Project Document

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CRM Application

Overview
- The CRM Application is a web-based system designed to manage interactions with current and potential customers. It aims to streamline sales, marketing, and customer service processes.

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Getting Started

Prerequisites
- Node.js >= 14.x
- npm >= 6.x
- MongoDB >= 4.x

Installation
```bash
# Clone the repository
git clone https://github.com/yourusername/crm-application.git

# Navigate to the project directory
cd crm-application

# Install dependencies
npm install
```

Usage
```bash
# Start the server
npm start
```

API Reference

Customers Endpoint

Description
- This endpoint is used to manage customer data.

Request
- **Method**: `GET`
- **URL**: `/api/customers`

Query Parameters
- `search`: Search by customer name or email

Response
```json
{
  "id": 1,
  "name": "John Doe",
  "email": "johndoe@example.com",
  "phone": "123-456-7890"
}
```

Leads Endpoint

Description
- This endpoint is used to manage potential customers (leads).

Request
- **Method**: `GET`
- **URL**: `/api/leads`

Query Parameters

- `status`: Filter by lead status (e.g., new, contacted)

Response
```json
{
  "id": 1,
  "name": "Jane Smith",
  "email": "janesmith@example.com",
  "status": "new"
}
```

Tasks Endpoint

Description
- This endpoint is used to manage tasks related to customers and leads.

Request
- **Method**: `POST`
- **URL**: `/api/tasks`

Body Parameters
- `customerId`: ID of the customer
- `leadId`: ID of the lead
- `description`: Task description
- `dueDate`: Due date for the task

Response
```json
{
  "id": 1,
  "customerId": 1,
  "leadId": null,
  "description": "Follow up with John Doe",
  "dueDate": "2024-04-10"
}
```

Contributing
- Fork the project
- Create your feature branch (`git checkout -b feature/your-feature`)
- Commit your changes (`git commit -am 'Add some feature'`)

- Push to the branch (`git push origin feature/your-feature`)
- Create a new Pull Request

License
- This project is licensed under the MIT License - see the LICENSE.md file for details.
CRM Application

Overview
- The CRM Application is a web-based system designed to manage interactions with current and potential customers. It aims to streamline sales, marketing, and customer service processes. The system provides a centralized platform for storing customer data, tracking leads, managing tasks, and analyzing customer interactions to improve business relationships and drive sales growth.

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```
# Install dependencies
npm install
```

Usage
```bash
# Start the server
npm start
```

API Reference

Customers Endpoint

Description
- This endpoint is used to manage customer data. It allows users to create, read, update, and delete customer records.

Request
- **Method**: `GET`
- **URL**: `/api/customers`

Query Parameters
- `search`: Search by customer name or email

Response
```json
{
  "id": 1,
  "name": "John Doe",
  "email": "johndoe@example.com",
  "phone": "123-456-7890"
}
```

Leads Endpoint

Description
- This endpoint is used to manage potential customers (leads). It enables users to track and manage leads through various stages of the sales pipeline.

Request
- **Method**: `GET`
- **URL**: `/api/leads`

Query Parameters
- `status`: Filter by lead status (e.g., new, contacted)

Response
```json
{
  "id": 1,
  "name": "Jane Smith",
  "email": "janesmith@example.com",
  "status": "new"
}
```

Tasks Endpoint

Description
- This endpoint is used to manage tasks related to customers and leads. It allows users to create, assign, and track tasks to ensure timely follow-ups and effective communication.

Request
- **Method**: `POST`
- **URL**: `/api/tasks`

Body Parameters
- `customerId`: ID of the customer
- `leadId`: ID of the lead
- `description`: Task description
- `dueDate`: Due date for the task

Response
```json
{
  "id": 1,
  "customerId": 1,
  "leadId": null,
  "description": "Follow up with John Doe",
  "dueDate": "2024-04-10"
}
```

```

---

## Contributing
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## Detailed Description

### Features

#### Customer Management
- The CRM application allows users to manage customer information, including contact details, purchase history, and interactions. Users can easily add new customers, update existing records, and view a comprehensive customer profile.

#### Lead Tracking
- The system provides a lead tracking feature to help sales teams manage potential customers through the sales pipeline. Users can categorize leads based on their status (e.g., new, contacted, qualified) and set reminders for follow-ups.

#### Task Management
- The CRM application includes a task management module that enables users to create, assign, and track tasks related to customers and leads. This feature ensures timely follow-ups, effective communication, and better organization of tasks.

#### Reporting and Analytics
- The system offers built-in reporting and analytics tools to help businesses gain insights into customer behavior, sales performance, and marketing effectiveness. Users can generate various reports, such as sales forecasts, customer segmentation, and campaign ROI analysis, to make informed business decisions.

#### User Roles and Permissions
- The CRM application supports multiple user roles (e.g., admin, sales representative, marketing manager) with customizable permissions. This allows businesses to control access to sensitive information and functionalities based on each user's role and responsibilities.
```

Technology Stack

- **Backend**: Node.js, Express.js
- **Database**: MongoDB
- **Frontend**: React.js, Angular.js (optional)
- **Authentication**: JSON Web Tokens (JWT)

Security

- The CRM application prioritizes data security and privacy. It implements industry-standard security measures, such as encryption, HTTPS, and authentication, to protect sensitive customer data and ensure compliance with data protection regulations.

Scalability

- The system is designed to be scalable and can handle a large volume of customer data, leads, and transactions. It leverages a microservices architecture and cloud infrastructure to ensure high performance and availability.