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Client Relationship and Workflow Automation System with Restricted Access Control

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ABSTRACT: This project aims to develop a comprehensive system that facilitates seamless access and management of various business modules, including Sales, Design, Plan Procurement, Project Management, Billing, and Service. The system is built with a secure login page and a verification code mechanism to ensure that only authorized personnel can access specific modules. Each module is designed to interact with data in Excel format, enabling users to convert and export information efficiently. The Sales, Design, Project Procurement, Project, Billing, and Service modules each contain functionality that is critical for business operations, while the Excel conversion feature provides a powerful tool for exporting, analyzing, and reporting data. The system ensures data integrity and security while offering an intuitive interface for users to manage operations across different departments. Ultimately, the project streamlines business processes, improves data management, and enhances productivity by integrating these functionalities into a unified platform.The Sales module allows for managing customer interactions, tracking sales performance, and generating sales reports. The Design module supports project design activities, including resource planning and task allocation. The Project Procurement module streamlines the procurement process by managing supplier data, purchase orders, and inventory management. The Project Management module tracks the progress of ongoing projects, monitors milestones, and generates project-related documentation. The Billing module handles invoicing, payment tracking, and financial reporting, while the Access Control module restricts access to sensitive information based on roles, ensuring that only authorized users can view or modify critical data.

INTRODUCTION

The domain of this project revolves around building an enterprise management platform that integrates different business modules with a focus on security, data management, and seamless user interaction. The system leverages a variety of web technologies, including HTML, PHP, JavaScript, CSS, MySQL to create a robust, scalable, and user-friendly platform. HTML forms the backbone of the user interface, providing the structure for web pages. It is used to define the layout and content of the system's pages, including the login page, individual module interfaces, and reporting sections. HTML elements such as forms, tables, and buttons are used to capture user input, display data, and facilitate interactions with the different PHP serves as the server-side scripting language that handles business logic, database interactions, and user authentication. It is responsible for processing user requests and managing session data for secure access to the platform. The login page and verification code mechanism are built using PHP to verify user credentials and ensure role-based access control across modules like Sales, Design, Project Procurement, Billing, Service and others. PHP also handles the dynamic generation of data reports and exports, enabling Excel conversions for the respective modules. JavaScript is used to enhance the user experience by adding interactivity and dynamic content to the platform. For example, JavaScript is used for form validation on the login page, ensuring that user inputs (such as email addresses and passwords) are in the correct format before submission. It is also used for dynamic updates, such as showing or hiding content based on user interactions, submitting data asynchronously without page reloads (AJAX), and providing real-time feedback on the system's interface
CSS is employed to style the HTML elements and create a visually appealing, responsive interface. The layout, colors, fonts, and overall design of the platform are governed by CSS, ensuring that the system is not only functional but also intuitive and user-friendly. CSS is also used to make the platform responsive across different devices (desktop, tablet, mobile), providing a seamless experience to users no matter what device they are using.

PROPOSED SYSTEM

The proposed system is a secure, role-based web application designed to enable authentication and access control across multiple business modules, including Sales, Design, Project Management, Procurement, Billing, and Support. It incorporates login authentication, verification codes, and separate access levels for staff and managers. The system features a robust authentication mechanism, including secure login via email/password or Single Sign-On (SSO), and Multi-Factor Authentication (MFA) using

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verification codes through email, SMS, or OTP. Role-Based Access Control (RBAC) ensures that staff have limited access to assigned modules, managers receive higher-level access with additional privileges, and a super admin manages users and permissions through an admin panel. Security measures include encryption for user data and credentials, session management to prevent unauthorized access, and automatic logout after inactivity.Each business module follows defined access control rules, where staff can perform specific tasks, such as updating leads in the Sales module, managing tasks in the Project module, placing purchase requests in Procurement, and generating invoices in Billing. Managers have higher-level responsibilities, such as approving deals, tracking deadlines, managing vendor relationships, and overseeing financial reports. The Access Control module allows staff to request access permissions, while managers have the ability to grant or revoke access rights.The system architecture consists of a frontend built using React.js, Angular, or Vue.js to provide a dynamic user interface with a responsive design compatible with desktop and mobile. The backend is developed using frameworks like Node.js, Django, or Laravel, handling authentication and data processing, with MySQL serving as the database for storing user details, access logs, and module data. RESTful APIs ensure seamless module communication. Security measures include JWT-based authentication for session security, data encryption to prevent unauthorized leaks, and role-based permission checks before granting access to any module.The login and verification workflow involves users entering credentials, receiving a verification code via email or phone, and entering it to complete authentication. The system then verifies the user's role and grants access to specific modules accordingly, restricting access only to authorized areas. Audit logs track login attempts and module interactions for security monitoring. Additional system features include an admin dashboard for managing user roles and permissions, audit logs and reports for tracking user activities, third-party integration with services like payment gateways and email platforms, and cloud-based hosting for enhanced scalability and reliability.

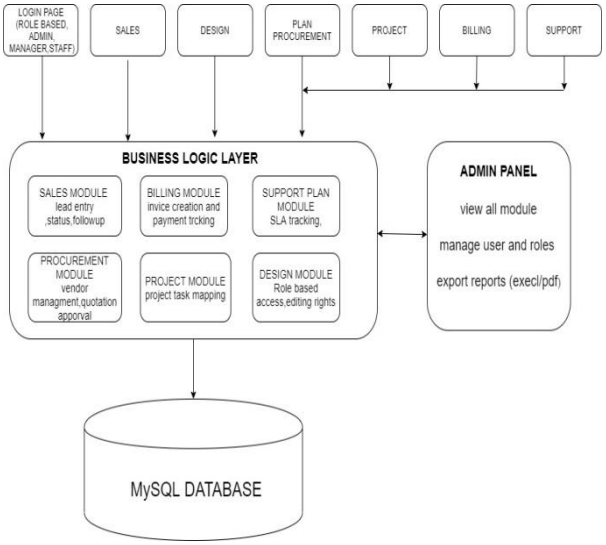

FIG 1:Architecture diagram

Fig 1 represents the Architecture should follow a multi tier structure, typically comprising the presentation layer (frontend), business logic layer (backend), and data layer (database) to ensure modularity and maintainability. The frontend should be built using modern frameworks like React.js, Angular, or Vue.js, providing a responsive and intuitive user experience. The backend should use technologies like Node.js , Java or PHP to handle authentication, authorization, and business logic fordifferent modules.A role based access control (RBAC) system should be integrated into the architecture, ensuring that staff and managers can only
access their assigned modules. Authentication and verification mechanisms, such as OAuth 2.0, JWT, or LDAP, should be used to enhance security, along with an SMTP or SMS gateway for OTP based verification. The database layer should use relational databases like MySQL, PostgreSQL, or Microsoft SQL Server to store user credentials, module specific data, and transaction records, ensuring ACID compliance for data consistency.A robust and scalable system architecture is fundamental to the successful implementation and long term maintainability of any enterprise application. The architectural design should align with the project's functional requirements, performance expectations, and security needs, while also accommodating future growth and integration. By leveraging modern design principles and best practices, the architecture can ensure seamless user experiences, efficient data processing, and secure system interactions.The primary goal of the architecture is to establish a well structured foundation that promotes modularity, reusability, and scalability. A layered approach separates concerns across different tiers, enabling teams to develop, test, and deploy each component independently. This not only improves development efficiency but also enhances fault isolation, simplifies maintenance, and supports technology upgrades with minimal disruption. Strategic

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architectural planning ensures the system remains adaptable to changing business needs and emerging technologies.

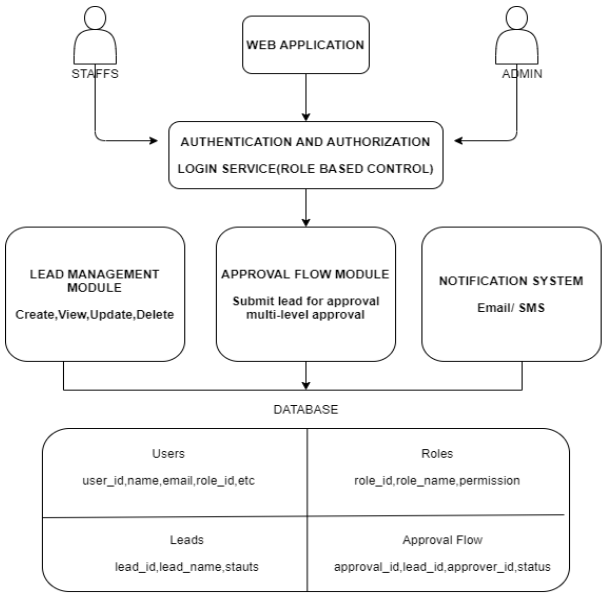

FIG 2:Data design diagram

FIG 2 represents The system should follow a data design database model using MySQL,or Microsoft SQL Server, where structured data relationships between users, roles, and modules are maintained using primary and foreign keys.The database should include a User Management Table, storing details such as user ID, name, email, password (hashed), role (staff or manager), and status (active/inactive). A Roles & Permissions Table should define access control levels, Ensuring that users only access authorized modules. The Authentication Table must securely store multi factor authentication (OTP, session tokens, and login timestamps)

to manage verification processes.Each module Sales,Design, Project, Procurement, Billing, and Support should have its own dedicated tables to store relevant data. For instance, the Sales Module should include customer details, transaction records, and sales reports, while the Procurement Module should store supplier information, purchase orders, and approval statuses. The Billing Module should manage invoice records, payment statuses, and financial reports.

CONCLUSION AND FUTURE ENHANCEMENT

In conclusion, the website provides a secure and efficient login and verification system, ensuring controlled access to various modules such as Sales, Design, Project, Procurement, Billing, and Support Management. The platform is designed with role based authentication, where staff and managers have distinct access levels, enhancing data security and operational workflow. By implementing this structured access control, the system ensures seamless coordination, improved accountability, and optimized business processes, ultimately contributing to a more productive and organized work environment.The website offers a secure and user friendly login and verification system, ensuring that only authorized users can access the platform. With a structured authentication process, users must verify their identity before entering the system, enhancing security and preventing unauthorized access. This verification mechanism strengthens data protection and ensures that sensitive business information remains confidential.The platform is designed to support multiple modules, including Sales, Design, Project, Procurement, Billing, and Support. Each module is tailored to specific business functions, allowing teams to work efficiently within their respective areas. By organizing operations into separate modules, the system enhances workflow management and improves overall productivity.One of the key features of the system is role based access control, which differentiates permissions for staff and managers. Staff members can access only the necessary functionalities relevant to their roles, while managers have broader control to oversee and manage operations. This structured access ensures that information is shared appropriately and prevents unauthorized modifications.Overall, the website serves as a comprehensive business management solution, integrating security, efficiency, and accessibility. By providing a well defined access hierarchy, it streamlines operations, improves collaboration, and supports effective decision making. With its secure login system and module based structure, the platform enhances business performance and ensures a smooth operational workflow.To further improve the functionality and security of the website, future enhancements could include implementing multi factor authentication (MFA). This would add an extra layer of security beyond the verification code, such as

biometric authentication or email based authentication. By integrating advanced security measures, the system can better protect sensitive business data from unauthorized access and cyber threats.Another enhancement could be the introduction of an AI powered analytics dashboard for each module. This would allow managers to gain real time insights into sales trends, project progress, procurement efficiency, and billing status. By leveraging data analytics, businesses can make informed decisions, optimize workflows, and enhance overall operational performance.Additionally, integrating a mobile friendly interface or a dedicated mobile application would improve accessibility for users. This would enable staff and managers to log in, approve requests, and monitor progress on the go, increasing flexibility and efficiency. Push notifications could also be added to alert users about important updates, approvals, or pending tasks.Finally, enhancing role based access with customizable permissions would allow businesses to define specific access levels for different users. Instead of just staff and managers, there could be additional roles such as team leads, auditors, or external partners with tailored access. This would provide greater control over data security while ensuring that every user has the necessary tools to perform their tasks effectively.

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