



Project Board

Integrated Project, Task and
Team Evaluation Tool

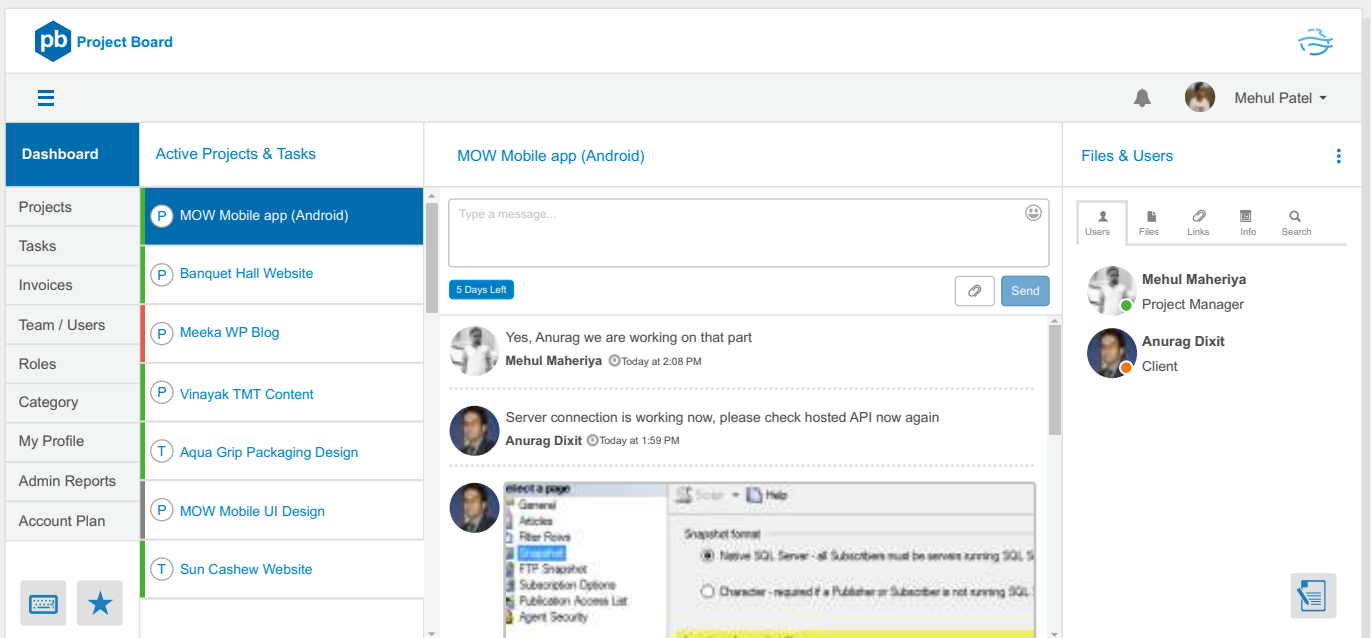
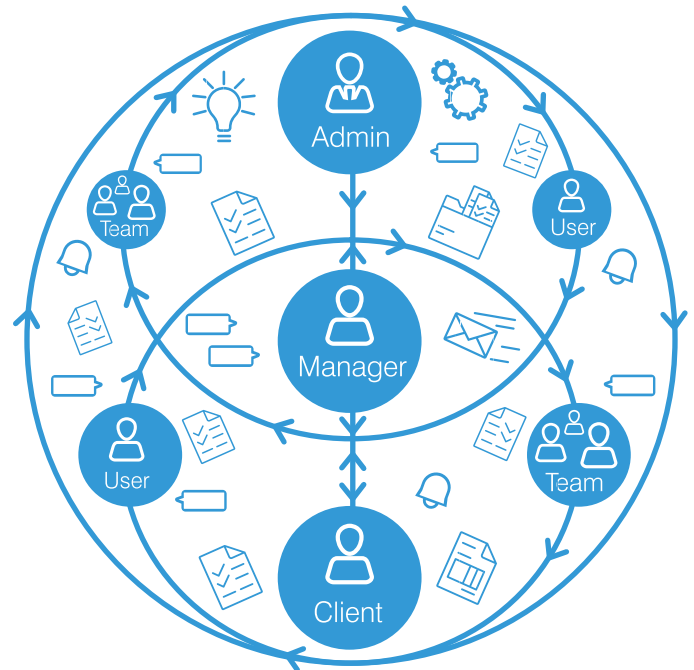
Manage project flow right from
admin to manager to team to
client with a simple and easy to
use dashboard.

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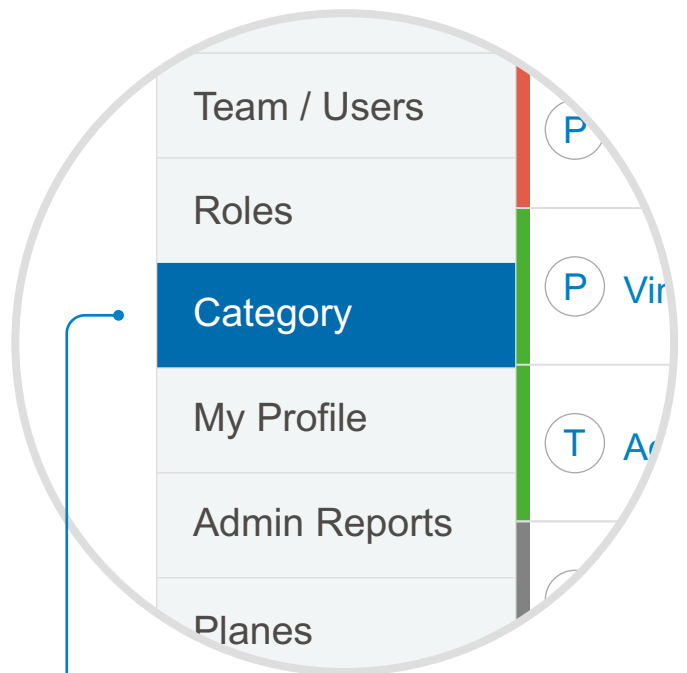
Project Board system flow overview

Flexible flow design of project and task management, full control of role and rules of each user in organization with user evaluation and reporting.



Category: Business or Work

When you start with the Project Board, just add business or project category on that to run your business. As an example, if you are IT Company you can create category like software development, mobile app development etc., same as if you are Event Planner Company you can create category like marriage events, corporate events. This category will help you to get an idea about monthly project revenue and report in company.



Add Category ×

Add different category for your business vertical

Category Name:

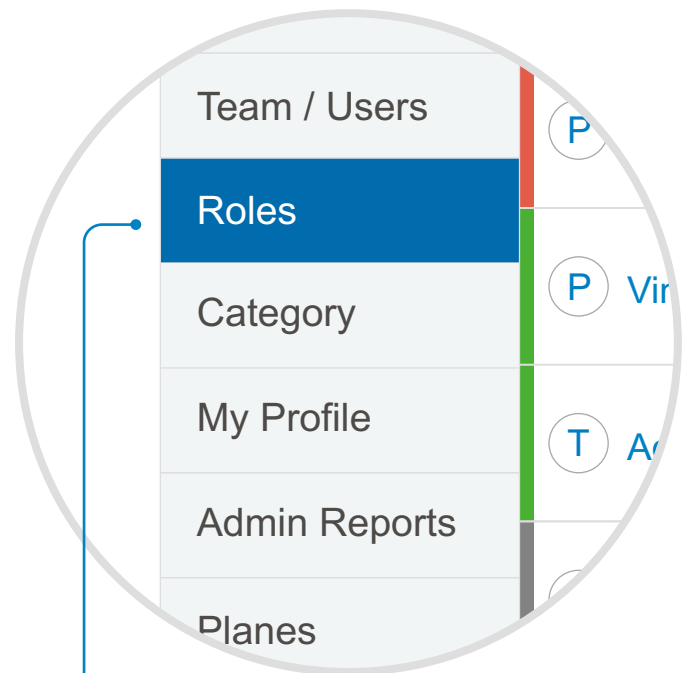
Category Name like 'Marketing' OR 'App Development' etc.

Category		Actions
Sales & Marketing		
Web Development		
Mobile App Development		
Web Design	30	
Creative Design	55	
Digital Media	12	
Creative Content	10	

Previous **1** Next

User Roles and Access Privileges

According your organization you can add user roles like manager, marketing etc., with particular access of the project board like add, edit project, task, user and create invoice. If you are IT Company you can add roles like project manager, web developer, web designer etc. Same way if you are HR Company you can add roles of hiring manager, accountant and placement cell etc., and usages roles for that particular part of operation.



Create users roles

Create user roles from below selection, according roles, user will get access.

Category Name:

Select / Deselect all: ☐

Project Rights

☒ ON

View Projects

☐ OFF

Add Projects

☐ OFF

Edit Projects

☐ OFF

Delete Projects

Task Rights

☐ OFF

View Tasks

☐ OFF

Add Tasks☐ OFF☐ OFF

User Rights

☒ ON

View Users☐ OFF☐ OFF☐ OFF

Invoice Rights

☒ ON

View Invoice☐ OFF☐ OFF

Close

Submit

HR

1

Showing 1 to 7 of 11 entries

Previous

1

2

Next

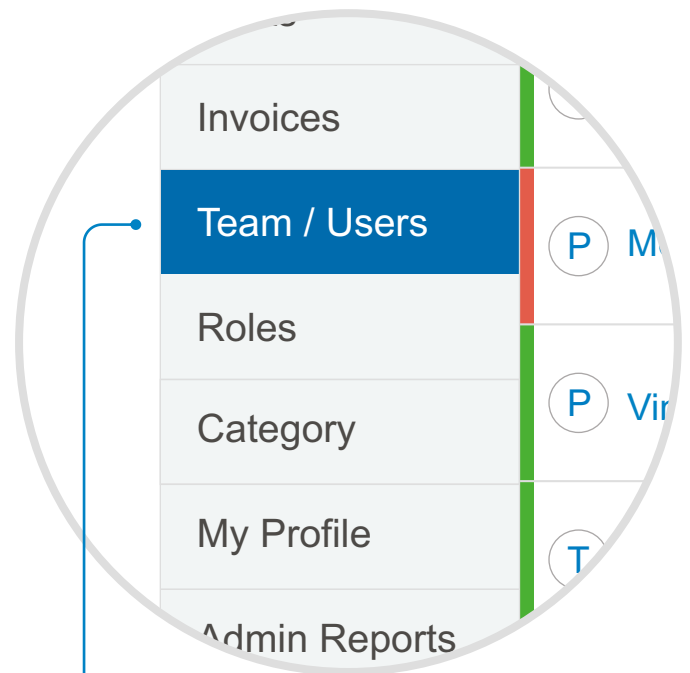
+ Add Roles

Actions

Add Team Members and Client

Now you just add team members with name and his/her respected role of operations in Company, and according user will get project board access to use for. As example, you add project manager user with role of manager and give all access of project, task, user and invoice, then the project manager can do add project, task, add user and add client as well. You can also invoice your client for some project to collaborate with team.

While you add the team member do not forgot to add hourly rate for that particular user, this will help you in reporting system.



Users

Name
David
Fenil
Nirav
Mahesh
Dhruv
Pratik
Manish
Addi

Add / Invite team member for project collaboration.

Full Name:

User Name:

Email:

Assign Role:

Assign Role

Per Hour Rate:

Close

Submit

+ Add Client

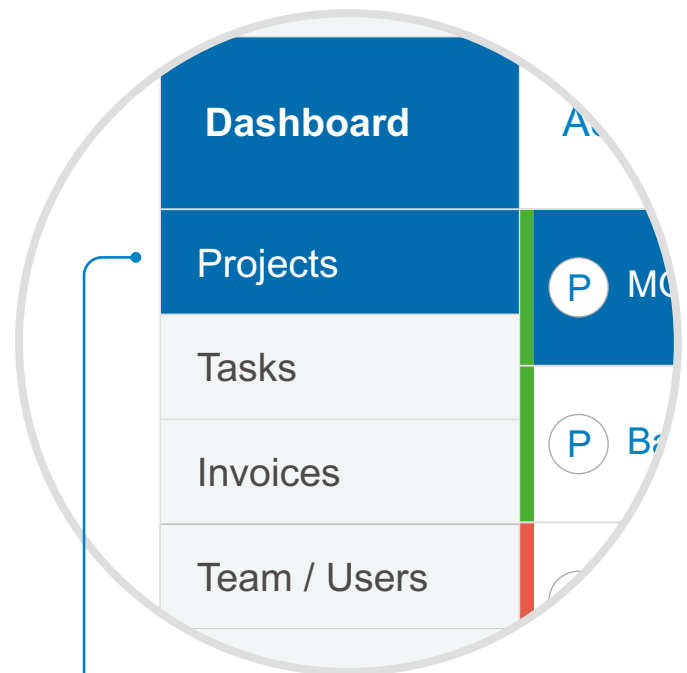
+ Add User

	Actions
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Project Management – Add Project

Add your project with name of project, add description, choose category and project cost, add end date, add project files and assign to team members and client. This project invitation goes to your client and assigned users to get started with project communication. You can run project for multi tasks and milestones operations with as many as team members to work on individual tasks.

While adding project you can add team member at a time or later on when you wish. You can also add many users to work with project collaboration.



Add new project

Add new project for client and assign to team.

Project Name: <input type="text" value="Add your project name"/>	Project Currency: <input type="text" value="Select Currency"/>	Project Amount: <input type="text" value="Amount"/>
Project Description: <input type="text" value="Add your project description:"/>	Select Client: <input type="text" value="Add client for project"/>	
Project Category: <input type="text" value="Select Category"/>	Assign Team (Optional): <input type="text" value="Assign team from the list"/>	
Start Date: <input type="text" value="2017-07-08"/>	End Date: <input type="text" value="2017-07-21"/>	

Add Files:

☐ OFF

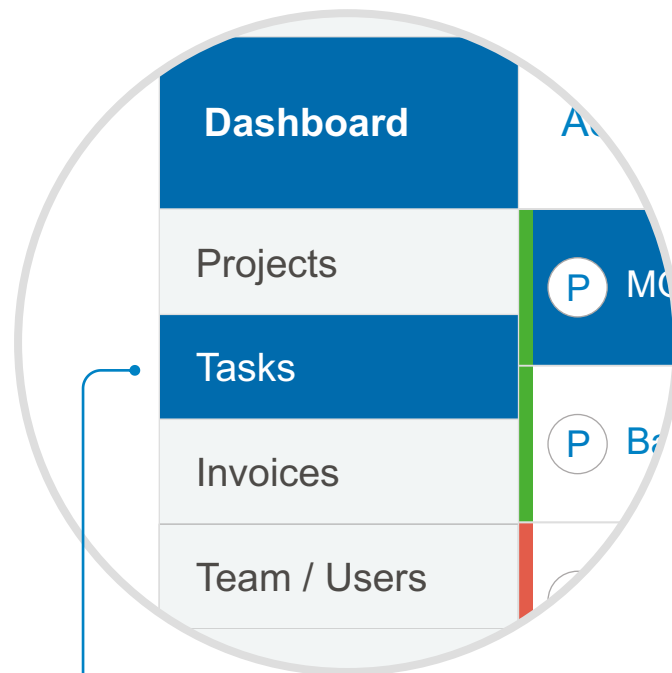
Background Table:

Projects	Name	Weekly S	MOW App	Mannta F	UNI Logo Design	Kendari Pater	Creative Design	For USD	Delay	Status	Actions
	Job Portal Development					Maheriya M	Web Development	2500 USD	Active		<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Task Management - Add Task:

If you have a big project and in that many team members are working under particular task of that project, then you can add task under that project within deadline of the project and assign to respected user you wish for that task work.

Even more, if you have individual task (not under any project) that you wish to complete with team user, then you can create task without selection of any project and assign to team member to do work on that task. You can use task for one to one communication with internal team to track task reporting.



Tasks

Name

Search Task

Sun Cashew WP

Add new theme in

Create WP BLOG

Co-Pack website

Shakti Masala We with WP

Add task

Add new task under project or separate task to collaborate

Task Name:

Task Description:

Add your task description:

Start Date:

End Date:

Select Project (Optional):

Select Project

Note: Project with status "Inactive & Completed" will not be shown here.

Assign Member:

Assign team from the list

Close

Auto Close ☐

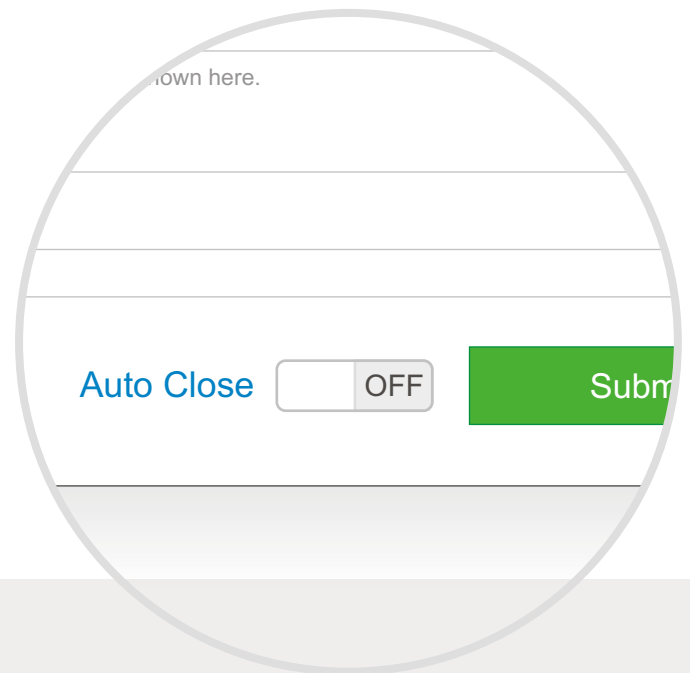
Submit

+ Add Task

	Status	Actions
Website	Active	Edit Delete
	Completed	Edit Delete
site	Completed	Edit Delete
minators	Delay	Edit Delete
la Website	Active	Edit Delete

Auto Close Project and Task:

Every project and task have start date and deadline to complete work, in this case you can choose auto close on / off. So when you create project or task with auto close on, the project or task will close automatically on the end date and it become status in feedback, and user evaluation mode.

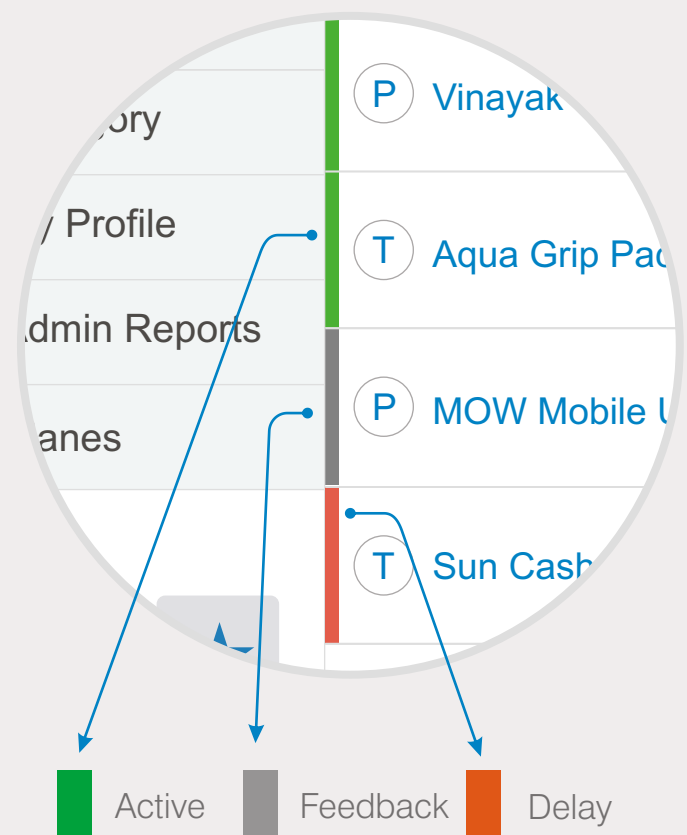


Mode of Project and Task:

For every project and task, when it is created and running within deadline then it appear as an **Active** green bar with green label and also with the number of days left to complete. Any project or task miss the deadline than it goes in **Delay** red bar and with label of number of days running late.

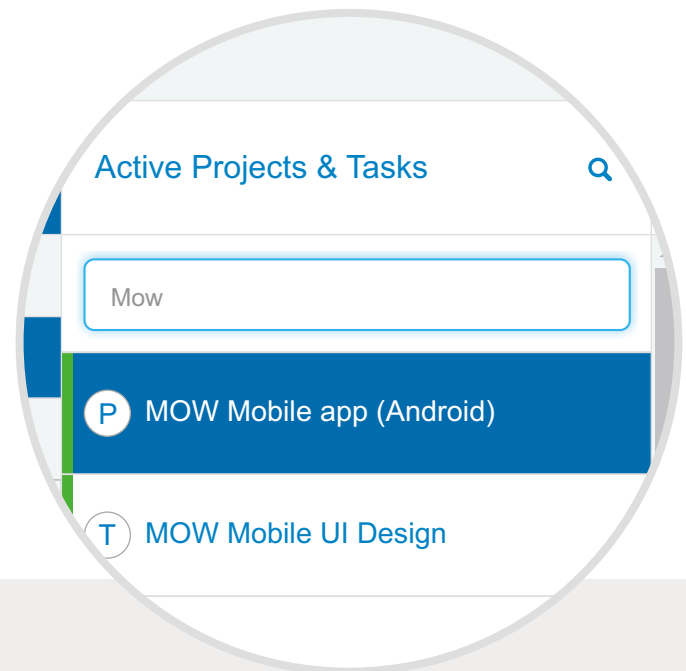
Any project that you declared as completed goes in **Feedback** mode and it appears with gray bar and in that you can give project feedback for that particular project and its users.

Only projects and tasks with the label of Active, Delay and Feedback mode appear on the dashboard. The completed, inactive and cancelled project you can find in to project list tab.



Search Project and Task:

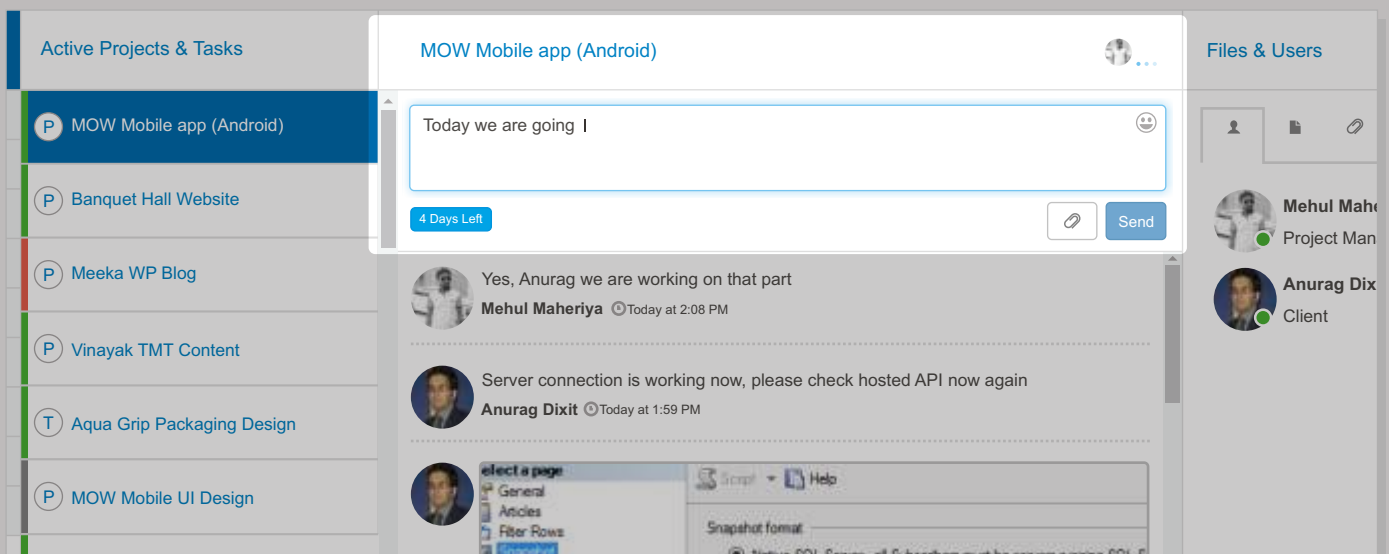
As an admin or project manager you have many projects and task running in active project and task panel. Through search, you can find easily your project and task and make do communication on that project or task. Even on the any project and task automatic come up when it have any message in communication thread.



Project and Task Communication:

On a click of the active project or task you will have a communication window to do chat or communication of the particular project or tasks. While communication in the user area, each user and client appear in this project or task with respected roles and status of online, offline or away.

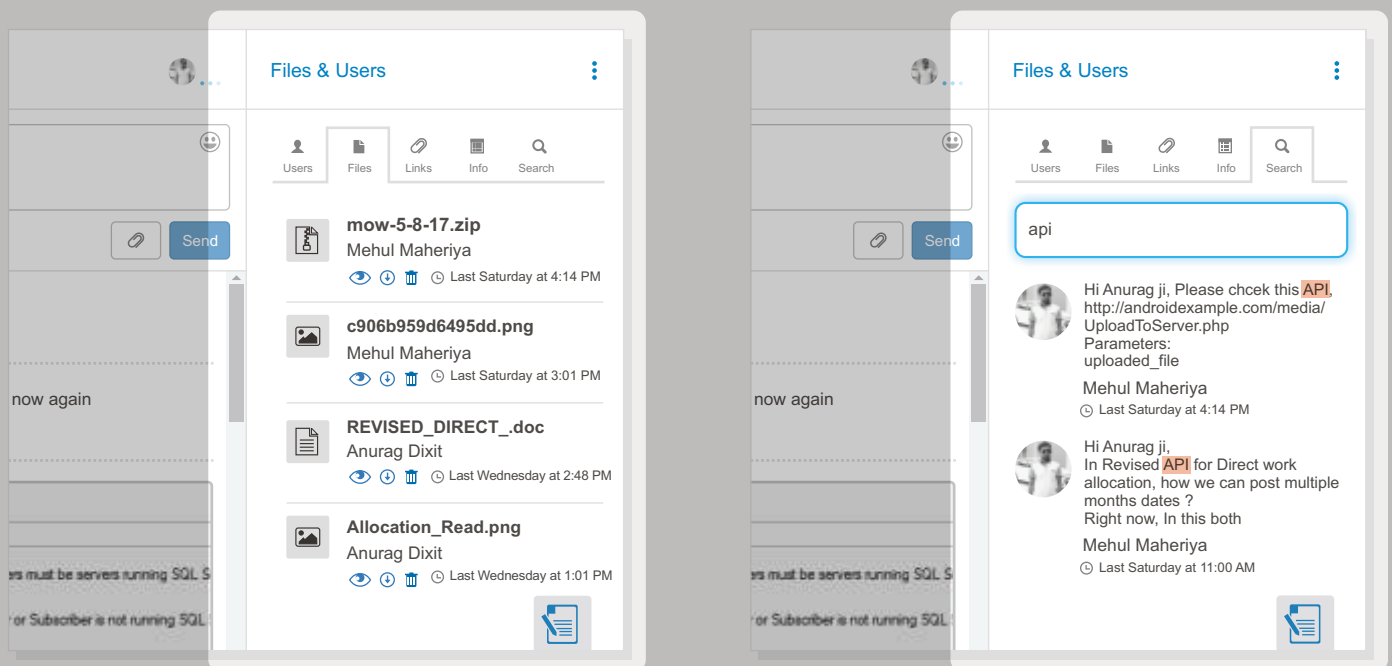
For long message communication you can type with the shift enter to type in to multiple lines.



Sharing Files and Links:

Sharing Files and Links: In project or task communication area you can upload files with a simply upload option, drag & drop and even with paste image from the clipboard. In communication thread you will have preview of the files and on click you get preview of the file and with downloads too.

In the right side, the files section contains all the files of that particular project and task for your ready reference. Even more in the whole communication, if you have shared links that gets stored in to link section so that will be easy for you to get links easily.



Project and Task Communication Search:

The project or task with larger communication thread, just use search on the right section and it is easy to find the particular keyword which helps to find previous communication and will save time to drag to the old communication.

Project Invoicing:

Creating the project invoice is a very easy and quick. Just go to invoice section, select project for that you wish to create invoice. Add description and amount, add new line for adding more items in invoice, add tax or discount if any applicable, add narration or terms for your information and submit to create the invoice.

For one project you can create one or more invoices, like advance payment invoice, first milestone or task invoice and final project invoice.

The created invoice goes to client and can able to pay online from client side. Once client pay it will automatic change status of paid. Even you can add manually add client payment and declare it paid.

For office account purpose you can also take a print from the pdf file.

Invoices

Invoice Id	Project
KDIUX7N05	M
KDIXSSRGZ	Fr
KDIQV6SMU	AT
KDIQIFXX3	M
KDILNEBWR	Vi
KDIHFLOCT	He
KDIGOK5M7	De

Create Invoice

Create invoice for projects.

Select Project:

Select Project

Description:	Quantity	Price	Amount
Item Name	1	0	0.00

+ Add new item

Subtotal	0.00
GST %	0 0.00
Discount %	0 0.00
Total	0

Terms and Condition

Add terms and condition if any.

Close Submit

Status

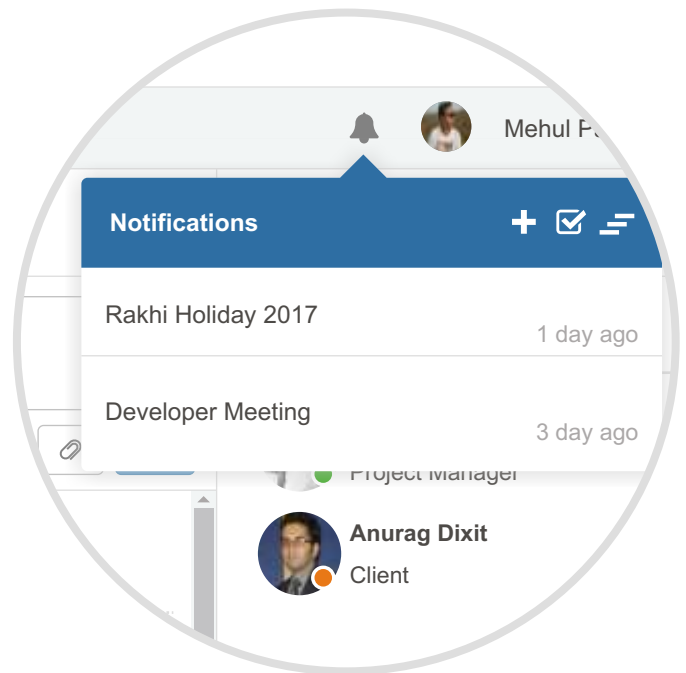
Status	Actions
Unpaid	
Paid	
Paid	
Paid	
Paid	
Unpaid	
Cancelled	

Add Invoice

Notification:

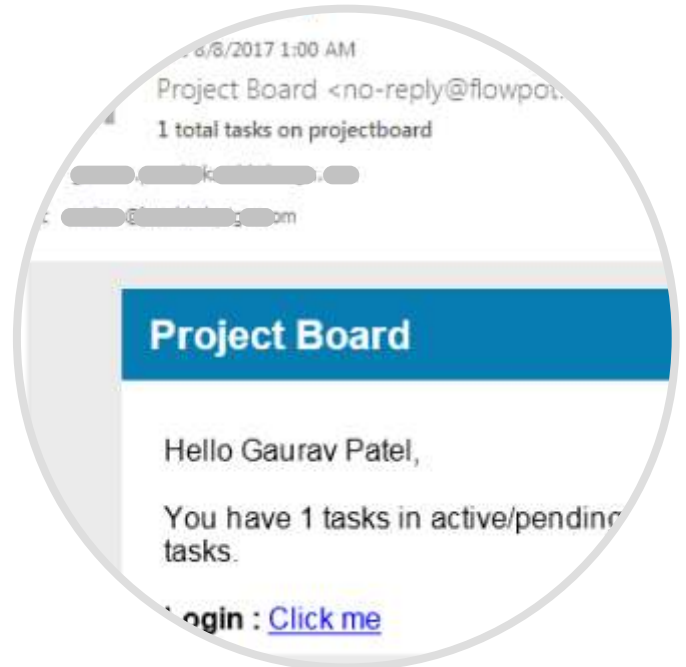
In this notification section admin will have privilege to set announcement message for particular group of roles users or all for all users. Once admin set the announcement it will appear as a notification in all selected team member to take a look the same.

Even you are not on the project board window you will get browser notification popup with the message and notification sound.



Auto Follow up:

No worry, if you missed any message in any project or task communication, an email will remind you for any unread messages. So you can get login Project Board and reply on the project or task that you



Even more from completed projects and task:

*This Feature available in Pro Plan only

In project / task section, you can check the History, Rating and Feedback of the project / task having "Completed" status. So in completed project/task you will have quick information of the Rating, Feedback, Invoices (For Project Only), User and Client information. We also have another feature to "Duplicate" any project / task with same information and dates interval.

The screenshot displays the Flowpot project management interface. A project overview card is shown with a 'Statistics' overlay. The overlay contains the following sections:

- Statistics**: Includes tabs for Overview, Invoice, and Client.
- Project Timeline**: Shows a green progress bar at 100% for the period from Jun 13 2017 to Jul 23 2017.
- Users**: Lists three users: Sweta Shah (CRM), Chetan Prajapati (Creative Designer), and Nisha Patel (Creative Designer).
- Actions**: Three icons are shown: a star (Project Rating and Feedback), a clock (Project History), and a document with a plus sign (Duplicate this project).

Arrows point from the icons to their respective labels:

- Star icon: Project Rating and Feedback
- Clock icon: Project History
- Document icon: Duplicate this project.

Admin Report:

*Report Feature available in Pro Plan only

In administrator's dashboard, we have various graphical reports to get an overall work progress, business and team evaluation of an organization.

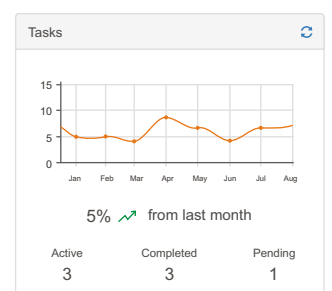
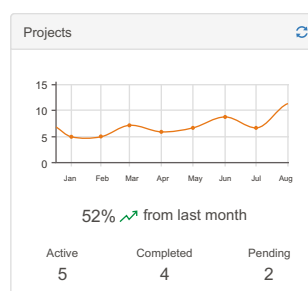
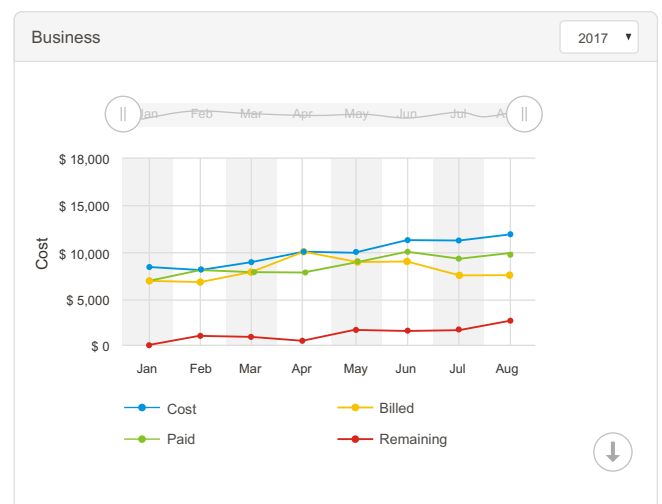
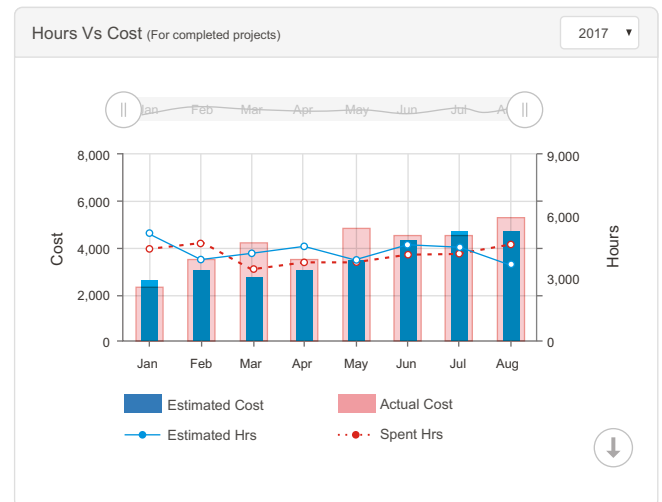
Hours Vs Cost: This bar and line chart give you report of the estimated hours used in organization by all team members and actually spent hours by team members for various project and tasks. Same way you will get report about estimated amount of all team members in organization and actual cost covered from the completed project and task amount month wise.

Business: In the line board of the business table it shows the total business done in month by the project invoicing. Also, it will appear the total billed amount, paid and remaining amount status for the month.

Projects & Task: Project and task have separate line chart that shows the total active, completed and pending projects/tasks for the month. Also, it compares the numbers with previous month and show the progress in percentage wise.

Star Performer & User Evaluation: In this user report section admin get idea about the star performer user of the month and rated user of the month from 1 to 5 star rating.

Client Feedback: In this reporting section admin get project feedback received from the client side for the month. So organization gets overall rating for every project from client side.



All Members (Rating) Aug All

#	Name	Role	Avg
1	Gaurav Patel	Web Developer	5
2	Pradeep	Creative Designer	5
3	Sweta	CRM	4
4	Mehul M	Project manager	4
5	Sagar Soni	SMO	4
6	Nisha Shah	Accountant	4

Client Feedback Aug

Good	100%
Average	80%
Poor	0%

Total	4
Good	3
Avg	1
Poor	0

Team Evaluation:

For every completed project/task it have several parameters like, is this project completed on time?, If project/task have any delay, what is the reason?, Do each involved team member did great work?, Is client and team communication was nice? What is the manager's review on the project or task? Did your client appreciated the work and communication? This all factors will give you a clear picture of the project /task success in each organization. With Project Board you will get all together with easy team evaluations.

(Android)

Website

log

Content

ckaging Design

UI Design

Website

MOW Mobile app (Android)

Status

Completed in time

Start Date

Mar 25, 2017

End Date

Apr 6, 2017


Completion Date

Apr 6, 2017

Delay: N/A

Delay Reason: N/A

Project Members



Ankita Rana
Android Developer

Work Quality


★★★★★

Communication

★★★★★

Overall you did a great work, and in time.

Save



Arth Parikh
Web Developer

Work Quality

★★★★★

Communication

★★★★★

Arth, a nicely delivered all web services, great work together

Save

Client Feedback

Client feedback is pending.

Give your remarks (As a Administrator)

Remarks (Mandatory*)

Hello Team, This is fantastic project you done in time, well done team.

Submit

Files & Users


Users

Files


Links

Info


Search




Mehul Maheriya
Project Manager



Ankita Rana
Android Developer




Arth Parikh
Web Developer



Anurag Dixit
Client

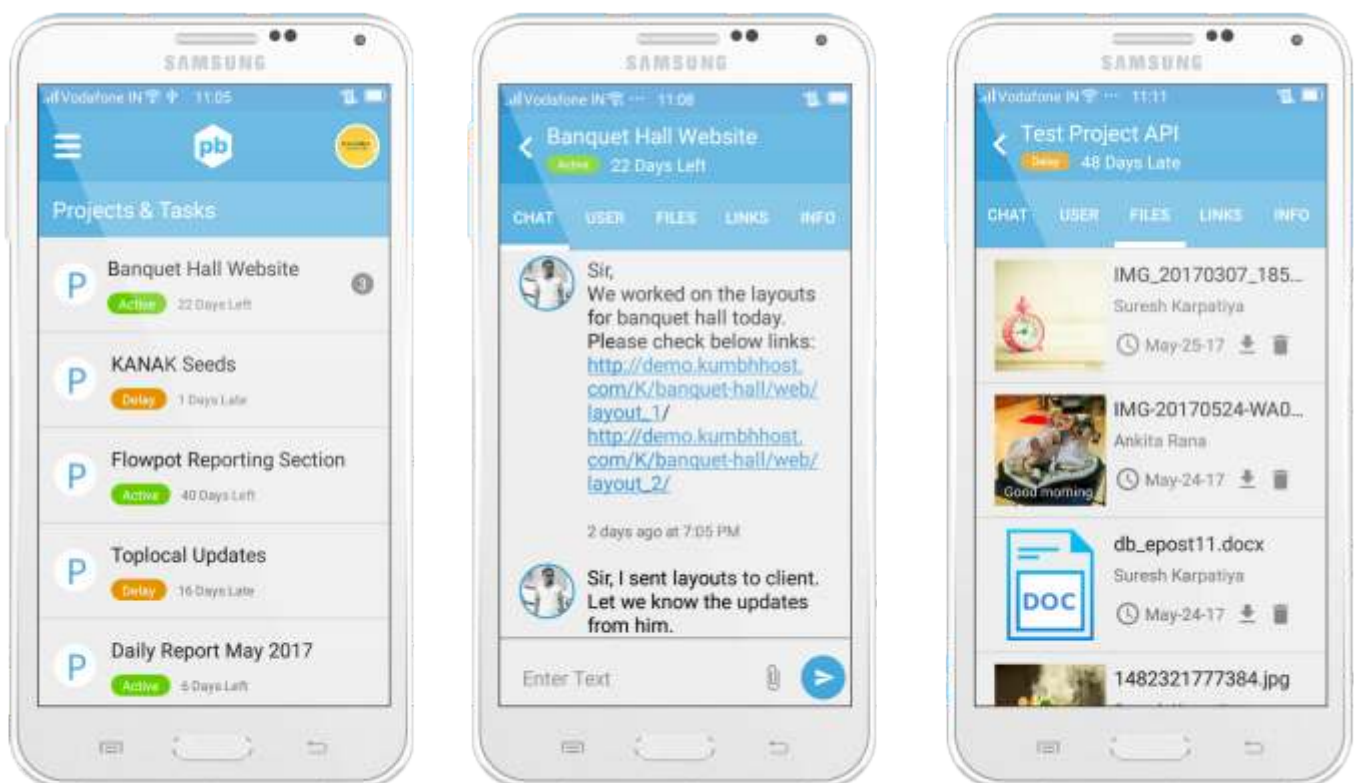
14

<https://www.flowpot.com/projectboard.html>

Powered by  Flowpot

On the Go:

Use android application to get on the go experience for all the features of the Project Board application. In the android app you can view all active and delay projects/tasks and will be able to communicate and share files easily. In user section you can also call to a user or client directly. In files and link section you will have all project/task related files and links to get quick access of the project / task.



<https://play.google.com/store/apps/details?id=com.kumbh.design.flowport&hl=en>

* Desktop and IOS Application coming soon

Security:

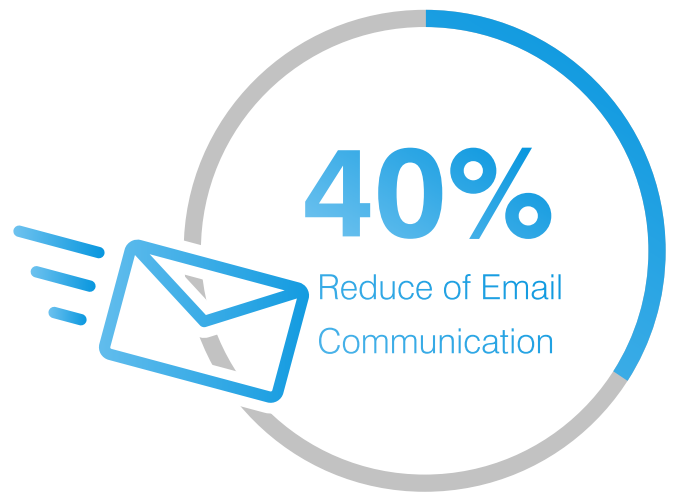
Your data is secure with Flowpot. We take care of industry standard guidelines for data and software code security. In the terms of Data Encryption, Messages and Profile Data Software Security, User Access

- Hosted in the cloud by 1and1 Web Server
- Data encryption using TLS 1.2
- Privacy of Project and Task messages and profile data
- Data access and user rights controls.



Beneficial and Faster

35 to 40% reduce of email communication in between the organization team and clients on daily project and task communication.



35 to 40% increase in team productivity. All project and task associate teams are on single page, so they take quick decision and work efficiently.

In each project and task, team evaluation is easy with communication, work quality and user performance.



Yes, This is best fit for almost all business team

Flowpot is fit for all business and industries from small to large team member with different role of works and management. It most fit for below list of business natures.

- ☒ IT & Software Development Companies
- ☒ Advertising Agency and Digital Media Agencies
- ☒ Event Management Companies,
- ☒ Pharmaceutical Companies,
- ☒ Construction Companies,
- ☒ Engineering Companies
- ☒ Doctors to Patients
- ☒ Management Companies
- ☒ Services Industries
- ☒ Freelancers and Blogger

Example 1

IT Services and Software Company

Congratulations to you Team! 😊

Car Android App Development

Congratulations to you Team! 😊

1 Days Left

Wow, that great, you are running before time!
Edwards Smith ⌚ Today at 2:08 PM

Edwards, refer below APK file, download it and run on your android phone, it is all done.
Phillips Johnson ⌚ Today at 1:52 PM

CAR-02.APK
3.17 MB

Phillips Johnson ⌚ Today at 1:51 PM

Hi Phillips, the final verison look nice, Stewart will definitely like it.
Richardson Jones ⌚ Today at 1:41 PM

Hello Phillips, testing app in my devise

Files & Users

Users Files Links Info Search

Edwards Smith
Project Manager

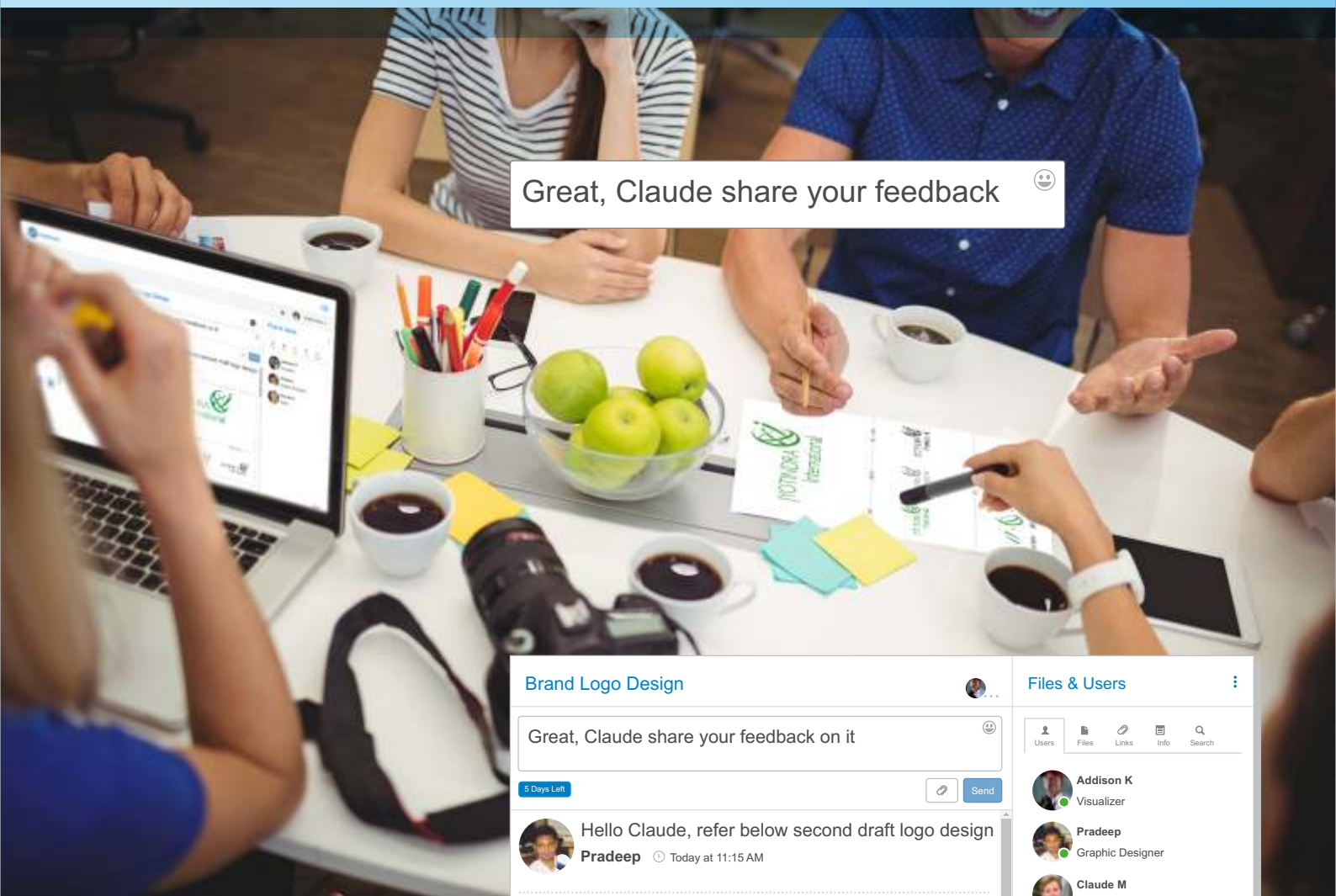
Phillips Johnson
App Developer

Richardson Jones
UI Designer

Stewart Williams
Client

Example 2

Advertising Agency / Digital Media Agency



Great, Claude share your feedback 😊

Brand Logo Design

Great, Claude share your feedback on it 😊

5 Days Left

Send

Hello Claude, refer below second draft logo design
Pradeep ⌚ Today at 11:15 AM

Pradeep ⌚ Today at 11:14 AM

Files & Users

- Users
- Files
- Links
- Info
- Search

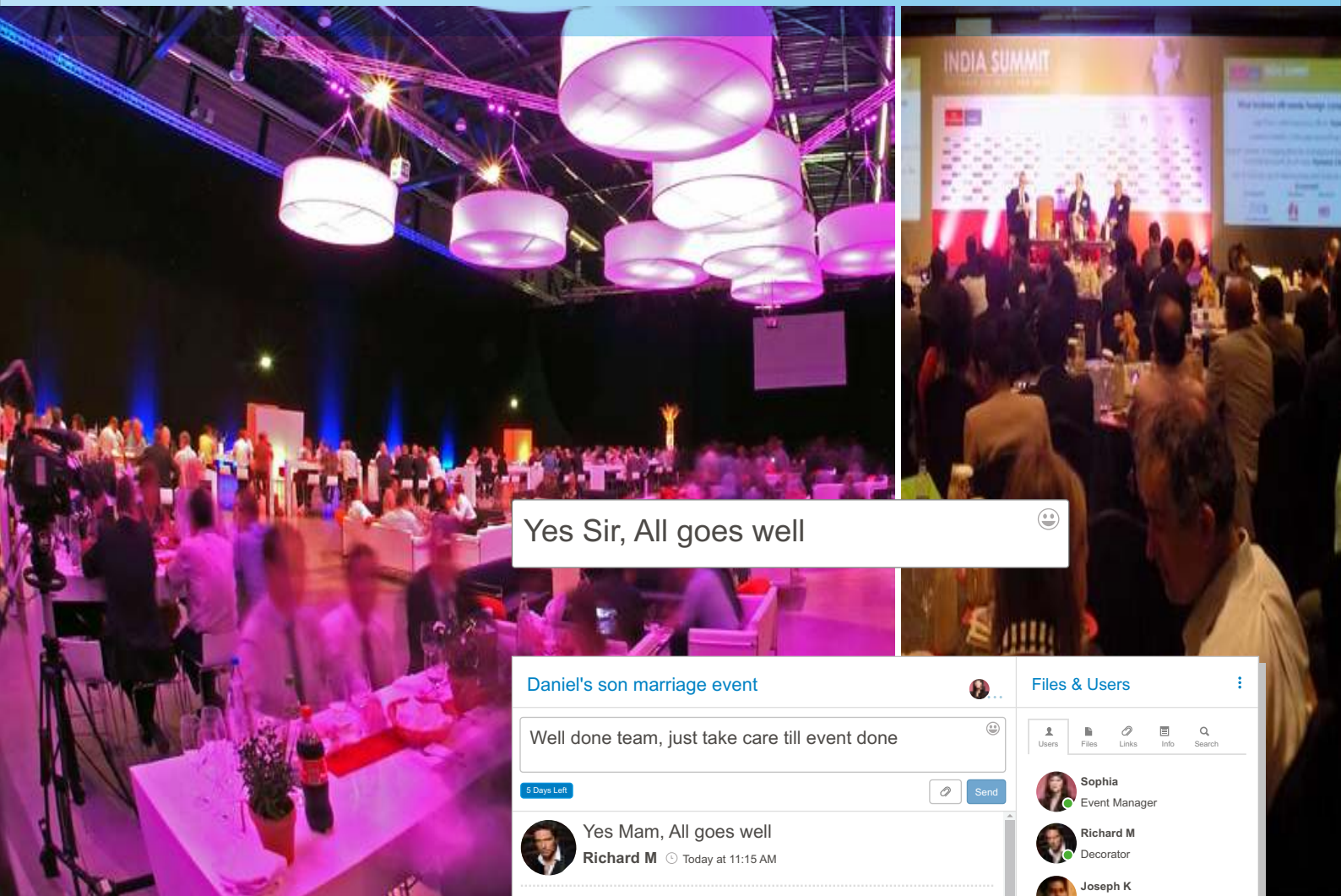
Addison K
Visualizer

Pradeep
Graphic Designer

Claude M
Client

Example 3

Event Management Company



Yes Sir, All goes well 😊

Daniel's son marriage event

Well done team, just take care till event done 😊

5 Days Left

Send



Yes Mam, All goes well
Richard M ⌚ Today at 11:15 AM



Joseph , make sure the all flower will reach in time
Richard M ⌚ Today at 11:10 AM



Sophia, I will reach before time with all items,
so don't worry about sweet part 😊
Thomas ⌚ Today at 10:55 AM



Okay Thomas, I appreciate 😊
Sophia ⌚ Today at 10:56 AM



Hi Sophia, your team works 🙌ery well
Daniel ⌚ Today at 10:10 AM

Files & Users

Users Files Links Info Search



Sophia
Event Manager



Richard M
Decorator



Joseph K
Florist



Thomas
Caterers



Daniel
Client

Pricing:

Simple Plans For Everyone

FREE	PRO PLAN	ENTERPRISE
<div>\$0</div> <div>Free to start with</div>	<div>\$3</div> <div>Per user per month</div>	<div>\$</div> <div>Ask for custom plan for large teams</div>
<div>Up to 20 Users</div> <div>Unlimited Project</div> <div>Unlimited Task</div> <div>File Sharing</div> <div>Project Invoicing</div> <div>Project History</div> <div>Reporting</div> <div>Support</div> <div>●</div> <div>●</div> <div>●</div> <div>●</div> <div>●</div> <div>●</div> <div>●</div> <div>●</div>	<div>Up to 100 Users</div> <div>Unlimited Project</div> <div>Unlimited Task</div> <div>File Sharing</div> <div>Project Invoicing</div> <div>Project History</div> <div>Reporting</div> <div>Quick Support</div> <div>●</div> <div>●</div> <div>●</div> <div>●</div> <div>●</div> <div>●</div> <div>●</div> <div>●</div>	<div>Email us for Enterprise use, for more than 100 user with the all features of Pro Plan</div>

Contact us

Feel free to use app in your organization, and contact us if you need any further help in same.



Coming soon

Flowpot

<https://www.flowpot.com/projectboard.html>

A-103/B, Ganesh Meridian, Opp. Kargil Petrol Pump, Nr. New Gujarat High Court, S.G. Highway,
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