CRM Module – Changes & Enhancements

1. Campaign Module

- **Campaign Creation Inputs:**
  - Campaign Name
  - Campaign Type
  - Channel
- **System Actions:**
  - Auto-generates a unique campaign link.
  - Clicking the link → opens a lead capture form (fields: Name, Email, Mobile, Source, Campaign ID).
  - Captured leads enter **Prospect Queue** (not CRM).
- **Prospect Handling:**
  - Agents call prospects → record outcomes via dropdown:
    - Not Interested
    - Not Reachable
    - Wrong Number
    - Interested
  - If *Interested* → promote to CRM (Direct/Corporate/Investor flow).
  - If *Not Interested* → remain in Prospect Module with outcome reason.

2. Prospect Module

- When promoted to **Direct Leads** → open lead details screen with all information
- Add **Bulk Upload** feature.

3. CRM Module

- Remove one **Assigned To** in *Create New Leads*.
- CRM Home → use **separate boxes per module** (like *Compliance Overview*).
- In **All Leads**:
    - Add filter **Assigned To** as a dropdown.
    - Add **Closed** in lead status.
    - Show a box with **count of Closed Leads** on CRM Dashboard.
- From *Create Lead Form* → all information must display in each Lead Entry (currently missing fields).
- **Document Upload:** Ensure **image upload works** in each lead.
- **Additional Information Section:** Add a **Save** button at bottom.
- **Action Items:** Add as a **separate page** in CRM.
- **Access Control:**
    - **Admin** → view all information.
    - **Client Management Team** → only view **assigned leads**.

4. Partner Module

- In **Add New Partner**:
    - Remove **Service Type**.
    - Add **Partner Type** (dropdown → *Leads Provider*, *Service Provider*).
    - If **Lead Provider** → system generates a single **Form Link** (no separate equity/grants forms).
    - If **Service Provider** → ask services they provide (input field).
- In **Partner Generated Form**:
    - Remove **Assigned To**.
    - Remove **Source** (auto from Partner).
- **Partner Login:**
    - Show only Dashboard of Leads + Lead Status + Form Link.
- **Partner Onboarding:** Add **Bulk Upload** option.

5. Lead Management

- **Validation:**
    - Mobile number validation at input itself (button beside field).
    - No post-submission validation.
- **Assigned To:** In all places, must be a **dropdown**.
- **Founder Details:** Founder’s name & details must be visible in all Lead Entries.

6. Roles & Access

- **Admin:** Access to everything.
- **Client Management Team:** Only assigned leads visible.
- **Partners:** Dashboard (Leads + Status + Form Link) only.