



Welcome to the Code challenge! We hope you enjoy solving it.

Role : Full Stack Developer (Python) - Business Operations Team

Guidelines :

- Go through the Leads Assignment Sheet CSV file
- Code using Python
- Use any SQL database you are comfortable with as backend to store values from CSV into Leads table(Postgres,MYSQL,SQLite, etc
- Feel free to use any python libraries to get to optimal solution
- The resulting report can be submitted as tables or graphs via HTML Page Or PDF
- You can use Flask, Django or any other Python framework to accomplish the task
- **How to Submit ?** Submit the code via Github, host the application on Heroku or any online platform or provide detailed instructions on how to test the code as part of the README.md of the repository.
- Deadline to submit - **Sunday, 9th october EOD**

Problem Statement :

Business Development Report

Company ABC Fintech Private Limited wants to devise a sales strategy to increase conversion of potential leads(prospects) into clients. The Chief Sales Officer has reached out to you, to build a Business Development Report using the csv file provided by the Sales Team. With the help of Technical Project Manager he has come up with below requirements, you need to go through the requirements and come up with the best possible solution.

Requirements:

- Store the csv data from the csv file into a Table in SQL database
- ID will be the primary key
- Once the data from CSV is loaded into the database, you need represent the data as a report on an HTML page(If you want to represent the report as a PDF file instead of HTML you can do the same)
- Questions or Sections in the report have to be submitted in the format mentioned in the below sections.

Additional information:

- Churned: The lead has been closed due to lack of interest from the client, closed_at date will be mentioned
- Signed: The lead has signed up for the product, signed_at date will be mentioned
- Active: The lead is active and Sales Team is communicating with client on regular basis

Content Of The Report:

1. Number of Leads signed till September 2022, use signed_at column to get information on the signed date?(Format mentioned below in Section 1.1)
2. List signed Leads till September 2022, use signed_at column to get information on the signed date? (Format mentioned below in Section 1.2)
3. Show the percentage of leads that are In Active vs Churned vs Signed status?(Format mentioned below in Section 1.3)
4. Show percentage of leads in respective stages? Prospect, Discussion, Contracting, Payment, Proposal (Format mentioned below in Section 1.4)
5. Forecast Revenue: Income with potential leads? Potential leads are the leads in contracting or proposal stage and status not in standby or churned (Format mentioned below in Section 1.5)
6. Potential Lost Revenue: Income lost due closed lead? (Format mentioned below in Section 1.6)

**** All data mentioned in the below section is just for design reference, please use the data from the CSV to get the actual values.**

Section 1.1 : Display Number Of Leads Signed Till September 2022

Sample :

Number Of Leads Signed Till September 2022
10

Section 1.2 : Display Lead Signed Till September 2022

Sample:

Lead Signed Till September 2022
Himanshu Joshi Globe Capital Market
Gibin Jose Jojoba Investments
.
.

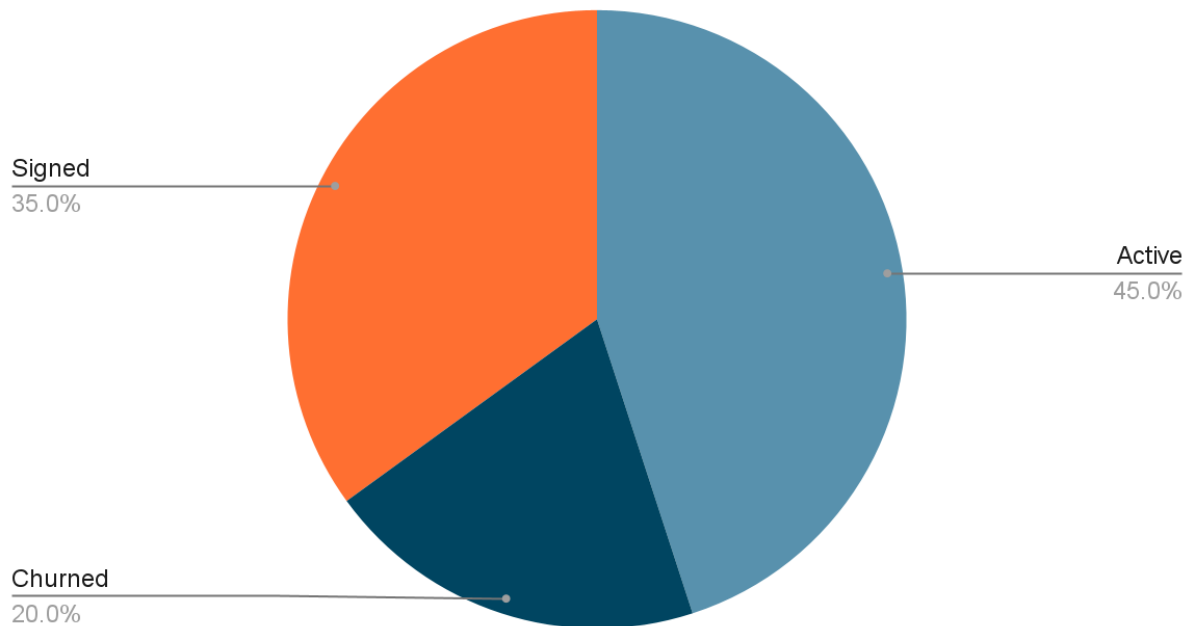
Section 1.3 : Display Lead Status Report

Sample:

Status	Percentage
Active	45%
Churned	20%
Signed	35%

****Bonus Points if you can represent the numbers as Pie Chart**

Points scored



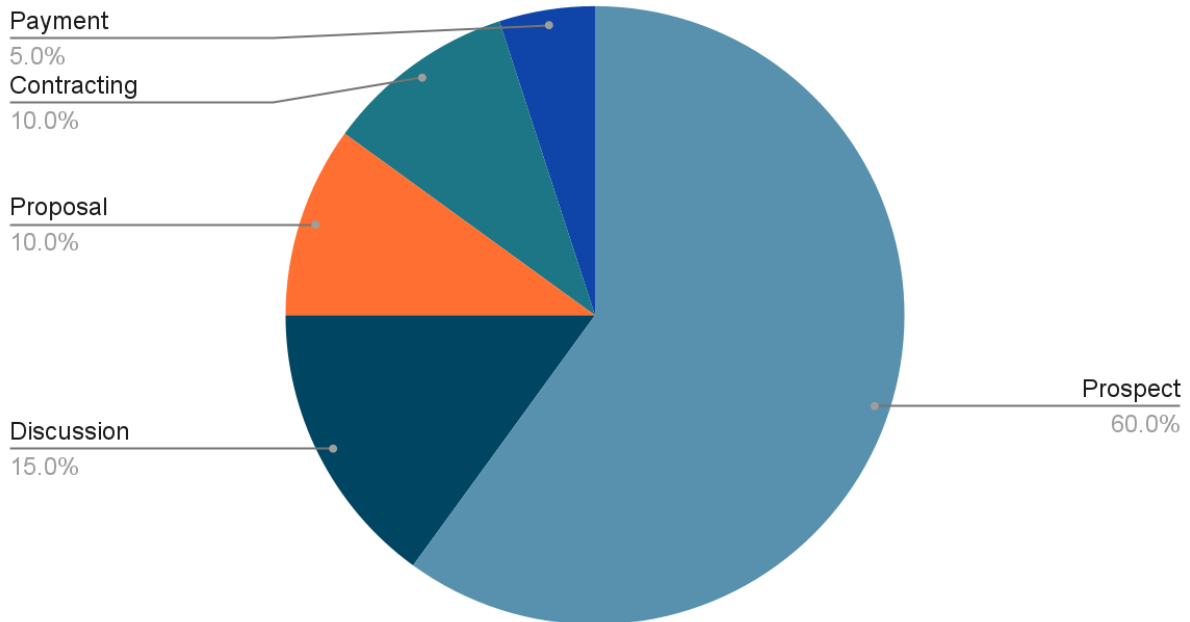
Section 1.4 : Display Lead Stage Report

Sample :

Stage	Percentage
Prospect	60%
Discussion	15%
Proposal	10%
Contracting	10%
Payment	5%

****Bonus Points if you can represent the numbers as Pie Chart**

Points scored



Section 1.5 : Display Forecast Revenue

Sample :

Lead	Stage	Annual Revenue(Amount * 12)
Raghava Coinbox	Contracting	60,00,000
Micah Mera Cal	Proposal	1,20,00,000
Pulkit Agrawal Wealth Tech	Contracting	36,00,000
Debabrata Sengupta Konfinvest LLP	Proposal	12,00,000
Praveen Kumar Dwivedi Nivesh Finserve	Contracting	1,08,00,000
Total		3,36,00,000

Section 1.6 : Display Potential Lost Revenue

Sample:

Lead	Annual Revenue Lost (Amount * 12)
Ashish Shukla AOD	12,00,000
Achint Ahluwalia PintBox	48,00,000
Anuj Jain Kaj Fincare	12,00,000
Total	72,00,000