RISE V3.5.3 - Ultimate Project Manager & CRM Free Download

RISE V3.5.3 - Ultimate Project Manager & CRM Free Download.. RISE v3.5.3 - Ultimate Project Manager & CRM is helpful for any kind of business to manage their work smartly. DemoDownload

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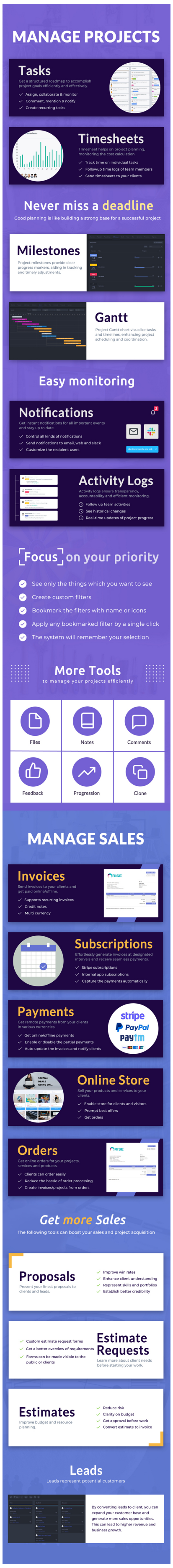
Description

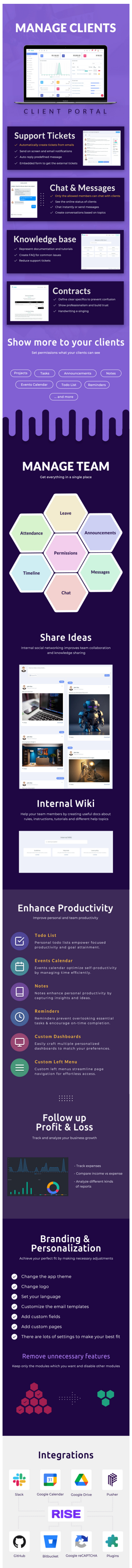
RISE V3.5.3 - Ultimate Project Manager & CRM Free Download

RISE v3.5.3 - Ultimate Project Manager & CRM is helpful for any kind of business to manage their work smartly. It can save your daily time to manage your clients, projects, sales and team members. It's optimized to improve customer satisfaction and work performance.

RISE has lots of essential features. Here are some key features which help our customers to success:

RISE is fast and easy to use. All UI designed to give you a quick navigation. You can download the full source code and install on your server. Customize it to meet your unique requirements. RISE is using the latest version of codeigniter 4. We are confident that RISE will exceed your expectations and help you achieve your goals.


MANAGE PROJECTS
Tasks
Timesheets
Never miss a deadline
Milestones
Gantt
Easy monitoring
Notifications
Activity Logs
Focus on your priority
See only the things which you want to see
Create custom filters
Bookmark the filters with name or icons
Apply any bookmarked filter by a single click
The system will remember your selection
More Tools
Files
Notes
Comments
Feedback
Progression
Clone
MANAGE SALES
Invoices
Subscriptions
Payments
stripe
PayPal
Paytm
Online Store
Orders
Get more Sales
Proposals
Estimate Requests
Estimates
Leads


MANAGE CLIENTS
CLIENT PORTAL
Support Tickets
Chat & Messages
Knowledge base
Contracts
Show more to your clients
MANAGE TEAM
Leave
Attendance
Announcements
Permissions
Timeline
Messages
Chat
Share Ideas
Internal Wiki
Enhance Productivity
Todo List
Events Calendar
Notes
Reminders
Custom Dashboards
Custom Left Menu
Follow up
Profit & Loss
Branding &
Personalization
Change the app theme
Change logo
Set your language
Customize the email templates
Add custom fields
Add custom pages
There are lots of settings to make your best fit
Remove unnecessary features
Integrations
Slack
Google Calendar
Google Drive
Pusher
RISE
GitHub
Bitbucket
Google reCAPTCHA
Plugins

Features Overview
Projects

RISE simplifies project management, streamlining your workflow for greater efficiency. With RISE, you can effortlessly oversee various team members’ tasks, accurately record time spent on each assignment, and generate comprehensive timesheets. Effortlessly invoice your clients and easily receive online payments for your projects.

Auto-calculated project progress to stay on top of your goals. Create and manage milestones to ensure timely project completion.

Engage in collaborative discussions with your team and gather valuable client feedback. Keep a keen eye on expenses with RISE’s expense tracking feature, making project management smoother than ever before.

Tasks

Enhance your task management experience by incorporating a range of powerful features:

Flexible task management

Manage tasks effortlessly using both list view and the intuitive Kanban view, allowing for drag-and-drop functionality. Add tasks in your projects or link with other features.

Team collaboration

Assign tasks to team members and extend your collaboration efforts by including multiple contributors.

Deadline management

Stay on top of your project’s timeline with the ability to set clear deadlines.

Status tracking

Monitor the progress of your tasks and projects through status updates and detailed activity logs.

Commenting and file attachments

Foster effective communication among team members with the option to comment on tasks and attach essential files.

Mention and notification system

Keep everyone in the loop by mentioning specific users in comments and receiving instant notifications for updates.

Priority highlighting

Pin important comments to ensure crucial information is easily accessible.

Version control integration

Seamlessly track code commits from platforms like GitHub or Bitbucket, simplifying your software development tasks.

Sub-tasks and dependencies

Break down complex tasks into smaller, manageable sub-tasks and establish task dependencies for structured project planning.

Checklist support

Enhance task details by incorporating checklists for comprehensive task management.

Comprehensive time tracking

Easily access and review time logs recorded by various team members for each task. Plus, effortlessly share these time logs with your clients to maintain transparency and ensure accurate billing.

Personalized reminders

Take control of your schedule by setting individual reminders for various tasks. Never miss an important follow-up or deadline, ensuring a proactive and organized approach to your work.

Clone tasks

Duplicate tasks with a simple click to swiftly generate new, similar tasks.

Recurring tasks

Automate recurring tasks using a cron job scheduler. If you find yourself tackling the same type of tasks at regular intervals, our system allows you to establish recurring tasks. Customize the time duration for each recurrence, ensuring tasks are created precisely when needed.

Smart filters

Craft custom filters that align with your unique needs and preferences, then conveniently bookmark them for one-click access. The system remembers your last selected filter, ensuring a seamless user experience. Filter and focus on the tasks that matter most, streamlining your workflow for optimal productivity.

Timesheets

Gain valuable insights into your team's time allocation across various projects and tasks. Easily filter timesheets by team members, projects, and clients. Customize timesheet sharing with clients on a per-project basis, allowing you to enable or disable this feature as needed.

Project milestones and Gantt chart

Enhance your project planning with the inclusion of project milestones. Within these milestones, you can break down tasks for a comprehensive day-to-day overview of your project's progress. Gain a clear and intuitive visualization of your project's completion timeline through the use of a Gantt chart.

Clients

Effortlessly handle your customers and their contacts. Register customers, add them manually, or import from Excel. Access comprehensive details on projects, tasks, invoices, payments, estimates, orders, contract details, proposals, tickets, notes, files, events, expenses, and more. Simplify monitoring by categorizing customers with client groups and labels.

Client portal

Empower your clients with the client portal, where each one enjoys a personalized dashboard to view their projects, invoices, proposals, orders, tickets, and more. Your clients can seamlessly track project progress and provide instant feedback. Customize permissions to control client access, ensuring they can communicate with authorized team members exclusively.

Invoices

Create polished, visually appealing invoices, complete with file attachments, and seamlessly deliver them to your clients, including the PDF invoice file. Get a CC copy of the sent invoices. Clients can conveniently make payments, whether or not they have a RISE account.

Customize invoices with various currencies to accommodate diverse clients and handle both tax and non-taxable items effortlessly.

Gain insight into your financials with an intuitive invoice summary report, offering a comprehensive overview by year, month, or customer.

Credit notes

Generate credit notes for any adjustments or amendments to your previously issued invoices.

Recurring invoices

Set up automated recurring invoices, ensuring timely billing and delivery to your customers at predefined intervals. Save your valuable time by automating the invoicing process, effortlessly sending invoices to your clients.

Online payments

Accept payments in various currencies while ensuring your customers receive automated payment notifications and have their invoices promptly marked as paid. RISE offers versatile online payment options through Stripe, PayPal, and Paytm, with the flexibility to enable or disable partial payments based on your needs.

Subscriptions

Accelerate your billing process with Stripe subscriptions through RISE. Easily generate Stripe subscriptions and share them with your customers. Once they accept, payments will be automatically processed according to the subscription period. RISE will generate invoices seamlessly for the subscriptions.

We support both internal app subscriptions and Stripe subscriptions.If you don't use the Stripe subscriptions, you can still use the internal app subscriptions.

Estimates

Effortlessly generate estimates and share them with your customers. Once they approve, you can convert the estimate into an invoice. Your clients can access estimates without needing to log in. Enhance client communication through the estimate comments to facilitate more effective negotiations. Additionally, optimize your follow-up process by setting timely reminders.

Estimate requests

Generate forms with tailored, predefined questions and enable your clients to submit these forms for more accurate estimations. This can help you secure additional projects and increase sales.

Proposals

Craft visually stunning proposals that leave a lasting impression on your clients. Stay informed with real-time notifications for important proposal events.

Online store and orders

Enable the online store for both your clients and visitors, allowing users to browse and place orders for items in the store. This facilitates the effortless sale of your services.

Support tickets

Empower your clients to initiate support tickets and receive timely notifications via web and email. RISE seamlessly auto-generates tickets from customer emails, facilitating efficient issue tracking and resolution. Allow customer engagement even without a RISE login.

Assign tickets to team members and respond to comments with attachments for comprehensive support. Insert predefined templates for quick reply, refer knowledge base links, add internal notes.

Utilize visual ticket chart reports to enhance your follow-up process and gain a clearer understanding of your ticket management.

Knowledge base

By creating a comprehensive knowledge base, you provide your clients with the tools they need to resolve their issues efficiently, ultimately improving their support experience.

Develop informative knowledge base articles for your clients, empowering them to find solutions to their inquiries independently.

Organize articles into distinct categories, making it easier for customers to pinpoint the information they need, thereby reducing the need for direct support.

Chat and Messages

With RISE, you can engage in both chat and messaging with your clients and team members, all within a unified platform. Simplify communication and enhance collaboration for improved teamwork.

Contracts

Forge strong client contracts for your projects and other engagements, maintaining a steadfast commitment to trustworthy and transparent work.

The contracts serve as a foundation for reliable and transparent collaboration. By meticulously detailing expectations, deliverables, and terms, you build trust with your clients, setting the stage for a successful and open working relationship.

E-signing

Clients can effortlessly e-sign their contracts, proposals, and estimates during the acceptance process, enhancing transparency in your work with your clients.

Leads

Easily add and track leads, organizing them intuitively through drag-and-drop in kanban view. Import leads via Excel or auto-collect from external websites. Enhance lead details with notes, files, events, and the ability to send proposals, estimates, and contracts.Smoothly convert leads into clients to streamline your business processes.

Expenses

Efficiently manage your expenses with comprehensive tracking, including detailed project and team member cost insights. Analyze expenses across various categories and compare income versus expenditures effortlessly. Visualize your income and expenses through easy-to-read charts across different time periods. Plus, simplify your workflow by setting up recurring expenses for automated fixed expenses.

Events calendar

Manage your personal events or collaborate by sharing them with your team members and clients. Gain visibility into your project and tasks within the event calendar and receive on-screen event notifications to stay prepared before the event begins.

Seamlessly integrate with Google Calendar for synchronization and keep track of upcoming events conveniently from your dashboard. Create recurring events to easily maintain specific events after a certain time period.

Custom dashboards

Recognizing that everyone has unique needs and preferences, RISE provides top-notch dashboard management that offers a user-friendly setup for creating stunning widgets through simple drag-and-drop actions. You can craft multiple dashboards, and the system will intelligently remember your last visited dashboard for your convenience on your subsequent visit.

Additionally, you have the flexibility to create a default dashboard for all team members, and individuals can also add their personal dashboards to cater to their specific requirements.

Personal todo list

Create your personal todo list and manage your work more efficiently. Don’t forget to do any important task and stay focused on daily work. Each team member and client can add their personal todo list.

Notes

In RISE, you can create personal notes to consolidate vital information in one central location. Collaboratively share these notes with project members to ensure critical information is readily accessible to the team.

Reminders

Establish reminders with varying contexts to facilitate more effective follow-ups. Ensure you never overlook important tasks and remain consistently informed and up-to-date.

Custom fields

Enhance flexibility by adding custom fields to clients, contacts, leads, projects, tasks, team members, tickets, invoices, events, expenses, estimates, contracts, proposals, orders, timesheets, project files, and subscriptions, tailoring your information storage to your specific needs.

Efficiently manage access permissions by assigning different privileges to various fields. Organize field placement effortlessly through a drag-and-drop interface for maximum customization.

Custom left menu

Tailor your experience by easily reorganizing the left menu according to your preferences through a simple drag-and-drop feature. Customize the global left menu to suit the unique needs of either your team members or clients, granting flexibility in navigation. Users have the freedom to personalize their individual left menus for a truly tailored user interface.

Change theme

There are a variety of predefined theme colors at your fingertips, just a single click away. And if you prefer a darker aesthetic, we offer a dark theme as well. For those looking to align the design perfectly with their brand, you can also harness the power of custom CSS for further customization.

Email templates

Customize your email templates to align seamlessly with your brand, delivering an enhanced and cohesive experience to your clients. We offer the option to incorporate templates in multiple languages, ensuring effective communication with a diverse audience.

Teams

Create different teams and add your team members. Seamlessly distribute events and notifications to designated teams. Customize permissions for each team according to your specific needs.

Leave and Attendance

Effortlessly oversee your team members’ leave applications and time cards. Receive instant notifications regarding leave requests and make efficient decisions to approve or reject them. Team members can easily clock in and out to record their daily work hours.

Roles and permissions

Take full control over the access permissions of your team members. Tailor roles and permissions to each team member, granting you the ability to manage their visibility and creation privileges in various contexts.

Internal wiki

Establish an internal wiki to enhance team knowledge and information sharing. Create an exclusive internal knowledge base for your team members, offering a repository of articles covering various rules and essential information.

Announcements

Share essential messages and updates with your clients and team members to keep everyone informed about upcoming events, holidays, and celebrations.

Timeline

Team members have the opportunity to share their ideas and knowledge with colleagues, and this can contribute to improving their knowledge base and fostering productive learning.

Reports

Easily access a variety of insightful reports to gain a comprehensive overview of your business operations. With sales summary reports presented in both list and chart views.

You can efficiently assess income and expenses across different time periods. Dive into timesheets to track the efforts of individual team members, projects, and clients. Additionally, explore team members' project summaries, review the total number of projects per client, and analyze total timelog hours.

For a deeper understanding of your business performance, compare lead conversion rates from different sources and team members, while also tracking daily progress throughout the month. Monitor ticket openings and closures through time period-specific charts, ensuring you stay well-informed about all aspects of your operations.

Notifications

Managing notifications has never been more straightforward. Take charge of all your notifications and determine who receives specific alerts. Enable notifications for web, email, and Slack to stay up to date.

GDPR

Enable GDPR to comply with General Data Protection Regulation.

Multilingual

RISE is designed to be multilingual, offering both default languages and the flexibility to add your own. It also provides support for RTL layout.

Responsive

RISE is fully responsive, enabling you to access it effortlessly from your mobile devices and offering a user-friendly experience.

Google Drive

Integrate with the Google Drive, ensuring that all uploaded files are stored on Google Drive rather than consuming your server space.

Google reCaptcha

Enhance your security measures by adding an additional layer of protection to thwart unwanted login and sign-up attempts. Easily fortify your system by seamlessly integrating Google reCaptcha.

Push notifications

Activate browser push notifications by integrating with Pusher. Receive instant notifications for various actions, keeping you up-to-date in real-time.

Pages

Incorporate custom pages to display supplementary information. Designate any custom page as your landing page for a tailored user experience.

File manager

It’s never been simpler to manage files. Organize your files easily by creating custom folders. Set different permissions and share them with your team members. Available in the client portal as well.

Updates

Effortlessly install new updates with a single click. Just navigate to the Settings > App Settings > Updates page to stay up-to-date with the latest releases.

Plugins

Develop your custom features by the powerful plugins feature. Explore the available third-party plugins created by other authors right here. To build and sell your own plugins, please check this.

Automations

Using the automation system in the tickets, prevent unwanted ticket creation and assign specific tickets to the preferred team member. Set ticket type and labels based on your ticket content.

PWA

Install the RISE PWA on your mobile and use it without any extra cost.