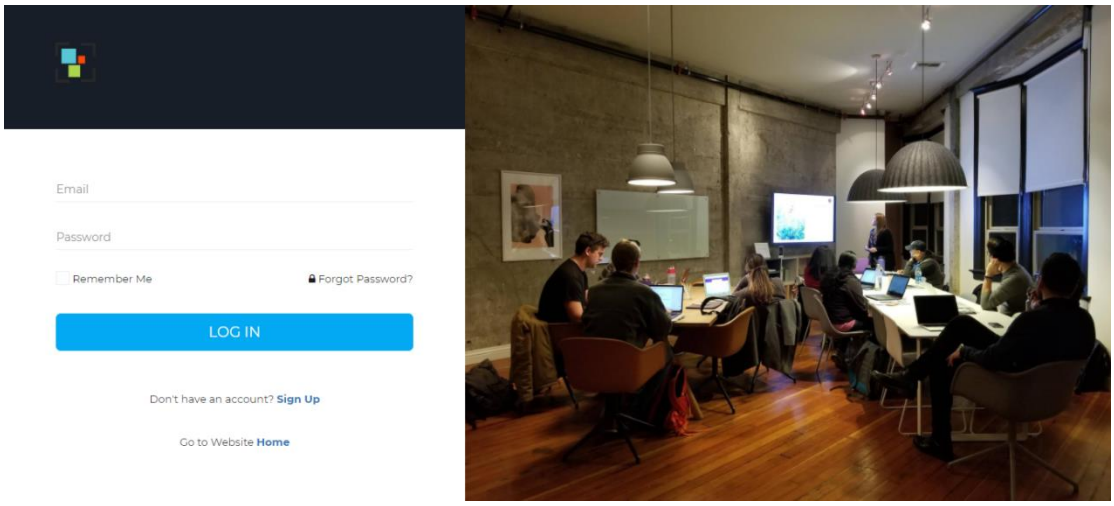
Collaborate,manage projects,create leads and tasks, reach new productivity peaks - accomplish it all with Keva.

KEVA SOFTWARE USER GUIDE:

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

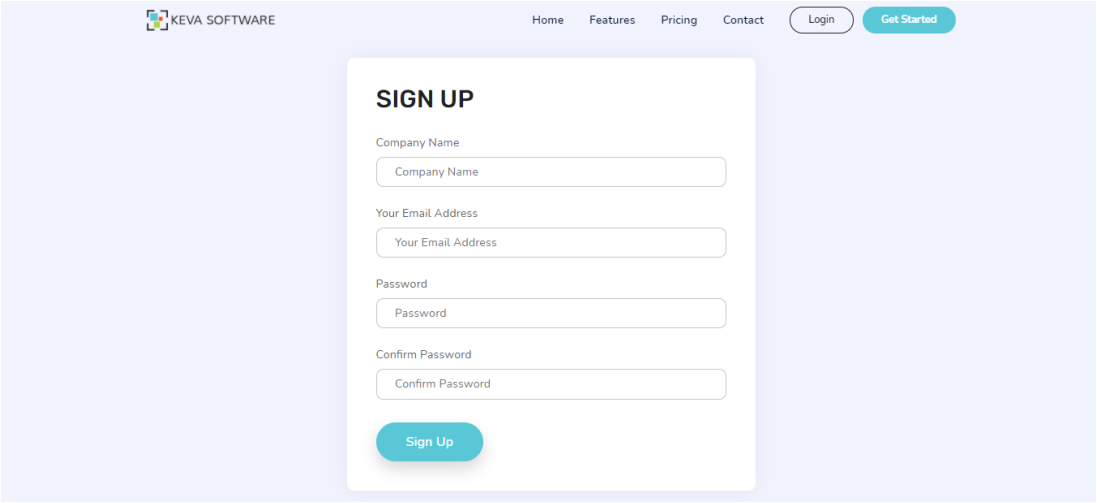
LOGIN:

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



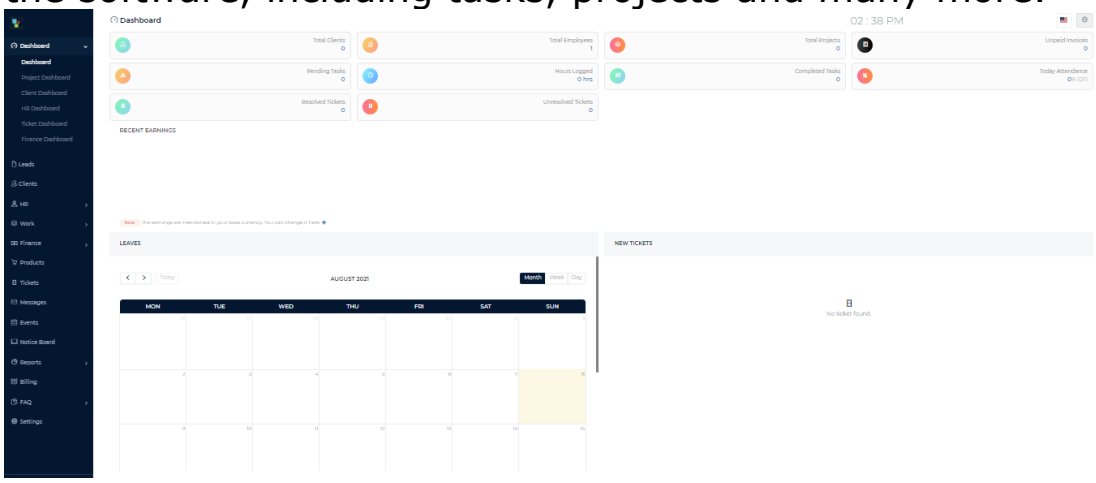
SIGNUP:

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



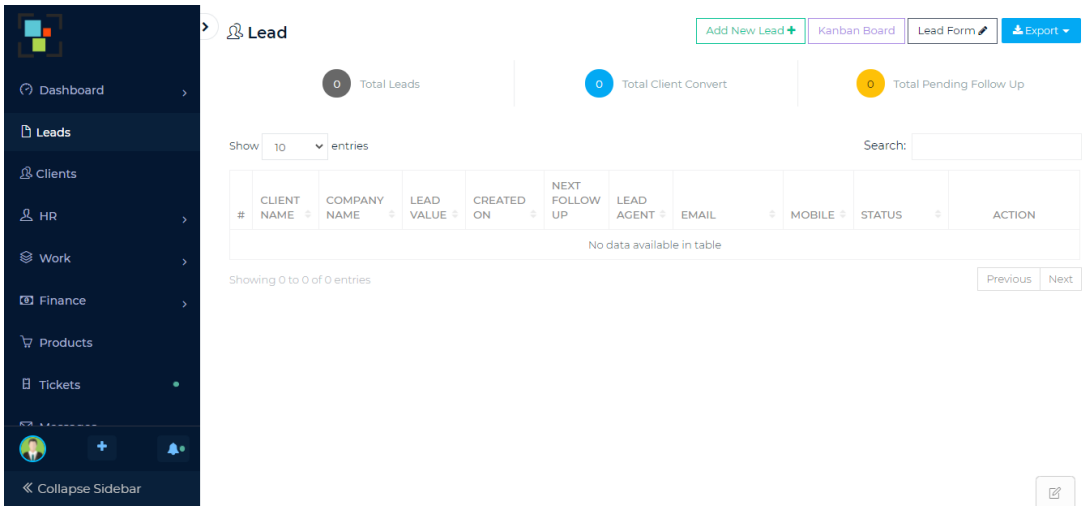
DASHBOARD:

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

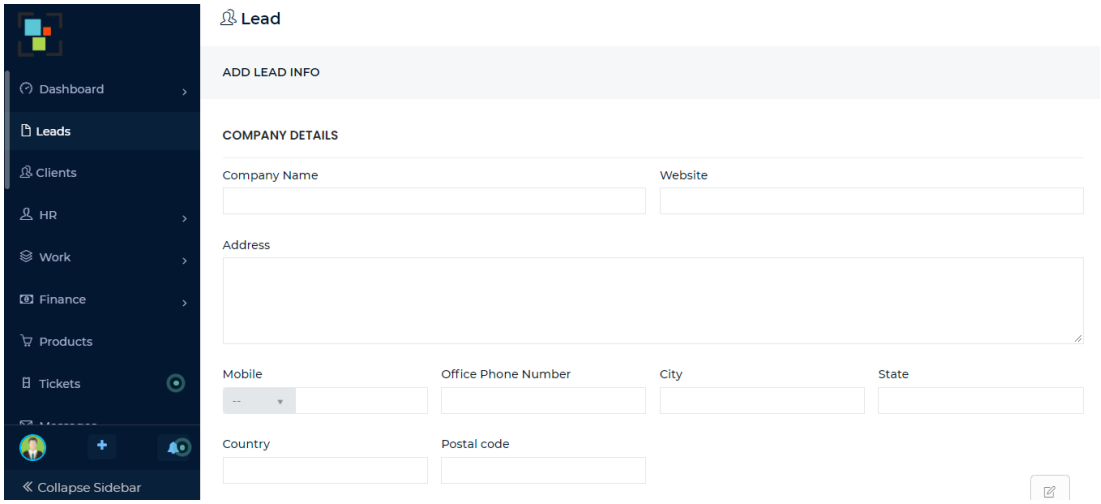


LEADS:

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

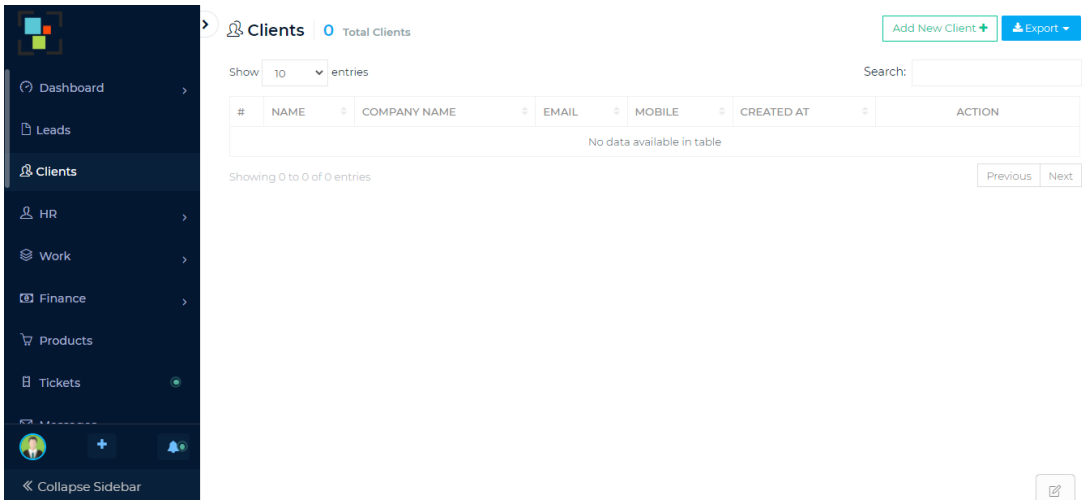


Add new lead-User can create a new lead by clicking on the 'Add new lead', present on the upper-right corner of the panel.
User can also export the data of leads in forms of CSV and excel files.Filter,search,edit options are also available to access and view the leads data.

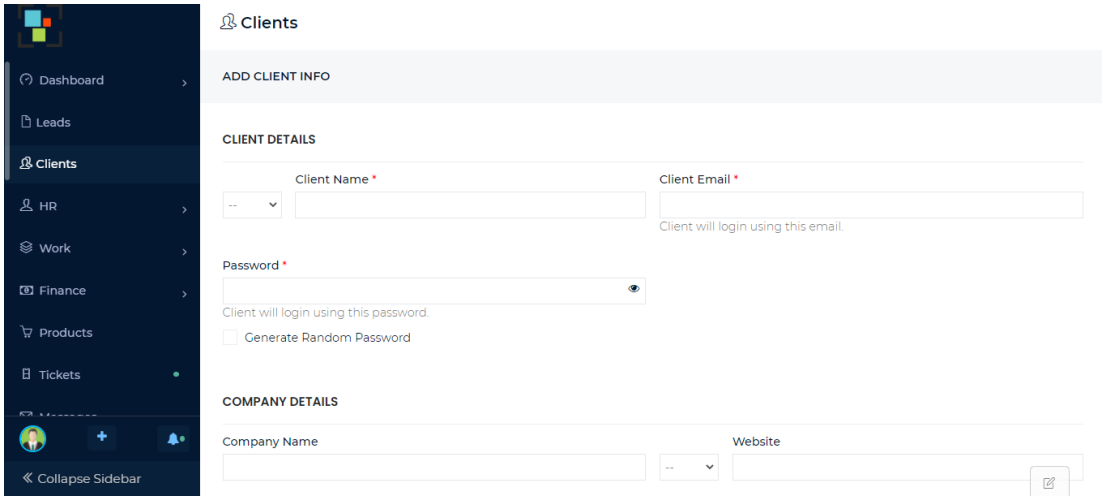


CLIENTS:

The 'Client panel' displays the Total Clients present.



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.

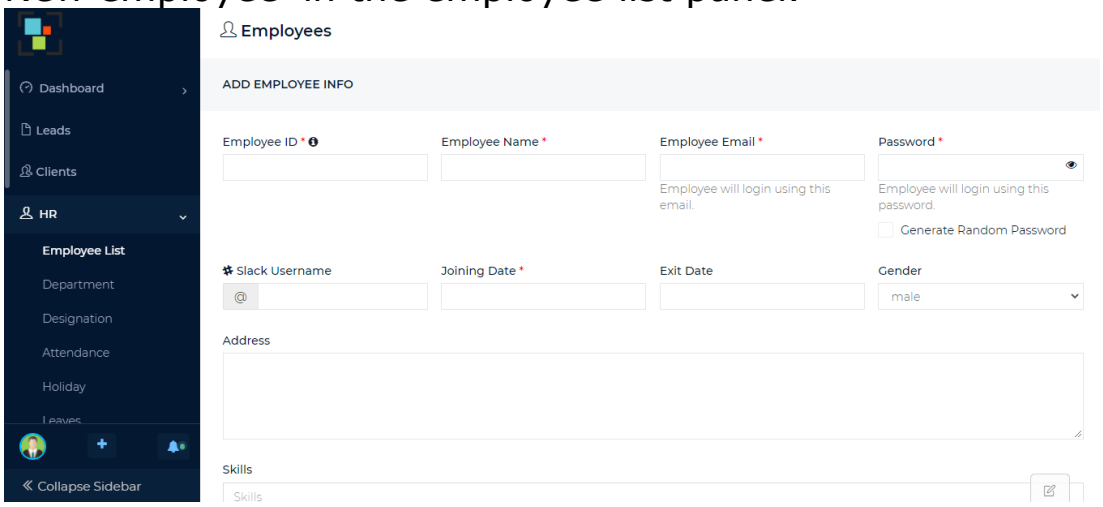


HR:

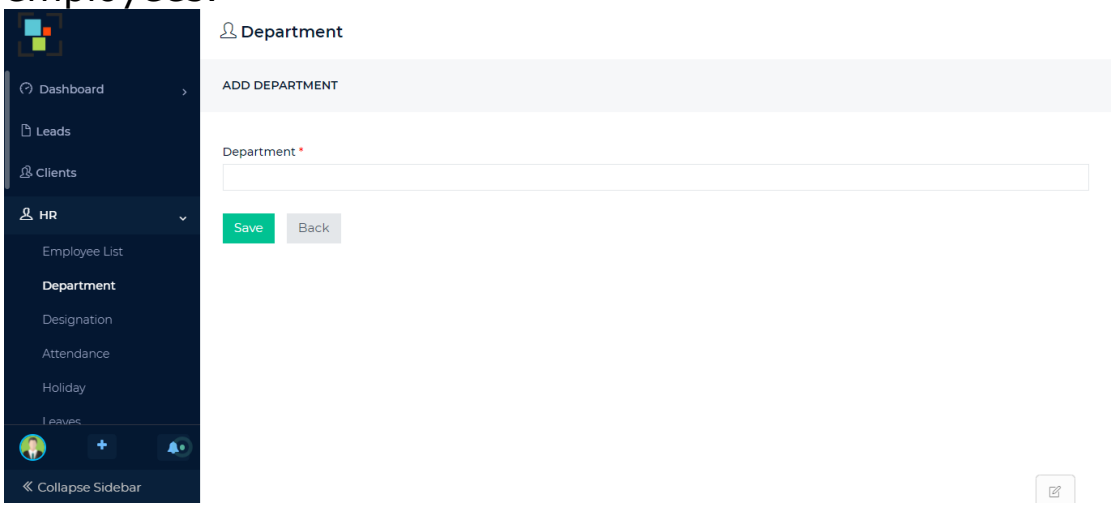
The 'HR panel' ,present below the Clients panel has the following sub-panels where various tasks can be added and performed.

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

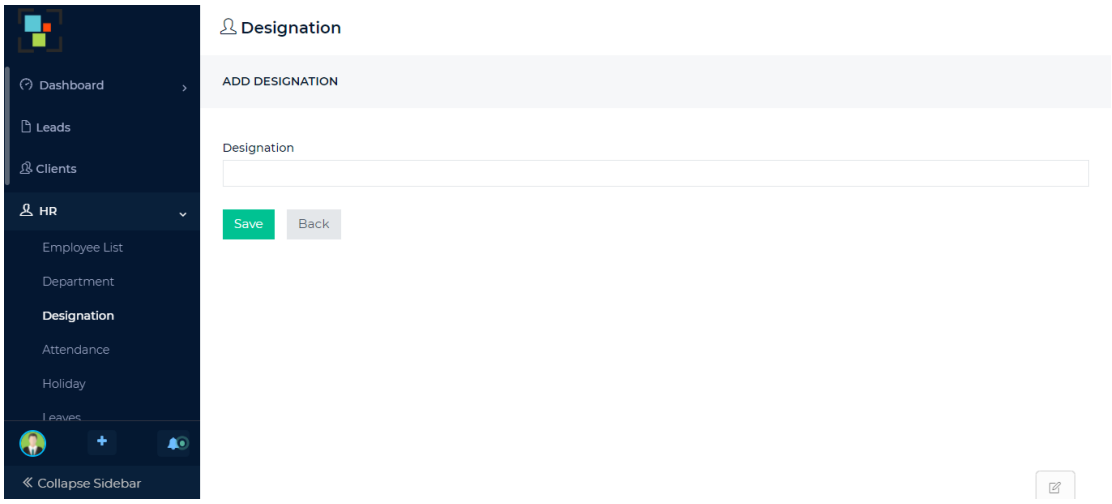
Add a new employee-Fill out the details after clicking 'Add New employee' in the employee list panel.



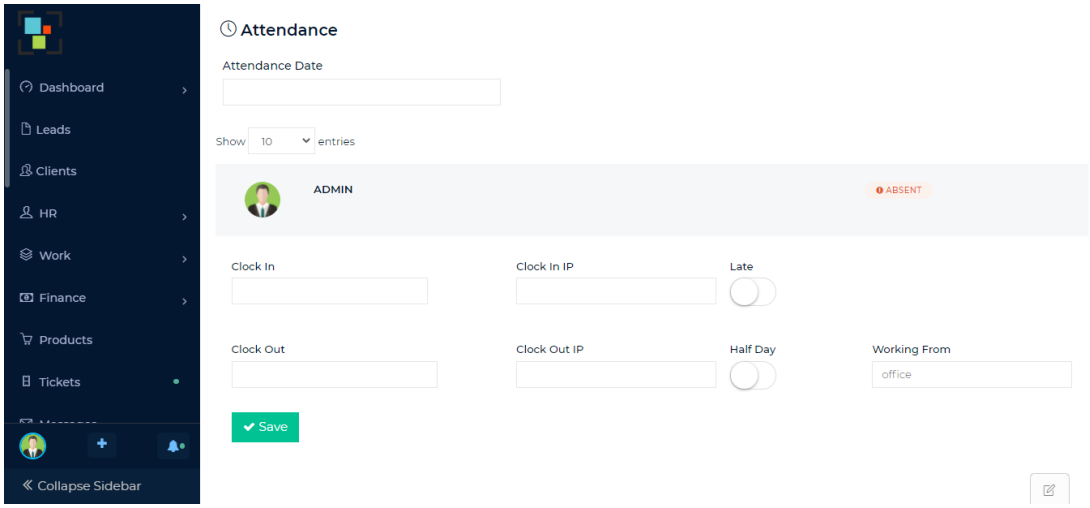
Add department-Under the departmant sub-panel,user(admin)can create departments for the employees.



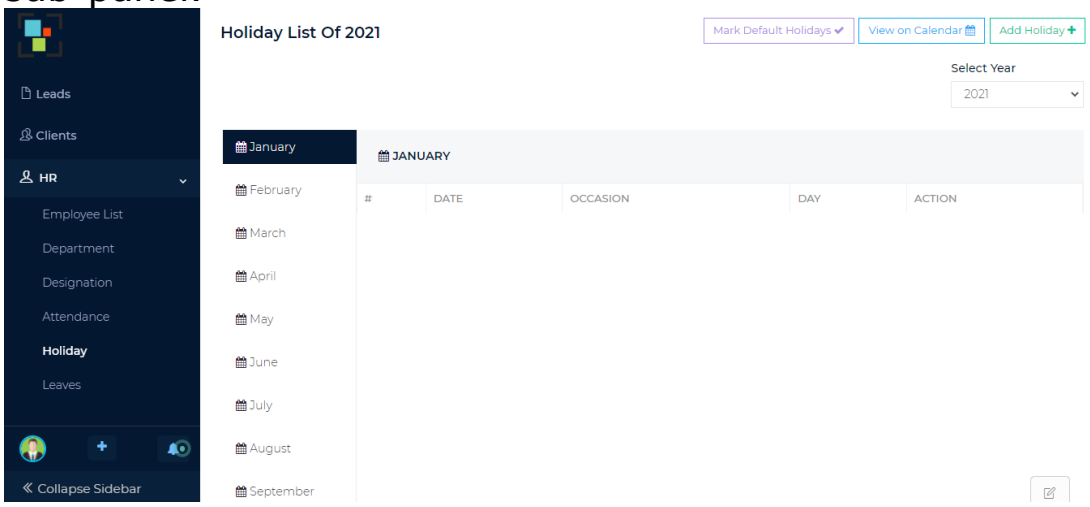
Add Designation-Under the Designation sub-panel,user(admin)can create Designations for the employees.



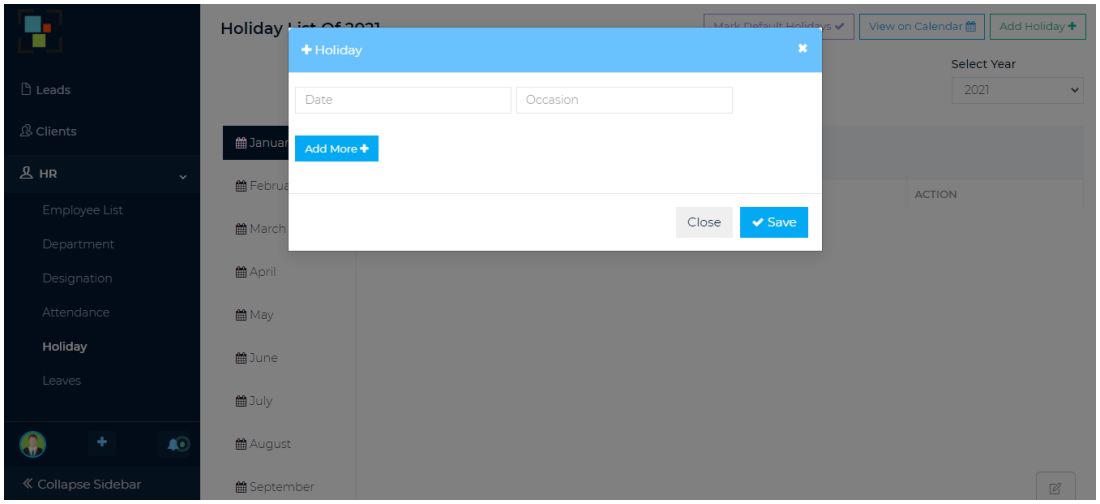
User can view and mark attendance in the attendance sub-panel.Fill out the following details to mark attendance.



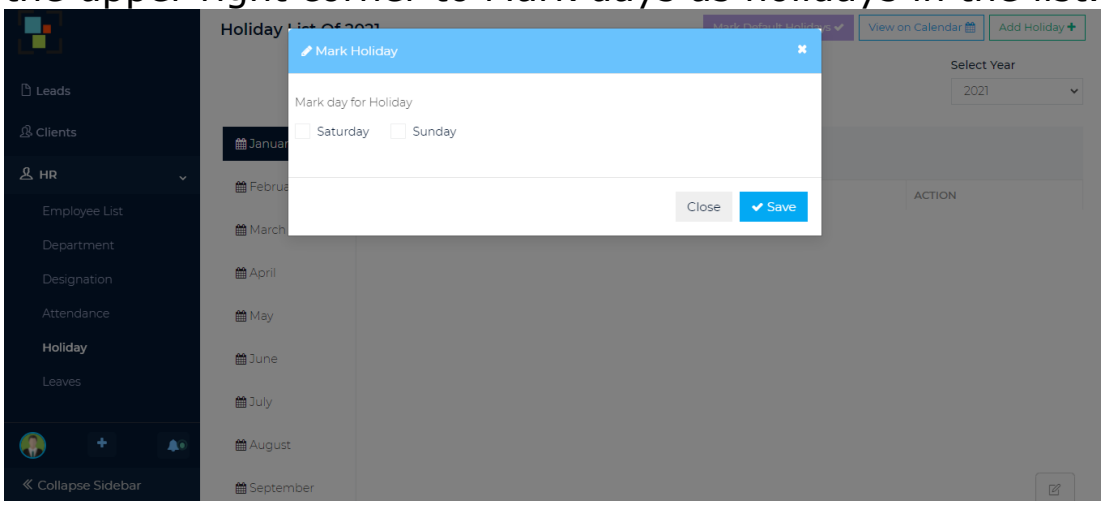
User can view the upcoming holidays in the holiday list sub-panel.



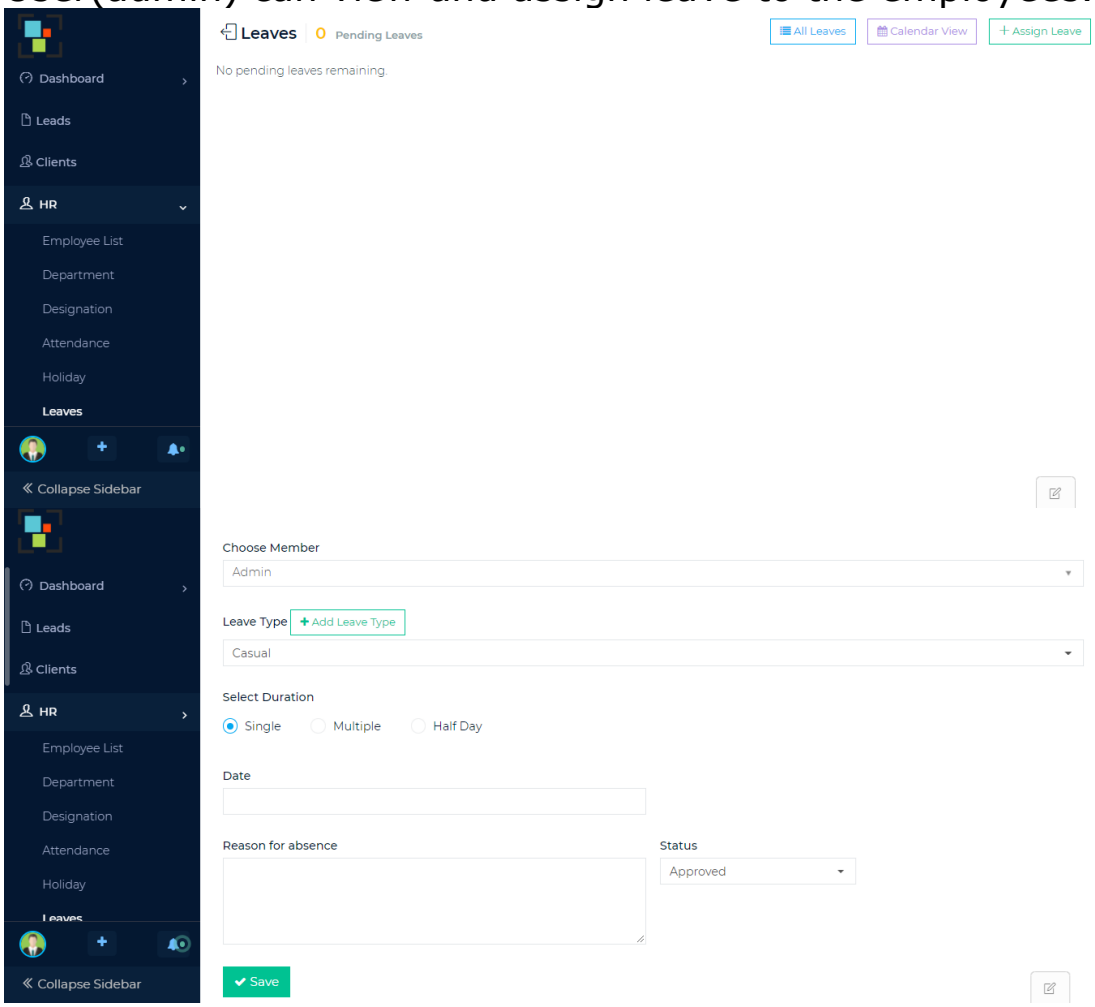
Add a holiday-Click on 'Add holiday' option present in the upper right corner to add holidays in the list.



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.

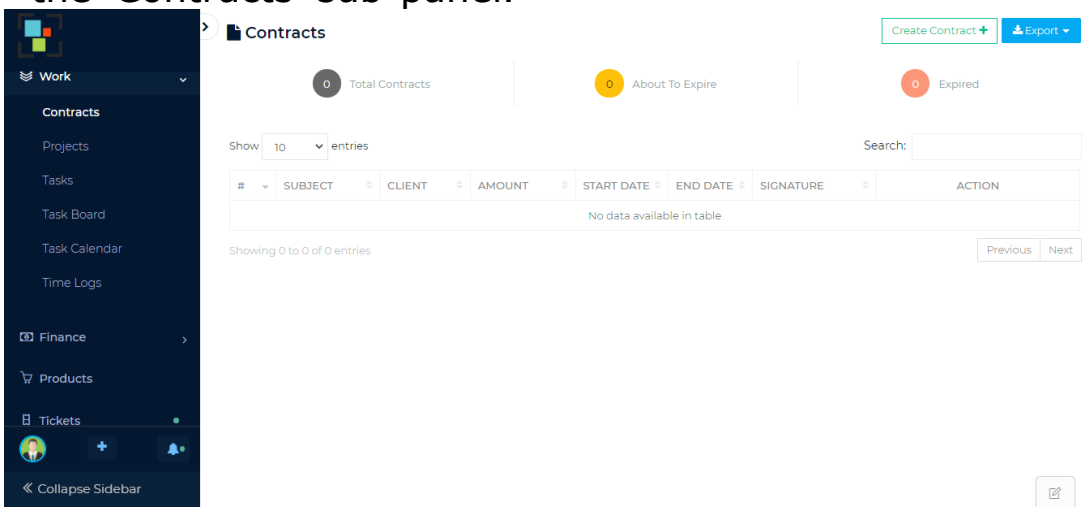


WORK:

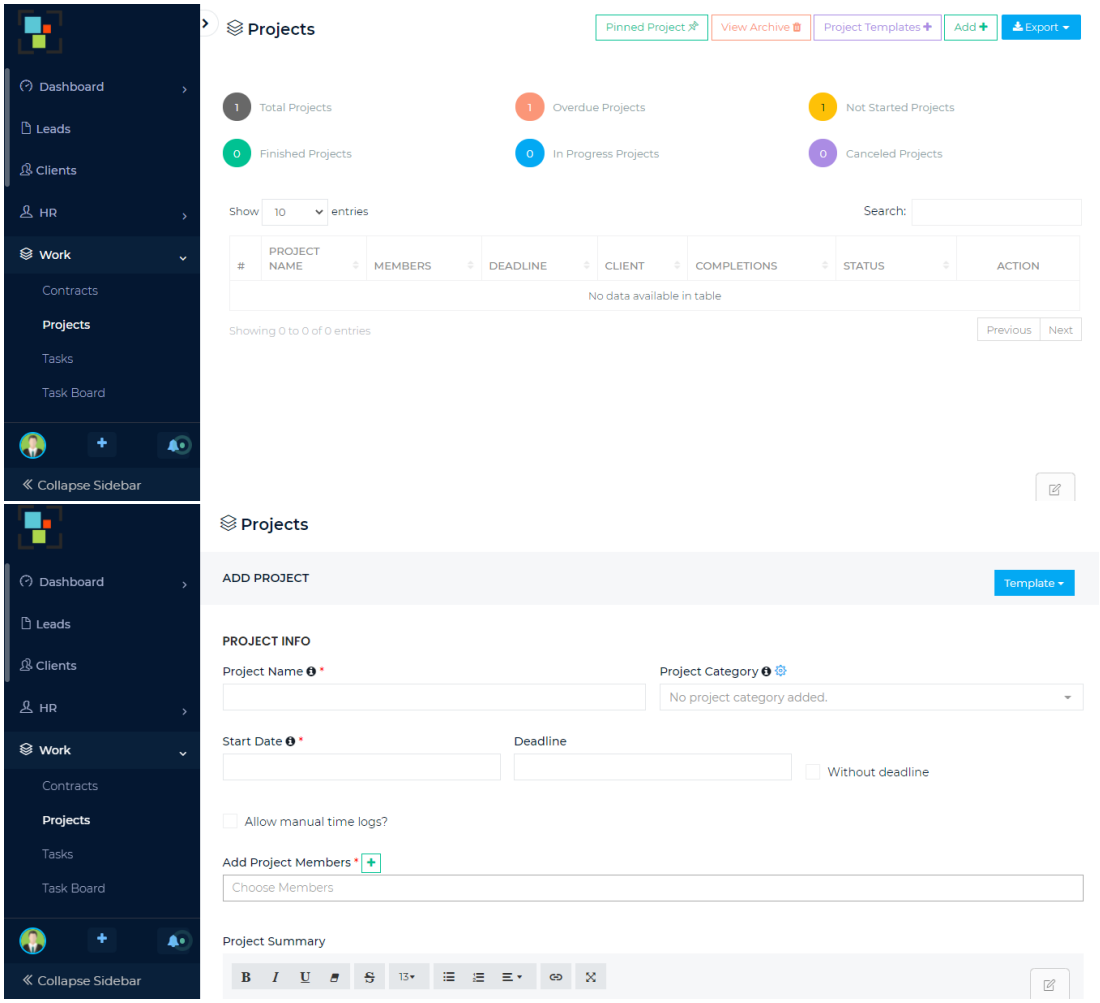
The ‘Work panel’ ,present below the HR panel has the following sub-panels where various tasks can be added and performed.

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

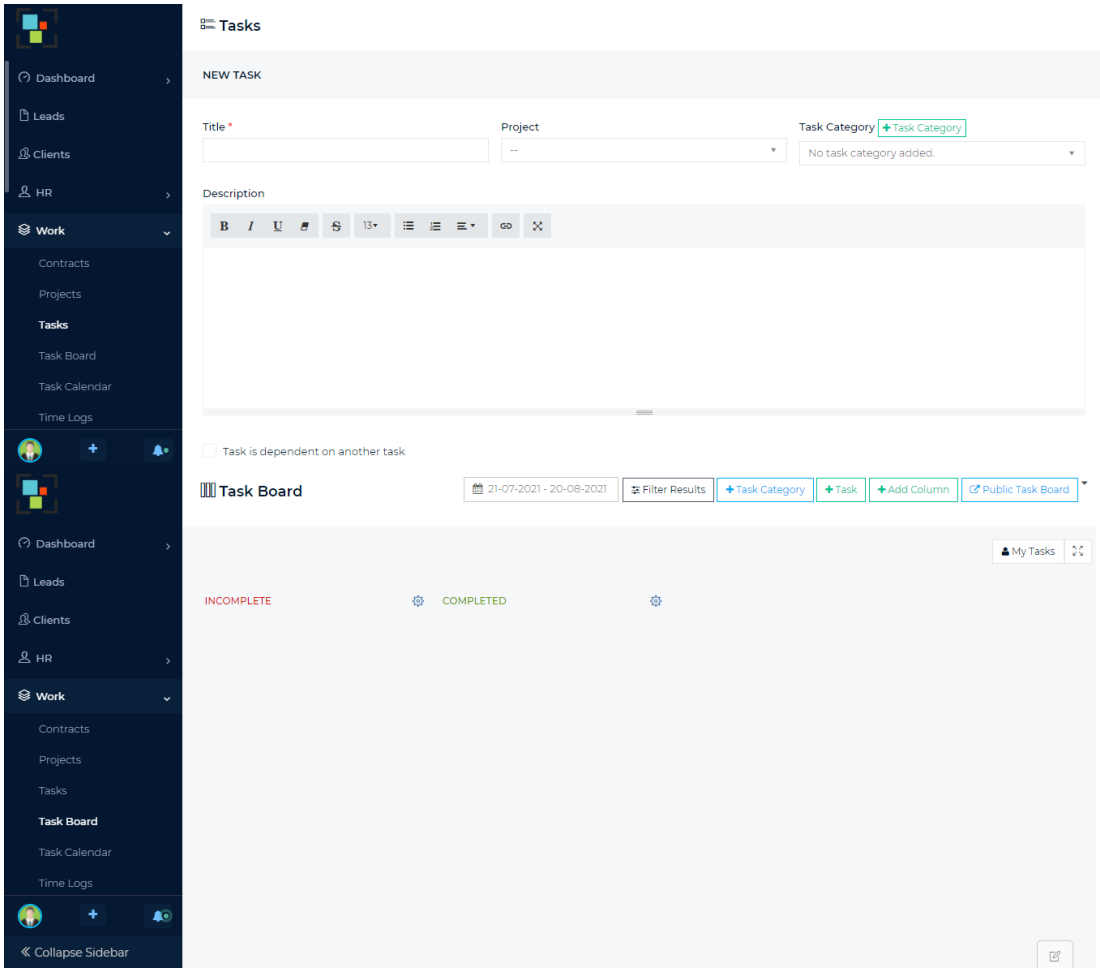
User can view,create contracts and export the data in the ‘Contracts’ sub-panel.



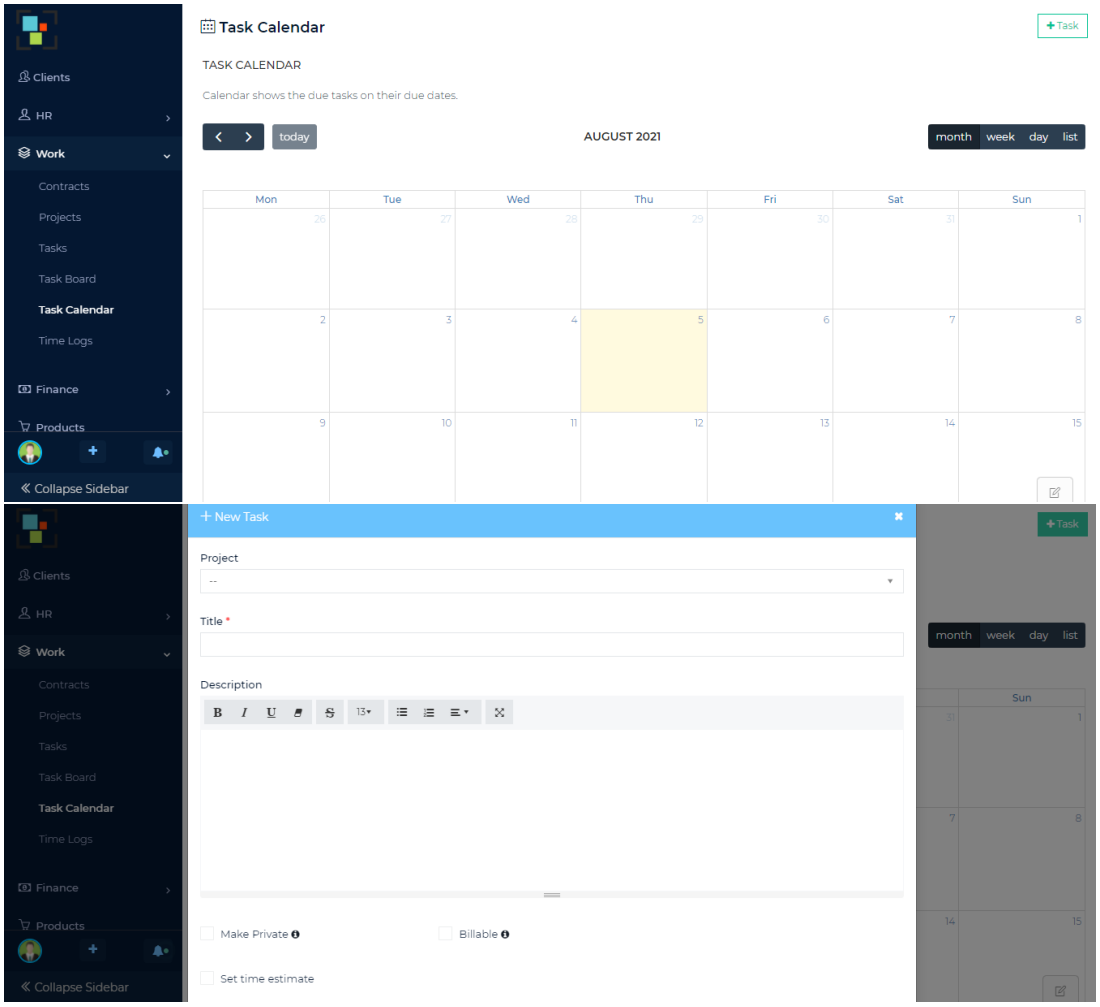
User can view,create projects and export the data in the ‘Projects’ sub-panel.



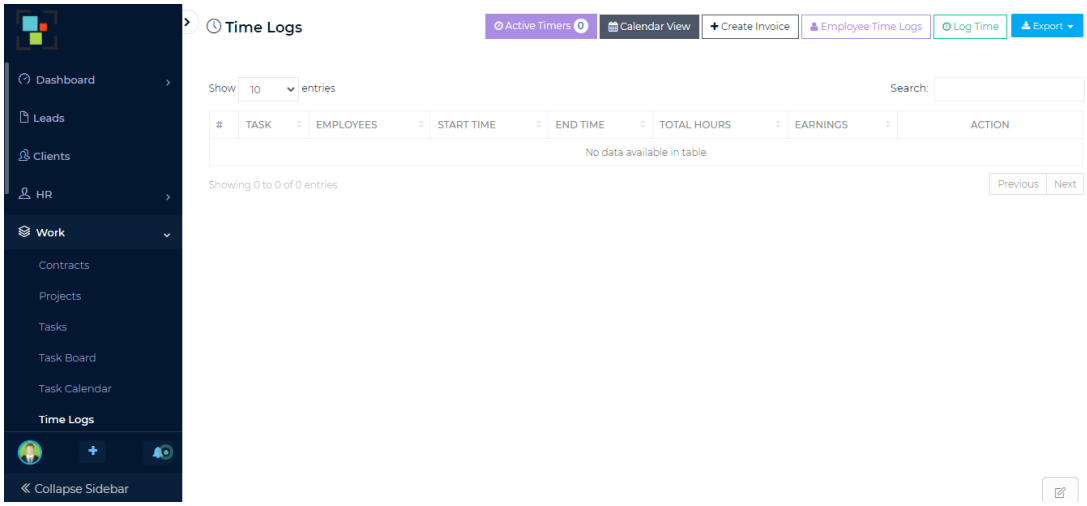
User can view,create tasks,Task labels and export the data in the 'Tasks' sub-panel.
The tasks can also be viewed in the task board sub-panel.



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



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

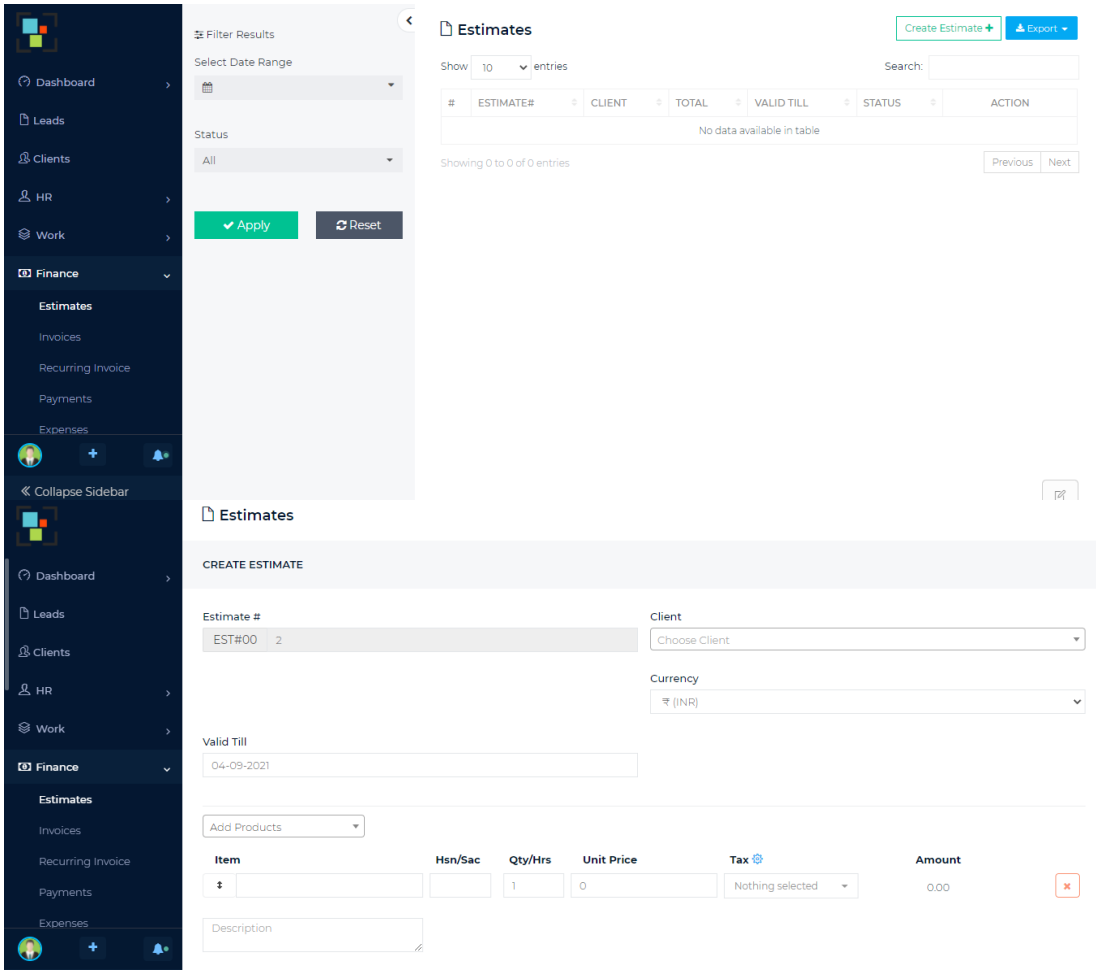


FINANCE:

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.



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

Dashboard
Leads
Clients
HR
Work
Finance
Estimates
Invoices
Recurring Invoice
Payments
Expenses
Collapse Sidebar

Invoices

ADD INVOICE

Invoice # INV#00 1

Project Choose Project

Client Name

Invoice Date

Due Date

Currency ₹ (INR)

Show Shipping Address

Add Products

Item	Hsn/Sac	Qty/Hrs	Unit Price	Tax	Amount
		1	0	Nothing selected	0.00

Description

+ Add Item

Dashboard
Leads
Clients
HR
Work
Finance
Estimates
Invoices
Recurring Invoice
Payments
Expenses
Collapse Sidebar

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: Choose Project
Client Name:
Currency: ₹ (INR)
Invoice Date:
Due Date:
Show Shipping Address
Billing Frequency: Daily
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: 05-08-2021 08:09 PM
Currency: Select Currency
Amount:
Payment Gateway:
Paypal, Authorize.net, Stripe, Bank Transfer, Cash or others.

Dashboard
Leads
Clients
HR
Work
Finance
Estimates
Invoices
Recurring Invoice
Payments
Expenses
Collapse Sidebar

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

Dashboard
Leads
Clients
HR
Work
Finance
Estimates
Invoices
Recurring Invoice
Payments
Expenses
Collapse Sidebar

Expenses

ADD EXPENSE

Choose Member
Choose Member

Project
Select Project

Expense Category +
No project category added.

Currency
Rupee - (₹)

Item Name *

Price *

Dashboard
Leads
Clients
HR
Work
Finance
Estimates
Invoices
Recurring Invoice
Payments
Expenses
Collapse Sidebar

Filter Results
Select Date Range
Employee
All
Status
All
Apply
Reset

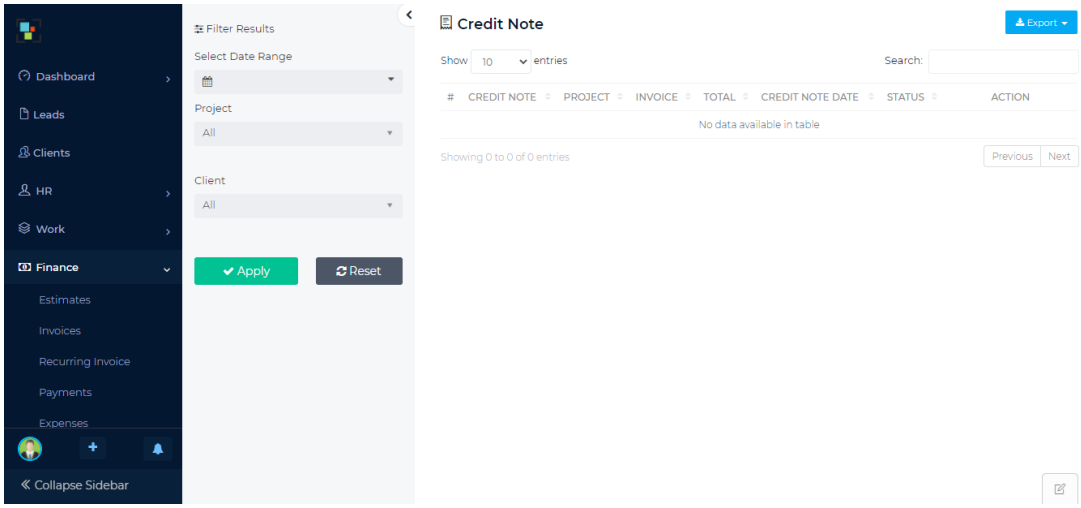
Expenses Recurring

Add Recurring Expense | Export

Show 10 entries
Search:

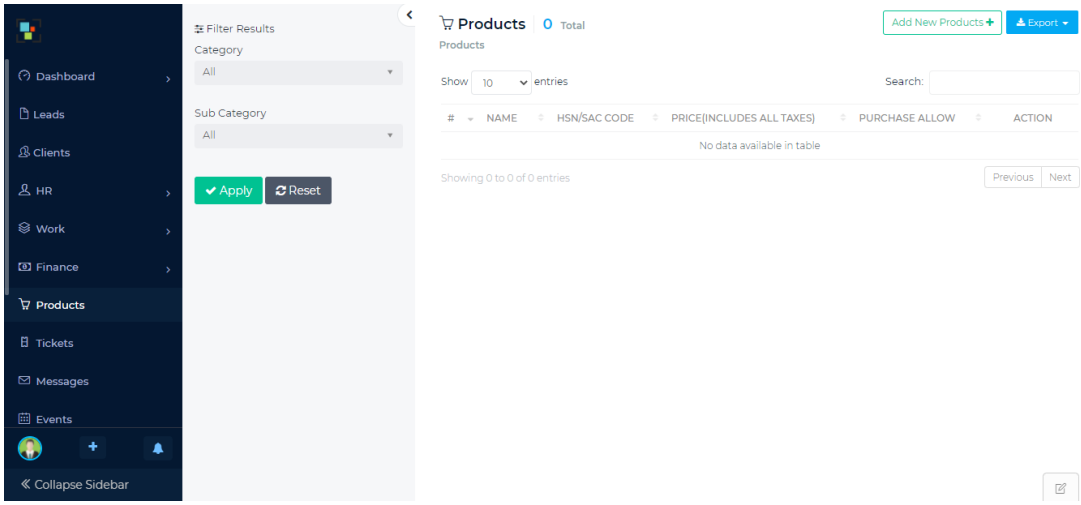
#	ITEM NAME	PRICE	EMPLOYEES	CREATED ON	STATUS	ACTION
No data available in table						

Showing 0 to 0 of 0 entries
Previous Next

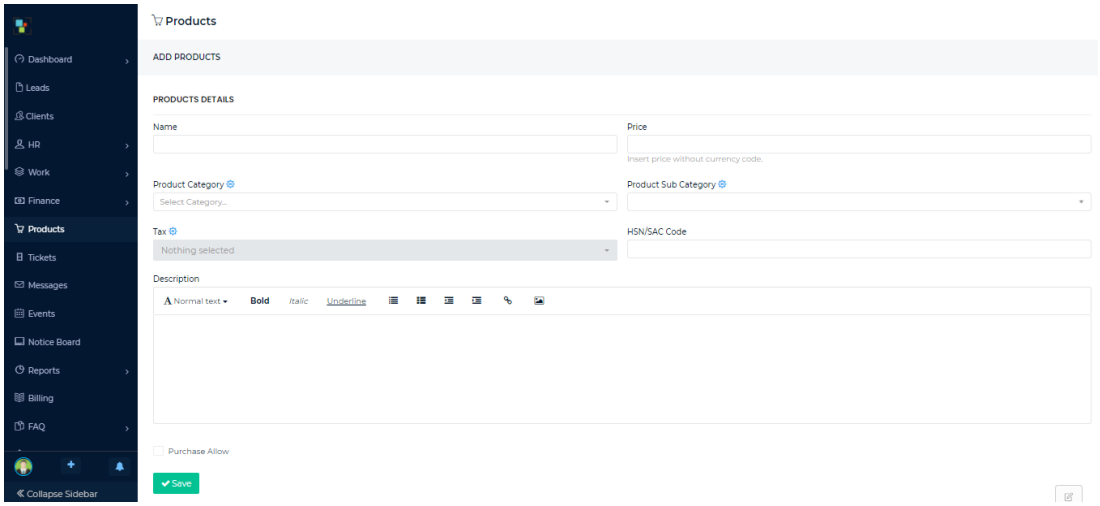


PRODUCTS:

The products panel displays the Total Products present.

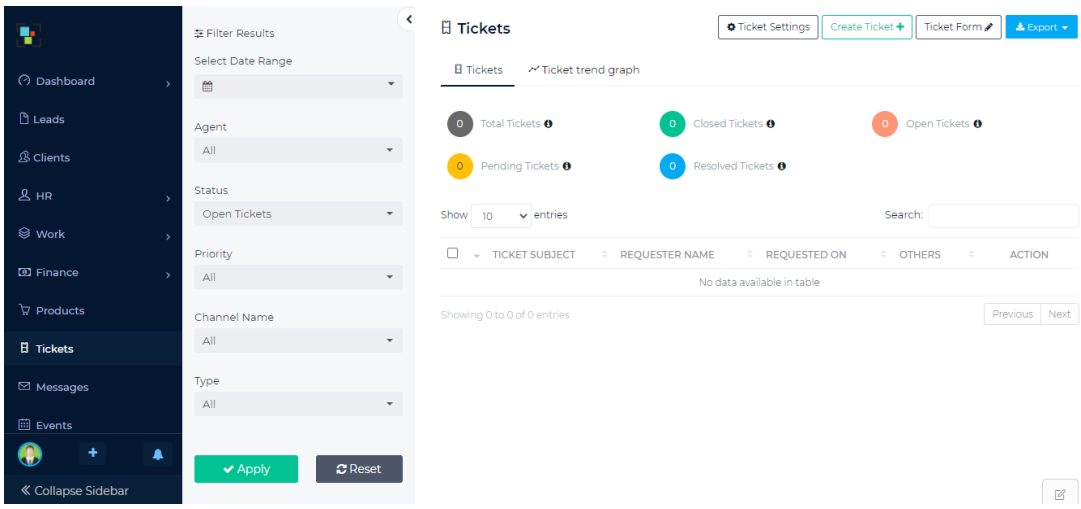


Add New product-User can create a new product by clicking on the 'Add New product', present on the upper-right corner of the panel.
User can also export the data of leads in forms of CSV and excel files.Filter,search,edit options are also available to access and view the product data.

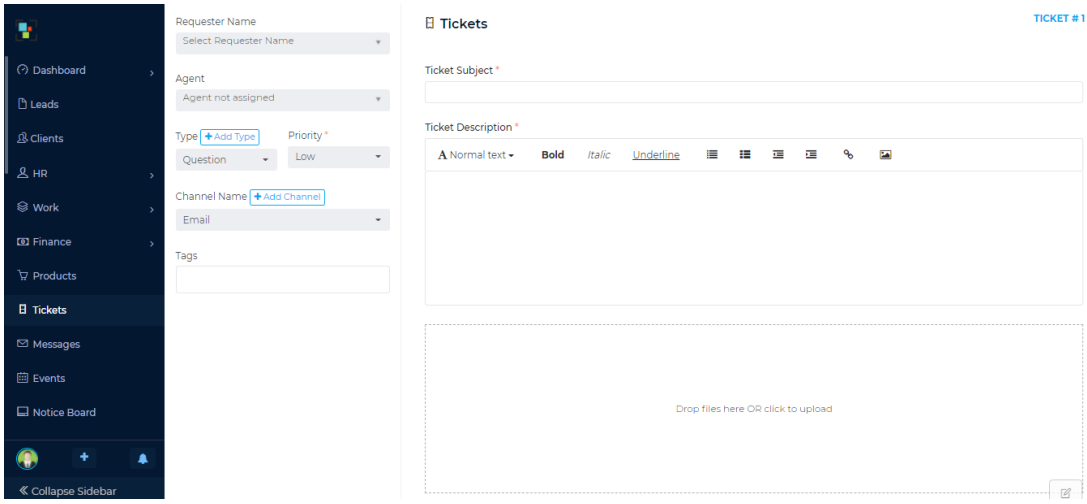


TICKETS:

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:

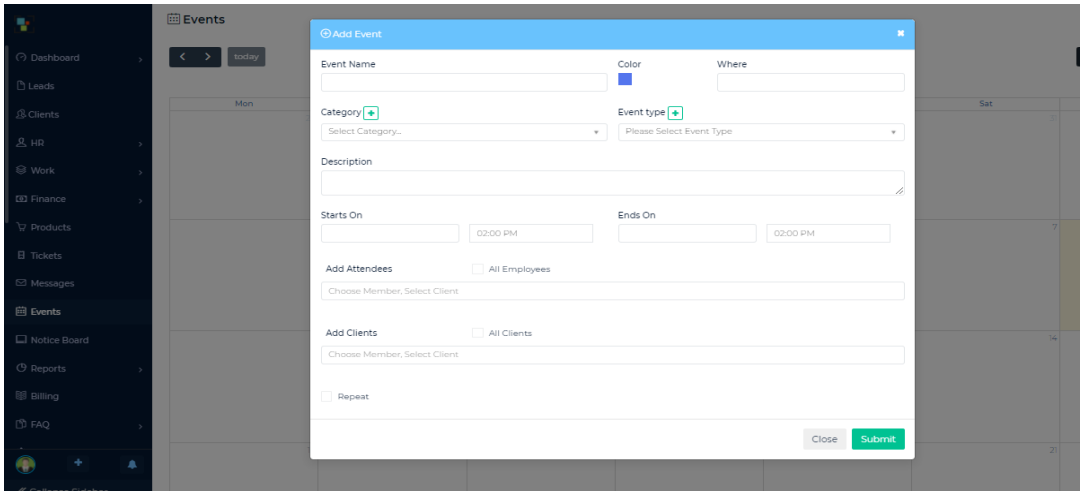


MESSAGES:

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)

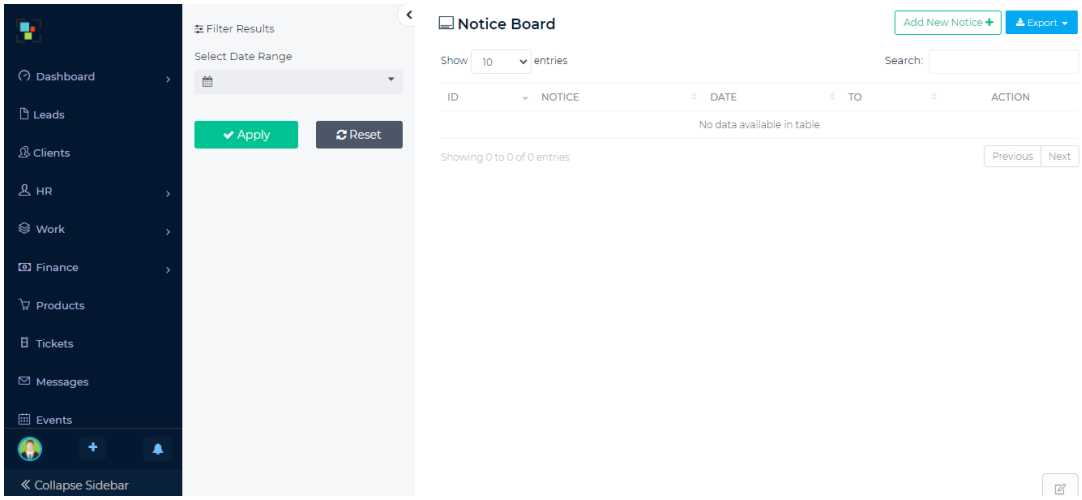
EVENTS:

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.

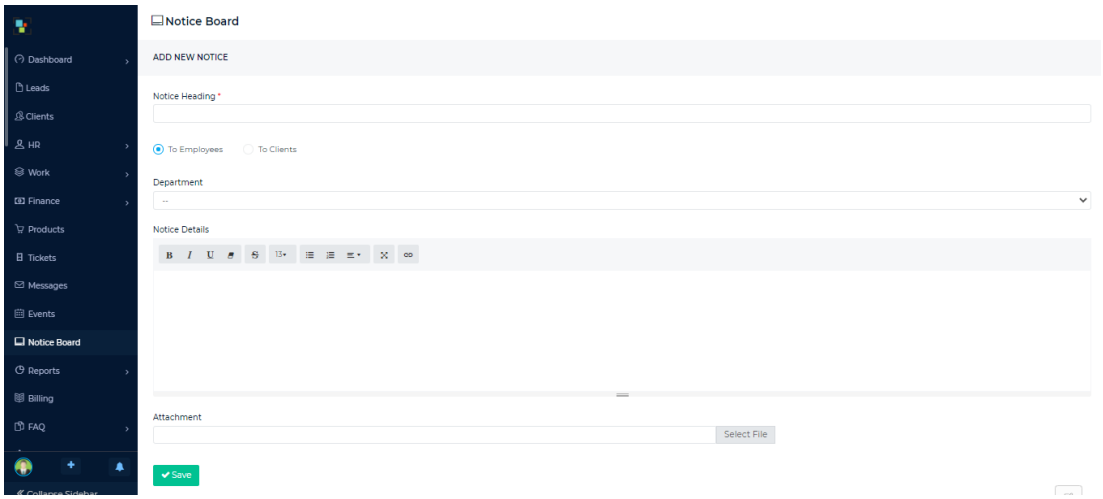


NOTICE BOARD:

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.



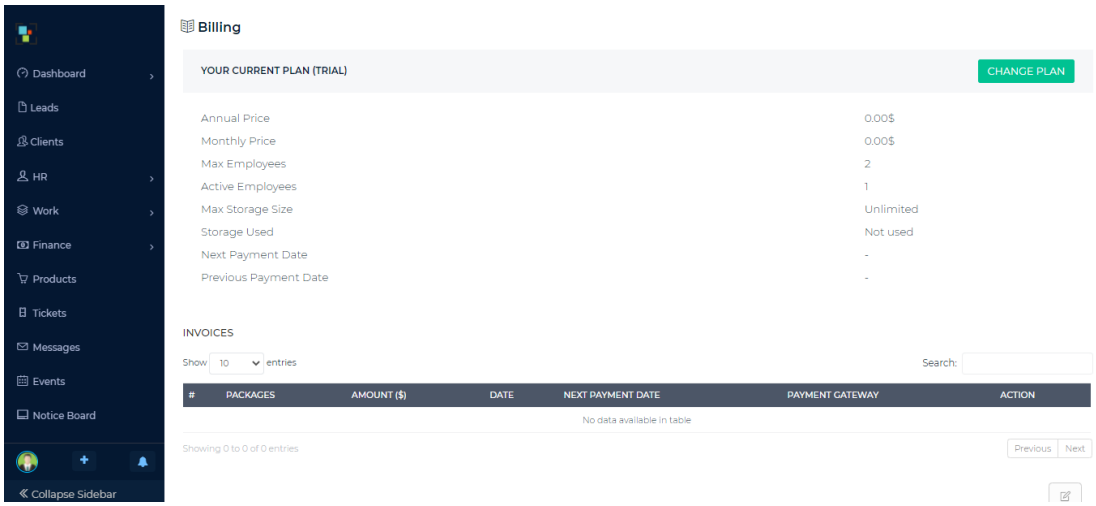
REPORTS:
In the 'Reports' panel, the user can find various sub-panels

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

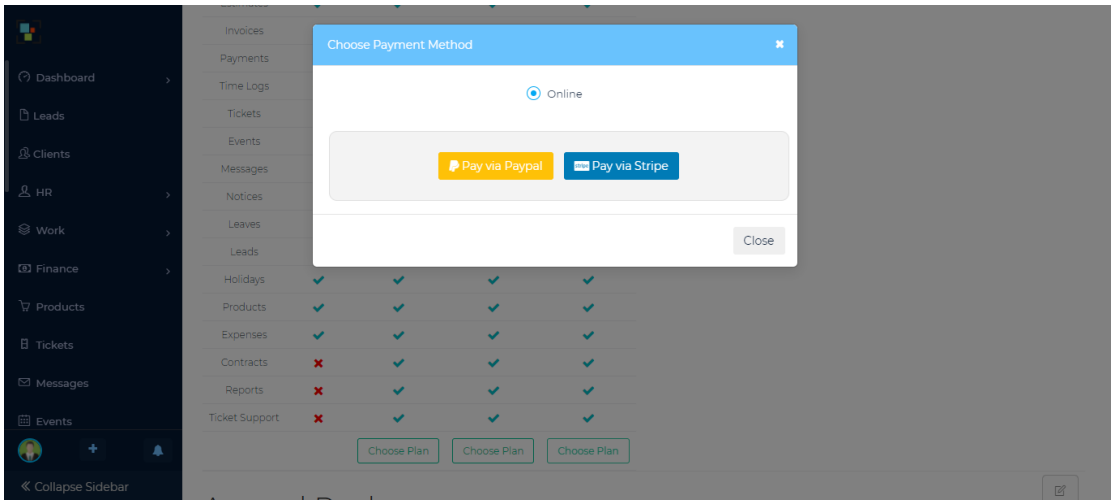
Task report,Time log report,Finance report,Income Vs expense report are represented graphically via pie and bar charts.

BILLING:

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



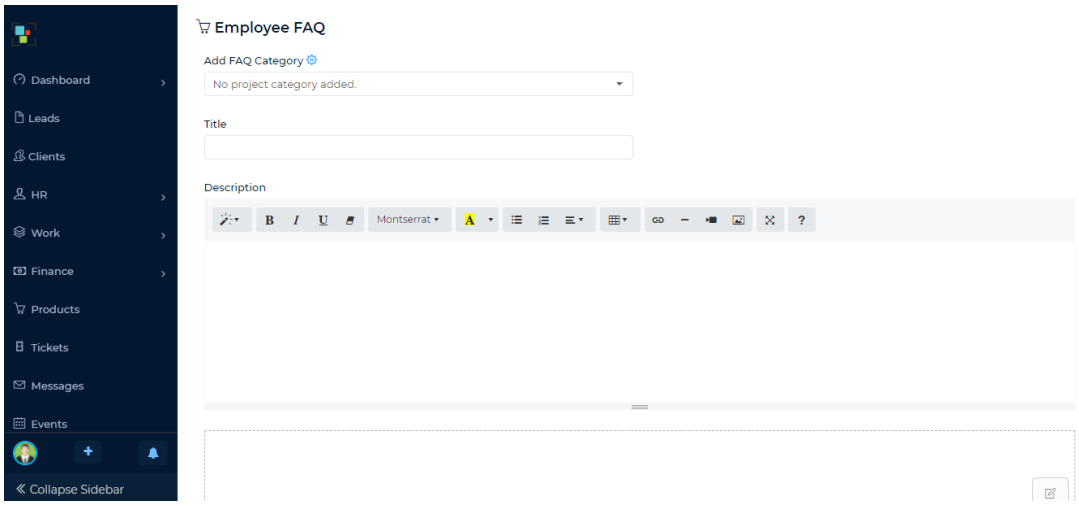
When selected the required 'Choose plan',the panel would be redirected to the payment page,where the user can choose the payment plan and proceed.



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.



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

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