

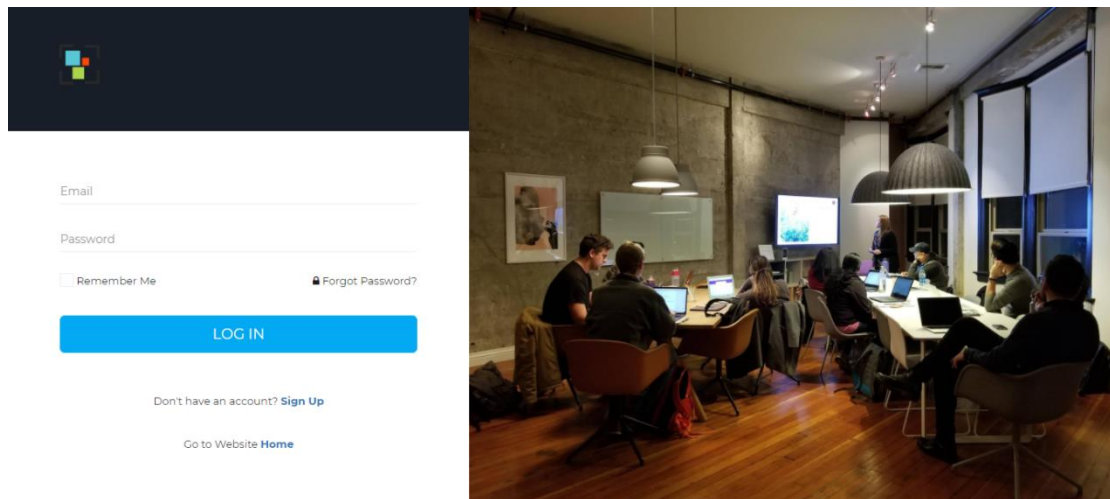
Collaborate,manage projects,create leads and tasks, reach new productivity peaks - accomplish it all with Keva.

KEVA SOFTWARE USER GUIDE:

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

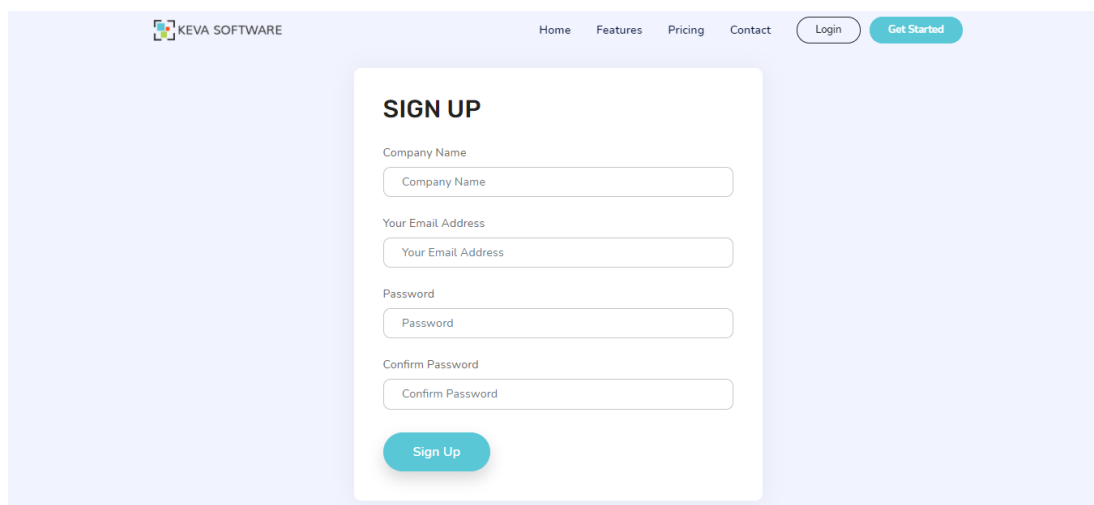
LOGIN:

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.



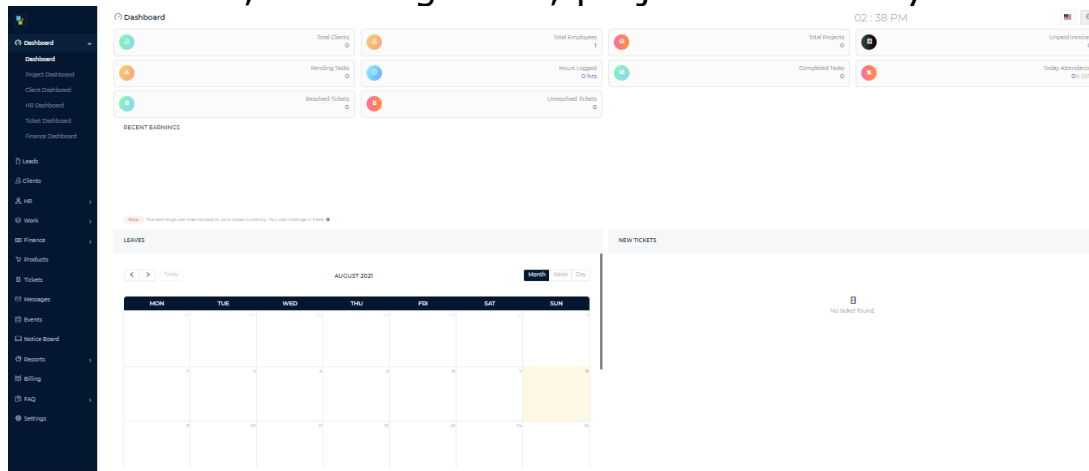
SIGNUP:

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



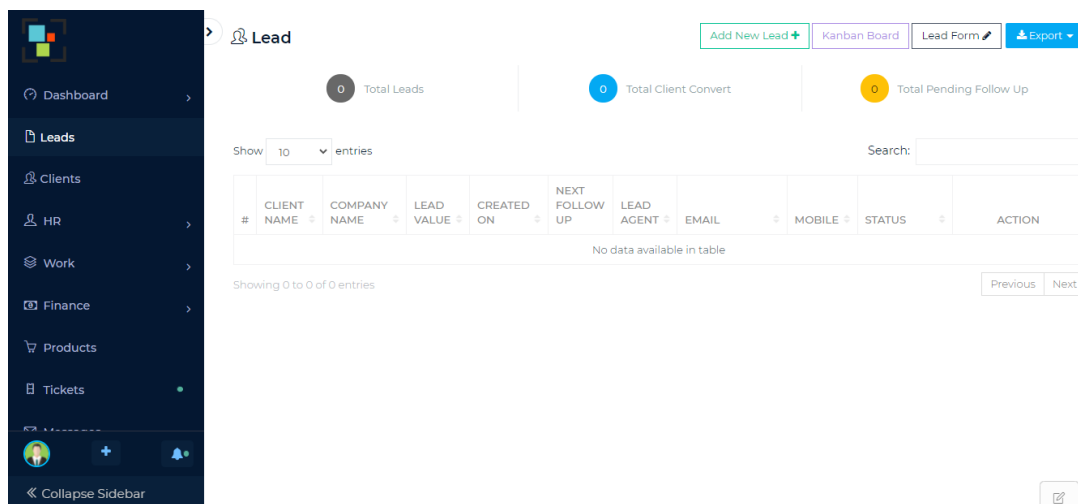
DASHBOARD:

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



LEADS:

On-clicking upon the 'Leads' panel 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.

Lead

ADD LEAD INFO

COMPANY DETAILS

Company Name Website

Address

Mobile Office Phone Number City State

Country Postal code

CLIENTS:

The 'Client panel' displays the Total Clients present.

Clients 0 Total Clients

Show 10 entries Search:

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

Showing 0 to 0 of 0 entries

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 *

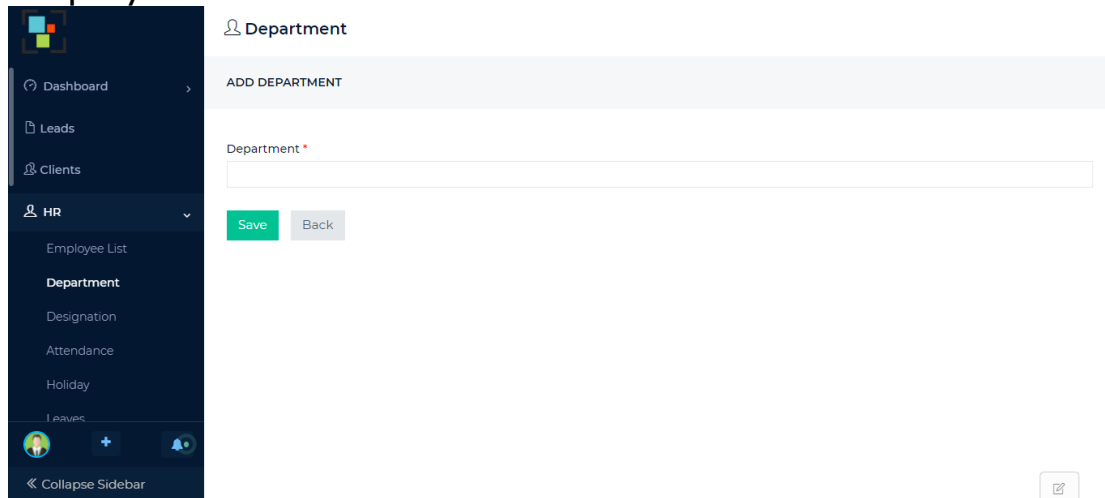
Exit Date

Gender

Address

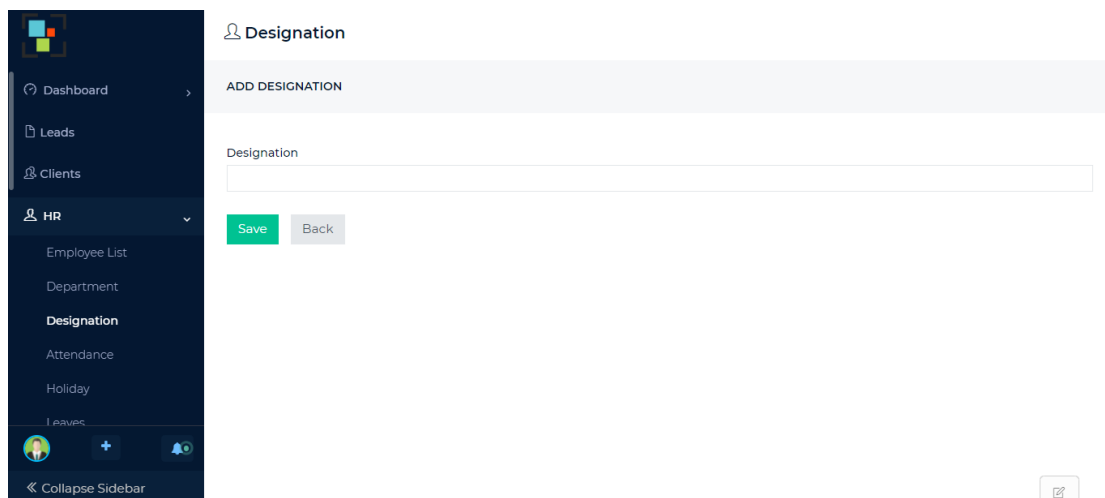
Skills

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



The screenshot shows a web application interface. On the left is a dark blue sidebar with a logo at the top and a list of menu items: Dashboard, Leads, Clients, HR (expanded), Employee List, Department (highlighted), Designation, Attendance, Holiday, and Leaves. At the bottom of the sidebar are icons for a user profile, a plus sign, and a notification bell, along with a 'Collapse Sidebar' button. The main content area has a header 'Department' with a person icon. Below it is a light gray bar with the text 'ADD DEPARTMENT'. A text input field labeled 'Department' with a red asterisk is present. Below the input field are two buttons: a green 'Save' button and a gray 'Back' button. A small 'Edit' icon is visible in the bottom right corner of the main content area.

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



The screenshot shows a web application interface. On the left is a dark blue sidebar with a logo at the top and a list of menu items: Dashboard, Leads, Clients, HR (expanded), Employee List, Department, Designation (highlighted), Attendance, Holiday, and Leaves. At the bottom of the sidebar are icons for a user profile, a plus sign, and a notification bell, along with a 'Collapse Sidebar' button. The main content area has a header 'Designation' with a person icon. Below it is a light gray bar with the text 'ADD DESIGNATION'. A text input field labeled 'Designation' is present. Below the input field are two buttons: a green 'Save' button and a gray 'Back' button. A small 'Edit' icon is visible in the bottom right corner of the main content area.

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

Attendance

Attendance Date

Show 10 entries

ADMIN ABSENT

Clock In Clock In IP ☐ Late

Clock Out Clock Out IP ☐ Half Day Working From

Save

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

Holiday List Of 2021

Mark Default Holidays View on Calendar Add Holiday

Select Year: 2021

January

#	DATE	OCCASION	DAY	ACTION

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

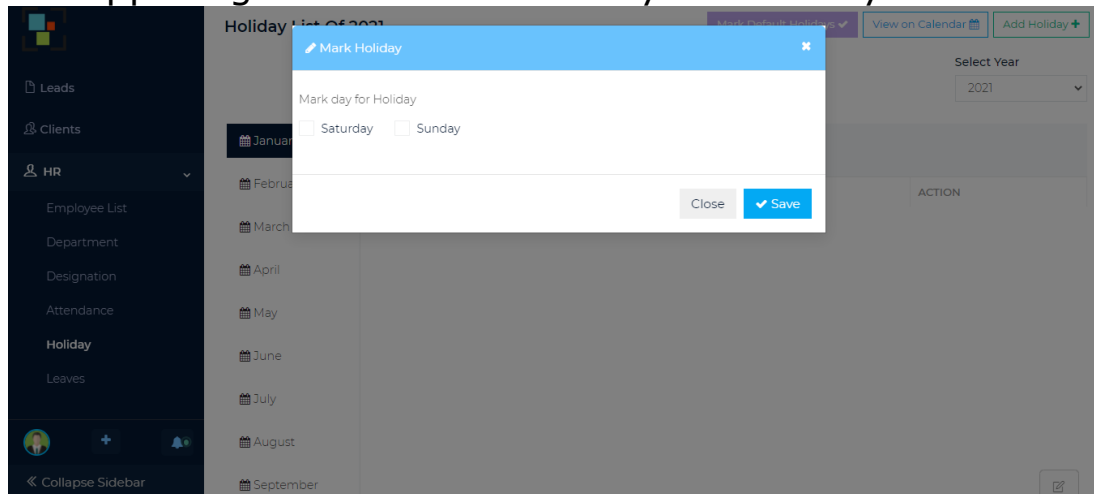
+ Holiday

Date Occasion

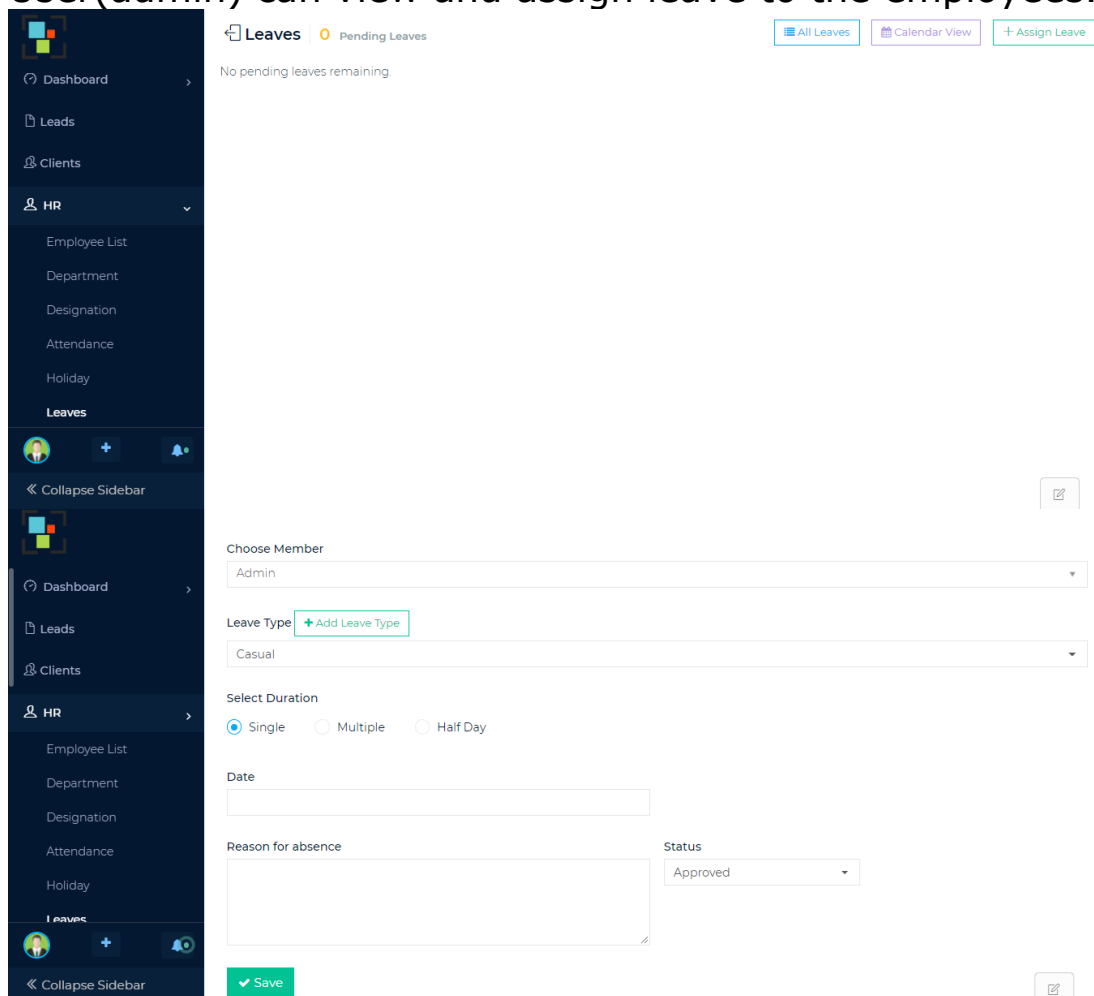
Add More

Close Save

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.

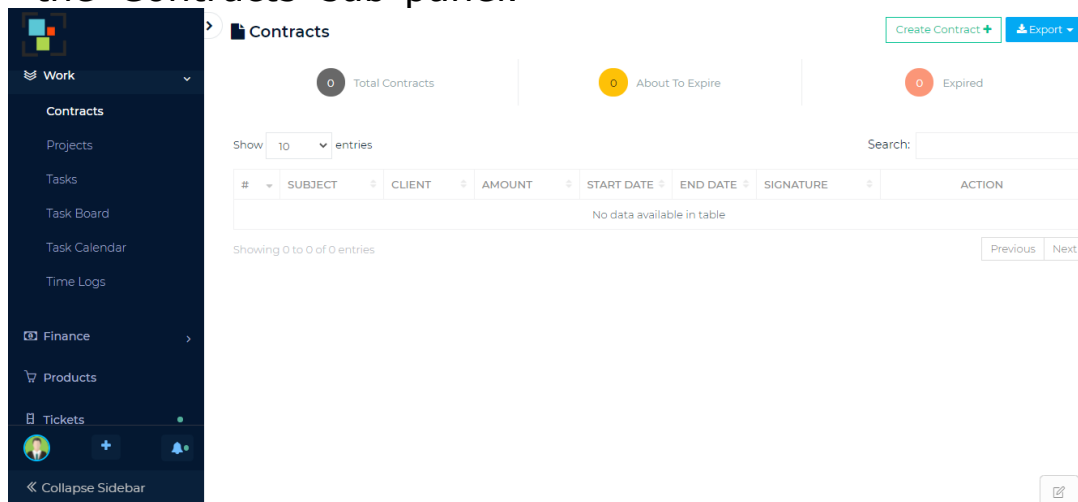


WORK:

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.

Dashboard

Leads

Clients

HR

Work

Contracts

Projects

Tasks

Task Board

+

Collapse Sidebar

Projects

Pinned Project

View Archive

Project Templates

Add

Export

1 Total Projects

1 Overdue Projects

1 Not Started Projects

0 Finished Projects

0 In Progress Projects

0 Canceled Projects

Show 10 entries

Search:

#	PROJECT NAME	MEMBERS	DEADLINE	CLIENT	COMPLETIONS	STATUS	ACTION
No data available in table							

Showing 0 to 0 of 0 entries

Previous

Next

Projects

ADD PROJECT

Template

PROJECT INFO

Project Name

Project Category

No project category added.

Start Date

Deadline

Without deadline

Allow manual time logs?

Add Project Members

Choose Members

Project Summary

B I U


13

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 screenshot displays a task management application interface. On the left is a dark sidebar with navigation links: Dashboard, Leads, Clients, HR, Work (expanded), Contracts, Projects, Tasks (highlighted), Task Board, Task Calendar, and Time Logs. Below these are user profile icons, a plus sign, and a bell icon, followed by a 'Collapse Sidebar' button.

The main content area is titled 'Tasks' and features a 'NEW TASK' form. The form includes fields for 'Title', 'Project', and 'Task Category' (with a '+ Task Category' button). Below these is a 'Description' field with a rich text editor toolbar. A checkbox labeled 'Task is dependent on another task' is present. At the bottom of the form is a 'Task Board' section with 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'. The board itself shows columns for 'INCOMPLETE' and 'COMPLETED' tasks, with a 'My Tasks' dropdown in the top right corner.


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




- Clients
- HR
- Work
 - Contracts
 - Projects
 - Tasks
 - Task Board
 - Task Calendar**
 - Time Logs
- Finance
- Products

Collapse Sidebar


Task Calendar



TASK CALENDAR

Calendar shows the due tasks on their due dates.

<

>

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

B

I


U

13+

☐ Make Private

☐ Billable

☐ Set time estimate




month

week


day

list




Sun
31
7
14
15




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



- Dashboard
- Leads
- Clients
- HR
- Work
 - Contracts
 - Projects
 - Tasks
 - Task Board
 - Task Calendar
 - Time Logs**
- Products

Collapse Sidebar


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 displays the 'Finance' section of a software application, specifically the 'Estimates' sub-panel. The interface is divided into several sections:

- Sidebar:** A dark blue sidebar on the left contains navigation icons and labels: Dashboard, Leads, Clients, HR, Work, Finance (expanded), Estimates, Invoices, Recurring Invoice, Payments, and Expenses.
- Filter Results:** A light gray panel on the right of the sidebar allows filtering by 'Select Date Range' (calendar icon) and 'Status' (dropdown menu set to 'All'). It includes 'Apply' and 'Reset' buttons.
- Estimates Table:** A table titled 'Estimates' with columns: #, ESTIMATE#, CLIENT, TOTAL, VALID TILL, STATUS, and ACTION. It shows 'No data available in table' and 'Showing 0 to 0 of 0 entries'. Above the table are 'Create Estimate +' and 'Export' buttons, and a search bar.
- CREATE ESTIMATE Form:** A form below the table for creating a new estimate. It includes:
 - Estimate #:** A text field with 'EST#00' and a dropdown for '2'.
 - Client:** A dropdown menu labeled 'Choose Client'.
 - Currency:** A dropdown menu set to '₹ (INR)'.
 - Valid Till:** A date field set to '04-09-2021'.
 - Add Products:** A dropdown menu.
 - Table:** A table with columns: Item, Hsn/Sac, Qty/Hrs, Unit Price, Tax, and Amount. It has one row with 'Nothing selected' in the Tax column and '0.00' in the Amount column. A description field is below the table.

Dashboard

Leads

Clients

HR

Work

Finance

Estimates

Invoices

Recurring Invoice

Payments

Expenses

Expenses

+

Collapse Sidebar

Dashboard

Leads

Clients

HR

Work

Finance

Estimates

Invoices

Recurring Invoice

Payments

Expenses

Expenses

+

Collapse Sidebar

Filter Results

Select Date Range

Employee

Status

Project

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 Recurring

Add Recurring Expense +

Export

Show 10 entries

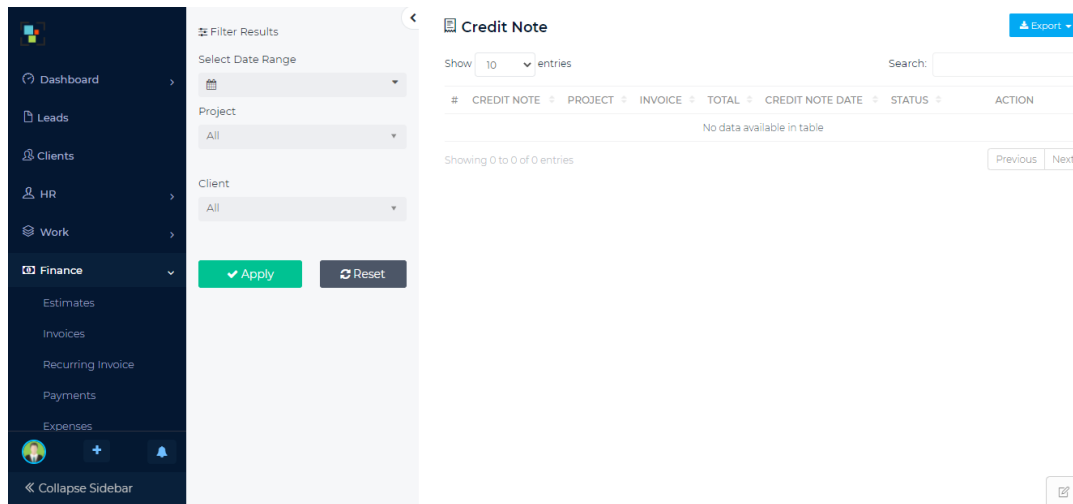
Search:

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

Showing 0 to 0 of 0 entries

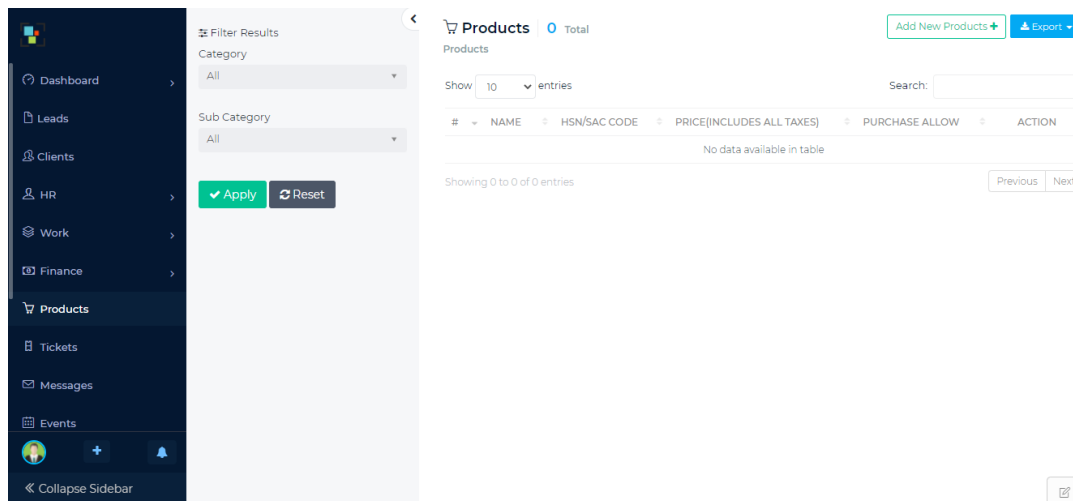
Previous

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.

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)

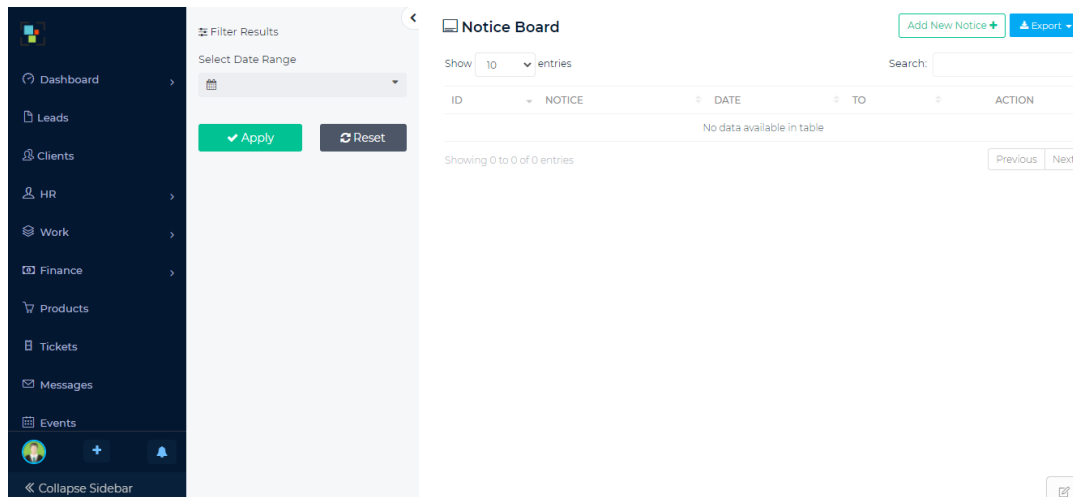
EVENTS:

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.

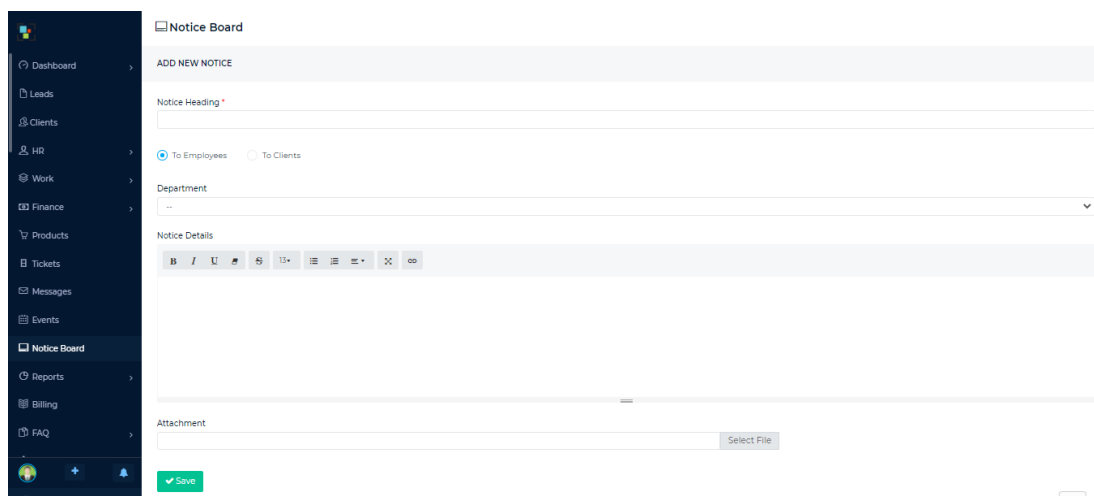
NOTICE BOARD:

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:

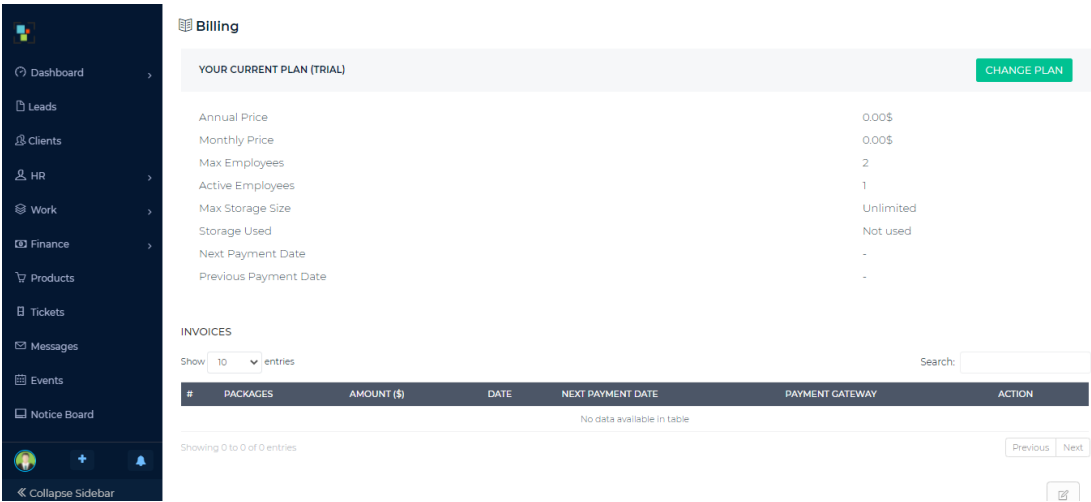
In the 'Reports' panel, the user can find various sub-panels

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

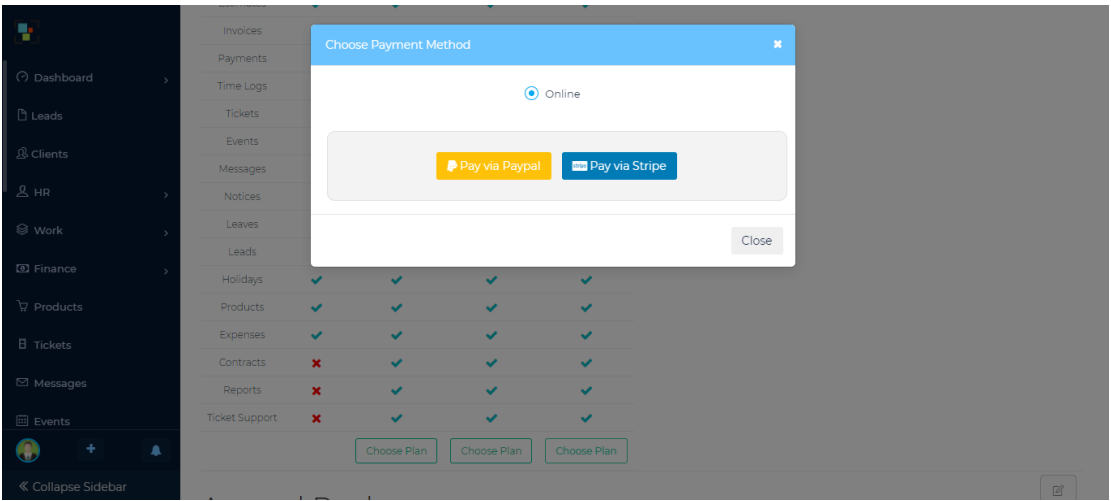
Task report,Time log report,Finance report,Income Vs expense report are represented graphically via pie and bar charts.

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'. It features a form with the following elements:

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

At the bottom of the sidebar, there is a 'Collapse Sidebar' button and a user profile icon.

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

KEVA SOFTWARE