NEXT VISION OPERATIONS (NVO)

Enterprise CRM Software Operational Manual & User Guide

A Comprehensive Operational Blueprint & Feature Reference for business administrators, sales representatives, operations managers, and system administrators. This user manual explains every feature, user journey, access role, pipeline workflow, activity calendar, analytics dashboard, data migration engine, and standard operating procedures (SOPs) in complete detail.

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CORE PLATFORM OBJECTIVE

Next Vision Operations (NVO) delivers end-to-end sales pipeline discipline, automated lead capture, streamlined calendar coordination, multi-user collaboration, and real-time revenue margin intelligence. Follow this operational guide to maximize sales velocity and operational excellence.

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Chapter 1: System Overview & Architecture

Next Vision Operations (NVO) is engineered as an enterprise-grade cloud CRM suite designed to provide growing enterprises with full visibility over their commercial pipeline.

1.1 Architecture & Technology Stack

- **Client Frontend:** Reactive SPA built with React 19, Tailwind CSS, Lucide Icons, and Recharts.
- **Backend API:** RESTful service powered by Node.js & Express with compression, rate limiting, and structured routing.
- **Database Storage:** PostgreSQL with transactional integrity, foreign keys, and optimized indexing.
- **Security & Token Auth:** Stateless JWT tokens with salted bcrypt password encryption and automatic 48-hour inactivity session expiration.
- **Multi-Tenant Isolation:** Complete data isolation per company identifier to guarantee data privacy.

Layer	Component	Operational Function
Web Frontend	React 19 / Vite	Interactive Kanban boards, smart calendar views, data charts, and real-time UI.
API Gateway	Node.js / Express	Validates user sessions, enforces role-based authorization, and handles data transactions.
Security & Auth	JWT + Bcrypt	Encrypted session handling, password hashing, and inactivity tracking.
Database	PostgreSQL	Relational schema for leads, deals, customers, activities, company configs, and audits.
Payments	Razorpay Gateway	Handles Pro subscription upgrades, webhooks, and invoice generation.

Chapter 2: Getting Started & Authentication

2.1 Account Registration & 14-Day Free Trial Provisioning

1. Visit the landing page and click **Start 14-Day Free Trial** (or navigate to /signup).
2. Provide your **Full Name**, **Work Email Address**, and secure **Password**.
3. Enter your **Company / Organization Name** to instantiate a dedicated enterprise workspace.
4. Your 14-day free trial is activated immediately without requiring any credit card information.

2.2 Login & Session Management

- **Sign In Portal:** Navigate to /login and enter your registered credentials.
- **Session Protection:** User activity is tracked across keyboard, mouse, and touch events. Idle sessions exceeding 48 hours are automatically logged out.
- **Password Recovery:** Navigate to /forgot-password to receive a secure token sent to your email, then set a new password at /reset-password.

Chapter 3: Role Permissions & Access Governance

NVO uses Role-Based Access Control (RBAC) to ensure that users access only the features relevant to their operational duties.

Feature / Capability	Super Admin	Company Admin	Sales Representative

Platform-wide Tenant Metrics	Full Access	No Access	No Access
Company Workspace Settings	Full Access	Full Access	Read Only
User Invites & Seat Management	Global Access	Company Scope	No Access
Subscription & Billing Upgrades	Global Override	Full Access	View Plan Only
Bulk CSV Data Imports	Full Access	Full Access	Pro Plan / Assigned
Deals Pipeline (Move Stages)	All Companies	All Company Deals	Assigned Deals
Create & Log Activities	Full Access	Full Access	Full Access
Delete Core Records	Full Access	Full Access	Restricted / Admin Only

Chapter 4: Executive Dashboard & KPI Tracking

The Executive Dashboard (/app) acts as the operational hub, presenting key business metrics, upcoming task deadlines, and pipeline distribution at a glance.

4.1 Key Performance Indicator (KPI) Cards

- **Total Pipeline Value:** Real-time sum of all active deals in progress.
- **Open Leads:** Count of unworked or newly captured prospect inquiries.
- **Active Deals:** Total commercial opportunities under active negotiation.
- **Deals Won:** Total deals successfully closed won in the current billing period.
- **Conversion Rate (%):** Ratio of converted leads into active deals.
- **Monthly Revenue Pace:** Cumulative booked value against company target goals.

4.2 Fast Operational Actions

- **+ New Lead:** Quickly register incoming phone or web inquiries.
- **+ New Deal:** Direct creation of enterprise opportunities straight into the pipeline.
- **Schedule Activity:** Book demos, client calls, tasks, or follow-up reminders.

Chapter 5: Lead Management Lifecycle

5.1 Lead Status Progression Workflow

Status	Description & Operational Definition	Recommended Action
New	Raw inquiry received; uncontacted prospect.	Assign to rep within 2 hours; initial outreach call.
Contacted	Initial outreach initiated via phone, email, or meeting.	Conduct discovery call; identify budget & requirements.
Qualified	Prospect meets budget, authority, need, and timeline (BANT).	Click 'Convert to Deal' to spawn deal & customer.
Proposal Sent	Formal pricing quote or scope delivered to prospect.	Schedule contract review meeting.
Unqualified	No budget, incorrect fit, or unresponsive prospect.	Log reason; archive or enroll in nurture sequence.

5.2 1-Click Lead Conversion

When a lead reaches **Qualified** status, clicking **Convert Lead** executes an automated transaction that:

1. Automatically creates an official **Customer Record** in the Customer Directory.
2. Automatically adds a new **Deal Card** in the visual pipeline under 'Lead In'.
3. Porting over all past activity history, phone notes, and contact details seamlessly.

Chapter 6: Interactive Deals Pipeline Board

The Deals Module (/app/deals) provides an interactive visual Kanban pipeline with stage-by-stage value aggregates, probability weights, and drag-and-drop transitions.

Stage	Probability	Stage Exit Criteria & Goals
1. Lead In	10%	Inquiry converted; identify key decision maker and budget.
2. Contact Made	25%	Discovery meeting held; pain points & requirements logged.
3. Needs Analysis	40%	Technical scope, user seat count, and implementation timeline confirmed.
4. Proposal / Quote	60%	Commercial contract & pricing quote delivered to client.
5. In Negotiation	80%	Final terms, discount adjustments, and SLA sign-off.
6. Closed Won	100%	Agreement signed; payment processed or PO received.
7. Closed Lost	0%	Opportunity cancelled. Mandatory loss reason logged.

6.2 Deal Details View (/app/deals/:id)

- **Deal Value & Margin:** Contract amount, currency, and calculated profit margins.
- **Expected Close Date:** Due date with overdue alerts.
- **Associated Customer:** Direct links to customer profile and stakeholder contacts.
- **Audit Timeline:** Complete chronological trail of stage movements, notes, and logged calls.

Chapter 7: Customer Directory & 360° Account View

7.1 Customer Account Management (/app/customers)

- **Company Directory:** Searchable database of all active client organizations.
- **Customer Lifetime Value (LTV):** Real-time calculated sum of all historical closed-won deals.
- **360° Detail View (/app/customers/:id):** View all past and current deals, communication logs, scheduled activities, and contact persons in one unified dashboard.

Chapter 8: Activities, Calendar & Task Scheduling

The Activities Engine (/app/activities & /app/calendar) coordinates team communications, client meetings, task reminders, and prospect follow-ups.

8.1 Activity Types & Priority Flags

- **Phone Call:** Prospect check-in, follow-up, or discovery outreach.
- **Meeting / Demo:** Product demonstration, executive pitch, or contract review.
- **Email Follow-Up:** Sending proposals, brochures, or contract documents.
- **Task / To-Do:** Internal administrative work, proposal writing, or legal review.
- **Priority Levels:** Low (Gray), Medium (Blue), High (Amber), Urgent (Red).

8.2 Smart Calendar & Follow-up Flow

- **Multi-View Modes:** Seamlessly toggle between Month, Week, and Day agenda views.
- **Outcome Logging:** When marking an activity complete, users are prompted to record summary notes and immediately schedule the subsequent follow-up task.

Chapter 9: Analytics & Revenue Intelligence

The Analytics Dashboard (/app/analytics) provides leadership with actionable sales intelligence to eliminate pipeline bottlenecks and forecast revenue.

Metric / Report	Plan Tier	Operational Value & Usage
Pipeline Conversion Funnel	Free & Pro	Visualizes stage-by-stage drop-off and progression efficiency.
Lead Source Attribution	Free & Pro	Compares won deals by channel (Website, Cold, Referral, Campaigns).
Monthly Revenue Projection	Free & Pro	Projects forecasted cash flows based on probability-weighted deal values.
Sales Rep Activity Velocity	Free & Pro	Ranks reps by completed calls, closed revenue, and meeting activity.
Profit Margin Analysis	Pro Plan Only	Calculates gross profit margins per deal after estimated delivery costs.
Pipeline Velocity & Stage Aging	Pro Plan Only	Highlights stagnant opportunities lingering beyond normal cycle times.

Chapter 10: Bulk Data Migration & CSV Ingestion

NVO includes a powerful CSV data ingestion engine (/app/imports/review) to migrate legacy records without data loss or corruption.

10.1 The 4-Step Bulk Import Process

1. **File Upload:** Upload standard comma-separated .csv spreadsheet.
2. **Intelligent Column Mapping:** The engine automatically matches CSV columns to CRM fields (Name, Email, Phone, Company, Source, Status).
3. **Validation & Preview:** Review mapped records; fix missing values or syntax errors directly in the interactive review grid.
4. **Batch Commit:** Click **Import Records** to atomically insert all records into the database.

Chapter 11: Team Management & Workspace Settings

11.1 Team Member Onboarding & User Seats (/app/team)

- Click **+ Invite Team Member**, specify their email, and assign their role (**Company Admin** or **Sales Representative**).
- The colleague receives an invitation link (/accept-invite) to configure their personal login credentials.

11.2 Workspace & Profile Preferences (/app/settings & /app/profile)

- **Company Settings:** Configure organization name, industry, default currency (■ INR, $ USD, € EUR), and timezone.
- **User Profile:** Update personal profile details, upload avatar, and change password securely.

Chapter 12: Billing, Subscription & Super Admin Console

Plan Tier	Price	Seats Included	Included Features
14-Day Free Trial	■0 / 14 Days	1 User Seat	Core CRM access, deals pipeline, lead management, standard analytics, standard support.
Pro Plan	■499 / Month 50% Off (Orig ■999)	Up to 6 User Seats	Advanced analytics (+2 pro charts), bulk CSV imports, margin analytics, priority 24/7 support.

12.2 Pro Upgrade Support Procedure

To upgrade to the Pro Tier, Company Admins can initiate an upgrade inquiry directly from the billing screen or contact NVO Enterprise Support via email at **admin@indiaskillcloud.com**.

12.3 Super Admin Management Console (/admin/*)

- Platform-level monitoring of registered companies, tenant subscriptions, and active seats.
- Administrative override and diagnostics tools for rapid enterprise support assistance.

Chapter 13: Standard Operating Procedures (SOPs) & FAQ

13.1 Daily Sales Representative Checklist

1. **09:00 AM — Calendar Review:** Open /app/calendar to review scheduled calls, meetings, and demos.
2. **10:00 AM — Lead Triage:** Open /app/leads to qualify incoming inquiries within the 2-hour SLA window.
3. **02:00 PM — Pipeline Updates:** Advance deals across Kanban columns in /app/deals; update close dates and values.
4. **05:30 PM — Activity Log & Next Steps:** Mark completed tasks, record customer notes, and schedule subsequent follow-ups.

13.2 Weekly Sales Manager / Admin SOP

1. **Monday — Pipeline Velocity:** Review /app/analytics for stalled deals in Proposal or Negotiation stages.
2. **Wednesday — Margin Review:** Verify gross profit margins and forecast monthly quota achievement.
3. **Friday — Workload Balancing:** Reassign unworked leads and review rep activity velocity.

OPERATIONAL FAQ & ENTERPRISE SUPPORT

Q: My session logged out automatically while I was away. Is my data lost?
A: No. All updates are committed immediately to the database. The 48-hour inactivity timeout is an automated security measure.

Q: How do I invite more than 1 user during my Free Trial?
A: The Free Trial includes 1 admin seat. To add up to 6 team members, contact NVO Support at admin@indiaskillcloud.com to activate Pro.

Q: What should I do if my CSV import reports formatting errors?
A: Ensure all required fields (Name, Email) are filled and email syntax is valid. You can edit cells directly in the Import Review screen before submitting.

Q: How do I contact official technical support?
A: Email **admin@indiaskillcloud.com** for 24/7 technical and billing assistance.