**CRM Front-End Homepage Documentation for UI/UX Designer**

**Overview**

This document outlines the functionality and expected behaviour of the homepage for a new CRM front-end designed for Business Development Managers (BDMs) to manage leads. The goal is to create a user-friendly interface that improves upon the existing ERP system by making relevant fields and actions easily accessible. The homepage serves as the central hub for BDMs to view tasks, track leads, access reports, monitor performance metrics, and perform key actions. The position of elements on the page is flexible and can be finalized during the design phase, but all specified components must be present. This document details each component’s purpose, and the operations triggered when interacted with, providing a foundation for the UI/UX design.

**Homepage Components and Operations**

**1. Search Bar**

* **Purpose**: Allows BDMs to dynamically search for leads using various fields without manually selecting field types.
* **Functionality**:
  + The search bar supports dynamic, real-time matching of input against multiple lead fields (e.g., leadID, phone number, email, name, company name).
  + As the BDM types, the system suggests results based on partial matches across all relevant fields, eliminating the need to specify the field type (unlike the current ERP system).
  + Results are displayed in a dropdown or list below the search bar, showing key lead details (e.g., name, company, contact info).
  + Clicking a result redirects the BDM to the lead’s detailed profile page for further actions.
* **Expected Behaviour**:
  + The search is fast and responsive, with results updating as the user types.
  + The system highlights the matched field in the results for clarity (e.g., “John Doe - Name” or “john.doe@email.com - Email”).
  + If no matches are found, a “No results” message is displayed.

**2. Notification Icon**

* **Location**: Top right of the homepage.
* **Purpose**: Alerts BDMs to new tasks or updates, specifically visits assigned by the pre-sales team, new layouts received and missed follow ups
* **Functionality**:
  + Displays a badge or counter indicating the number of unread notifications.
  + Clicking the icon opens a dropdown or panel listing notifications, each including details like the visit’s date, time, lead name, and purpose.
  + Selecting a notification redirects the BDM to the relevant lead or task page for action (e.g., scheduling or preparing for the visit).
  + Notifications are marked as read once viewed or actioned.
* **Expected Behaviour**:
  + Unread notifications trigger a visual cue (e.g., red badge with a number).
  + The dropdown is dismissible and prioritizes recent notifications.
  + Notifications remain accessible until actioned or manually cleared.

**3. Today’s Tasks**

* **Purpose**: Displays a list of tasks the BDM must complete today, highlighting urgent or pending actions.
* **Functionality**:
  + Lists tasks such as:
    - **Follow ups**: Follow-up calls scheduled for today.
      * **Scheduled follow ups**
      * **Missed follow ups**
      * **Pending proposals**
      * **Realtor follow ups**
    - **Scheduled visits**: List of leads expected to visit (either by pre sales or self generated visits)
    - **Pending Layout**: Layout requests needing review or submission.
    - **Rental Escalations**: Rental escalations due for the current and upcoming month and the current month.
  + Each task includes key details (e.g., lead name, task type, due time).
  + Tasks with pending actions are marked with a **red blinking dot** to draw attention.
  + Clicking a task redirects to the relevant lead list page for action (e.g., initiating a call, requesting a layout, etc).
* **Expected Behaviour**:
  + Tasks are sorted by urgency or due time, with pending actions at the top.
  + The red blinking dot is a subtle but noticeable animation.
  + The list is scrollable if there are many tasks, with a clear indication of completion status.

**4. Sales Funnel**

* **Purpose**: Visualizes the BDM’s lead pipeline, showing the number of leads at each stage.
* **Functionality**:
  + Displays the following stages with lead counts:
    - **Total Assigned Leads**: All leads assigned to the BDM.
    - **Prospect Leads**: Leads in initial contact or qualification.
    - **Layout/Proposal**: Leads awaiting layout or proposal submission.
    - **Token Received**: Leads with confirmed token payments.
    - **Deposit Received**: Leads with deposits paid.
    - **SA**: Leads in the Sales agreement documentation stage.
    - **Clients**: Converted leads (closed deals).
  + Clicking a stage redirects to a filtered list of leads in that stage, allowing the BDM to view details or take actions.
* **Expected Behaviour**:
  + The funnel is presented as a summary (e.g., numbers or a compact chart).
  + Lead counts update in real-time as leads progress.
  + The interface is intuitive, with clear labels for each stage.

**5. Reports**

* **Purpose**: Provides quick access to key reports relevant to the BDM’s performance and tasks.
* **Functionality**:
  + Lists the following reports:
    - **Daily Productivity Report**: Summarizes the BDM’s daily activities (e.g., calls, visits, conversions).
    - **Missed Call Report**: Details missed calls requiring follow-up.
    - **Lost Prospects Validation Report**: Analyses prospects that didn’t convert and reasons why.
    - **Follow-Up Validation**: Tracks follow-up completion rates and outcomes.
    - **Rental Escalation Missed Report**: Highlights missed rental escalation actions.
  + Clicking a report name redirects to a detailed report page with filters, charts, or tables specific to that report.
* **Expected Behaviour**:
  + Reports are listed as clickable tiles or links.
  + The section is compact but clearly labelled for easy identification.

**6. Performance Metrics**

* **Purpose**: Displays key performance indicators (KPIs) for the BDM, with customizable date ranges.
* **Functionality**:
  + Shows the following metrics:
    - **Missed Follow-Ups Count**: Number of overdue follow-ups.
    - **Visits Taken**: Total client visits conducted.
    - **Visit to Client Conversion Ratio**: Percentage of visits resulting in conversions.
    - **Number of Clients Converted**: Total clients closed.
  + Includes a dropdown or selector to filter metrics by date range: Daily, Weekly, Monthly, or Quarterly.
  + Clicking a metric may display a detailed breakdown or trend graph (optional, based on design).
* **Expected Behaviour**:
  + Metrics update dynamically when the date range is changed.
  + Values are displayed clearly, with units or percentages as applicable.
  + The interface is responsive to different screen sizes.

**7. Recently Actioned Leads**

* **Purpose**: Allows quick access to leads recently interacted with by the BDM.
* **Functionality**:
  + Displays a list of recently actioned leads (e.g., last 5–10 leads updated, called, or visited).
  + Each entry includes key details (e.g., lead name, company, last action, date/time).
  + Clicking a lead redirects to its detailed profile page for further actions.
* **Expected Behaviour**:
  + The list is sorted by most recent action, with a maximum number of entries to avoid clutter.
  + Entries are concise but informative, with clear differentiation between leads.
  + The list updates dynamically as new actions are taken.

**Additional Notes**

* **User Experience Goals**:
  + The homepage should feel intuitive, with minimal clicks to access key actions or information.
  + Visual hierarchy is critical to prioritize urgent tasks (e.g., red blinking dots) and frequently used features (e.g., search bar, quick access toolbar).
  + The design should accommodate varying screen sizes, ensuring responsiveness for desktop and mobile use.
* **Flexibility for Design**:
  + The layout and positioning of components can be adjusted during the design phase to optimize usability.
  + Collaborate with the development team to ensure dynamic features (e.g., search, notifications) are technically feasible.

**Leads List Documentation for ERP System**

**1. Follow Ups Tab**

* **Purpose**: Displays a list of leads scheduled for follow-ups by the BDM (Business Development Manager).
* **List View Details**:
  + **Lead ID**: Unique identifier for the lead.
  + **Company Name/Customer Name**: Displays either the company name or customer name, whichever is available.
  + **Scheduled Follow-Up Date**: The date of the scheduled follow-up.
  + **Time (if specified)**: If the customer has specified a time, it is displayed; otherwise, only the date is shown.
* **Sorting Logic**:
  + Leads with a specified time for the follow-up call are prioritized and appear at the top of the list.
  + Leads with only a date (no time specified) are listed below, sorted by date in ascending order.

**2. Scheduled Visits Tab**

* **Purpose**: Displays a list of leads scheduled for visits by the pre-sales team, with options for the BDM to claim and confirm visits.
* **List View Details**:
  + **Lead ID**: Unique identifier for the lead.
  + **Company Name/Customer Name**: Displays either the company name or customer name, whichever is available.
  + **Property Name**: The name of the property associated with the visit.
  + **Date and Time of Visit**: The scheduled date and time for the visit.
* **Functionality**:
  + **Claim Visit**: The BDM can click a "Claim" button to indicate they are available and responsible for the visit. This assigns the visit to the BDM.
  + **Confirm Visit**: After the visit, the BDM must click a "Confirm" button to:
    - Assign the lead to their name.
    - Automatically update the lead's property name and date of visit in the post visit table (no further action required from the BDM for this step). Adds a row to the **Post Visit Table** with details of the visit
    - Display a pop-up for the BDM to update the visit description, the updates will be saved in the comments section.
  + **Add New Lead**: If a lead revisits the property, the BDM can update or add a new lead directly from this page using a "New Visit" button and filling the necessary details.
    - **LeadID**
    - Date of visit
    - Property name
    - Visit description

**3. Rental Escalation Tab**

* **Purpose**: Displays a list of leads pending rental escalation, requiring action from the BDM.
* **List View Details**:
  + **Lead ID**: Unique identifier for the lead.
  + **Company Name/Customer Name**: Displays either the company name or customer name, whichever is available.
  + **Due Date for Rental Escalation**: The date by which the rental escalation must be actioned.
  + **Percentage of Rental Escalation**: The percentage increase proposed for the rental escalation.
* **Functionality**:
  + The BDM can interact with each lead to initiate conversations or negotiations with the client regarding the escalation.
  + This tab serves as a task list for the BDM to track and manage rental escalations.

**4. Layouts Received Tab**

* **Purpose**: Displays a list of leads where the BDM has requested layouts from the layouts team, and the layouts have been uploaded.
* **List View Details**:
  + **Lead ID**: Unique identifier for the lead.
  + **Company Name/Customer Name**: Displays either the company name or customer name, whichever is available.
  + **Status of the Lead**: The current status of the lead. *(Note: A list of possible statuses needs to be discussed and finalized.)*
* **Functionality**:
  + The BDM can click on a lead to view the uploaded layout provided by the layouts team.
  + This tab tracks the progress of layout requests and their delivery.

**Additional Notes**

* **Navigation**: Each category (Follow Ups, Scheduled Visits, Rental Escalation, Layouts Received) is accessible as a clickable option from the "Today's Tasks" section on the homepage, as shown in the screenshot.
* **Status List for Layouts Received**: A discussion is required to finalize the list of statuses for leads in the "Layouts Received" tab. Suggested statuses might include "Requested", "In Progress", "Layout Uploaded", "Under Review", "Approved", or "Rejected", but these need confirmation.

**Lead Detailed View Page Overview**

**Purpose**

The Lead Detailed View page provides a comprehensive overview of a lead’s information, accessible by clicking on a lead from the leads list. It displays general, non-editable lead details by default, along with editable sections for deeper insights. The page also facilitates quick actions and communication with the lead, ensuring the Business Development Manager (BDM) has all necessary tools to manage the lead effectively.

**Page Components and Functionality**

1. **Header Section**
   * **Search Bar**: Located at the top of the page, the search bar allows the BDM to search for leads or other data within the ERP system.
   * **Notification Icon**: Positioned next to the search bar, this icon alerts the BDM to new notifications (e.g., updates, reminders).
2. **Basic Lead Details (Non-Editable)**
   * This section provides a high-level, non-editable overview of the lead’s general information.
   * **Fields**:
     + **Lead ID**: Displays the unique identifier for the lead.
     + **Company Name/POC Name**: Shows either the company name or the point of contact (POC) name, depending on what is available.
     + **Lead Status (Leasing Status)**: Indicates the current leasing status of the lead. If the status is Cold Prospect (CP), Lost Prospect (LP), or Not Prospect (NP), an additional field, **Reason**, is displayed to explain the status.
   * **Contact Button**: A button with communication icons (Call, Email, WhatsApp) allows the BDM to reach out to the lead:
     + **Call Icon**: If only a primary phone number is available, clicking the icon copies the number to the clipboard. If a secondary phone number exists, a dropdown displays both numbers, and the BDM can select one to copy.
     + **Email Icon**: If only a primary email is available, clicking the icon copies the email to the clipboard. If a secondary email exists, a dropdown displays both emails for selection.
     + **WhatsApp Icon**: Clicking this icon redirects the BDM to the WhatsApp chat of the lead, using the primary phone number.
3. **Quick Action Buttons**
   * Four buttons are available on the page to redirect the lead to specific actions or views. These are:
     + **Lead Summary**: Redirects to the detailed Lead Summary section (described below).
     + **Layouts**: Redirects to the Layouts section, likely showing layouts requested or received for the lead (as seen in the "Layouts Received" tab in prior documentation).
     + **Proposal/Client**: Redirects to the Proposal Builder page (as described in prior documentation) to create or view proposals for the lead.
     + **Agreement**: Redirects to an Agreement page, likely for managing lease agreements or contracts with the lead.
4. **Lead Summary Section (Editable)**
   * Accessible via the "Lead Summary" button, this section provides detailed, editable information about the lead. It is subdivided into three subtopics:

Lead Snapshot Section

1. Name
   * Description: The full name of the lead or primary contact person.
   * Significance: Identifies the individual associated with the lead, making it easier to personalize communication.
2. Website
   * Description: The URL of the company’s website.
   * Significance: Provides a quick reference to the lead’s online presence, allowing sales teams to research the company further.
3. Lead Type
   * Description: The category of the lead (e.g., cold, warm, hot).
   * Significance: Helps prioritize leads based on their likelihood of conversion. For example, a "hot" lead may require immediate attention.
4. Business Description
   * Description: A brief overview of the company’s operations or industry.
   * Significance: Offers context about the lead’s business, helping sales teams tailor their approach to the lead’s needs.
5. Realtor
   * Description: The name or role of the realtor or agent associated with the lead (if applicable).
   * Significance: Identifies the intermediary or partner involved, which is particularly relevant for real estate or agency-based businesses.
6. Assigned to
   * Description: The name of the sales representative or team assigned to the lead.
   * Significance: Clarifies ownership and responsibility, ensuring the lead is actively managed by the correct team member.
7. Pre-Sales
   * Description: Indicates whether the lead is in the pre-sales stage (e.g., Yes/No).
   * Significance: Flags whether the lead is still in the early stages of engagement, requiring nurturing before entering the sales pipeline.

Engagement Tracker Section

1. Last Call Status
   * Description: The outcome of the most recent call with the lead (e.g., connected, no answer).
   * Significance: Tracks communication attempts, helping the team gauge the lead’s responsiveness.
2. Last Call Date
   * Description: The date of the most recent call made to the lead.
   * Significance: Provides a timeline of engagement, ensuring follow-ups are scheduled appropriately.
3. Follow-up Date
   * Description: The scheduled date for the next follow-up with the lead.
   * Significance: Ensures timely follow-ups, preventing leads from going cold due to delayed communication.
4. Call Status
   * Description: The current status of call attempts (e.g., scheduled, completed).
   * Significance: Tracks ongoing call activity, helping the team stay organized.
5. Lease Status
   * Description: Indicates the status of a lease agreement, if applicable (e.g., in progress, signed).
   * Significance: Relevant for businesses dealing with leases, this field tracks progress toward closing a deal.
6. Reason
   * Description: A note explaining the reason for the lead’s current status or recent activity (e.g., "Awaiting budget approval").
   * Significance: Provides context for the lead’s progress or delays, helping the team understand blockers.

Requirements Section

1. Preferred Location
   * Description: The desired geographic location for the lead’s needs (e.g., a city or region).
   * Significance: Helps match the lead’s requirements with available products or services in the specified area.
2. Property Name
   * Description: The specific property or project the lead is interested in, if applicable.
   * Significance: Identifies the exact product or service the lead is considering, streamlining the sales process.
3. Number of Seats
   * Description: The number of seats, units, or capacity required by the lead (e.g., for office space or event bookings).
   * Significance: Ensures the sales team can meet the lead’s capacity needs.
4. Budget
   * Description: The lead’s budget range for the product or service.
   * Significance: Allows the team to assess whether the lead’s budget aligns with the offerings, preventing mismatched expectations.
5. Expected Start Date
   * Description: The date the lead expects to begin using the product or service.
   * Significance: Helps the team plan timelines and ensure they can meet the lead’s expectations for delivery or implementation.

**Workflow for the BDM**

1. **View Lead Overview**:
   * The BDM clicks on a lead from the leads list to access the Lead Detailed View page, which displays the non-editable basic details (Lead ID, Company/POC Name, Lead Status, Reason if applicable).
2. **Communicate with the Lead**:
   * The BDM uses the Contact button to initiate communication via Call, Email, or WhatsApp. The system copies the contact details to the clipboard or redirects to WhatsApp as needed.
3. **Access Detailed Information**:
   * The BDM clicks the "Lead Summary" button to view and edit detailed information in the Lead Snapshot, Requirements, and Engagement Tracker sections.
4. **Perform Quick Actions**:
   * The BDM uses the Layouts, Proposal, or Agreement buttons to navigate to relevant sections for further actions (e.g., creating a proposal, viewing layouts).
5. **Track Engagement**:
   * The BDM updates the Engagement Tracker with the latest call statuses, follow-up dates, and leasing status to keep the lead’s progress current.

**Proposal Builder Page Overview**

**Purpose**

The Proposal Builder page allows the Business Development Manager (BDM) to create and configure proposals for leads, which can then be downloaded and shared with clients. It provides a structured interface to input details about the property, lease terms, and commercial requirements, ensuring all necessary information is captured before finalizing the proposal and transitioning the lead to the client stage.

**Page Components and Functionality**

1. **Header Section**
   * **Lead ID**: Displays the unique identifier of the lead for which the proposal is being created.
   * **Company Name**: Shows the company name associated with the lead.
   * **Leasing status**: A green dot (or other color based on status) indicates the current status of the lead.­ The exact status labels are not specified in the image but are typically inferred from the context of proposal creation.
2. **Proposal Tabs**
   * The page supports multiple proposals for a single lead, as indicated by the tabs labeled **Proposal 1**, **Proposal 2**, and **Proposal 3**. The BDM can switch between these tabs to create or edit different proposal versions for the same lead.
   * **Copying Values for New Proposals**: Whenever a new proposal is created (e.g., Proposal 2) and an existing proposal already exists (e.g., Proposal 1), the values from the existing proposal are automatically copied into the new proposal. The BDM can then edit these values as needed to reflect any changes or variations required for the new proposal.
   * When a proposal is confirmed by the client, the BDM clicks the "Finalize" button on that specific proposal tab (e.g., Proposal 1). This action transitions the lead from the proposal stage to the client stage, replacing the Proposal tab with a new **Client tab**. The details from the finalized proposal are automatically transferred to the fields in the Client tab.
3. **Lease Details Section**
   * This section captures the core details of the lease agreement for the proposal. It includes the following fields, typically implemented as dropdowns or text inputs:
     + **Building**: A dropdown to select the building associated with the proposal.
     + **Floor**: A dropdown to specify the floor within the selected building.
     + **Lock-in**: A dropdown or input to define the lock-in period for the lease.
     + **Months**: A field to specify the total duration of the lease in months.
     + **Late Fee**: A field to specify the late fee as a percentage, calculated on a weekly basis once the invoice is overdue past its due date.
     + **Start Date**: A field to specify the lease start date.
     + **Stop Date**: A field to specify the lease end date.
     + **Security Deposit**: A field to input the security deposit amount.
     + **Rental Escalation**: A dropdown or input to define the rental escalation terms (e.g., percentage increase over time).
     + **Invoice Generation Date**: A field to set the date for generating invoices.
     + **Amount**: A field to input the total amount or base rent for the lease.
4. **Commercial Section**
   * This section allows the BDM to specify the number of seats and amenities required by the client, which will be billed accordingly. It includes the following categories, each represented as a selectable field:
     + **Work Stations**: Allows the BDM to select a subcategory of workstations (e.g., standard desks, ergonomic desks) and specify the quantity.
     + **Cabins**: Allows selection of a subcategory of cabins (e.g., single cabins, executive cabins) and the quantity.
     + **Rooms**: Allows selection of a subcategory of rooms (e.g., meeting rooms, conference rooms) and the quantity.
     + **Furniture**: Allows selection of a subcategory of furniture (e.g., chairs, tables) and the quantity.
     + **Additional**: Allows selection of a subcategory for additional amenities (e.g., parking spaces, pantry equipment) and the quantity.
   * **Selection Process**: For each category, the BDM first selects the category (e.g., Work Stations), then chooses a subcategory from a dropdown (e.g., standard desks), and finally specifies the quantity required.
5. **Commercial Summary Table**
   * Below the Commercial Section, a table displays a summary of all selected items from the categories above. The table includes the following columns, all of which are editable to allow for last-minute updates:
     + **Name of the Product**: The name of the selected item (e.g., Standard Desk, Executive Cabin).
     + **Price of the Product**: The price per unit of the selected item.
     + **Quantity**: The number of units selected for the item.
   * The BDM can directly edit the values in the table (e.g., adjust the quantity or price) to make quick updates before finalizing the proposal.
6. **Action Buttons**
   * **Download**: Allows the BDM to download the proposal as a file (e.g., PDF) once it is ready. This is typically used to share the proposal with the client via email or other means.
   * **Finalize**: When clicked, this button:
     + Transitions the entire Proposal page to a new **Client page**.
     + Automatically updates the fields on the Client page with the details from the finalized proposal (e.g., lease details, commercial items, quantities, and prices).
     + Replaces the Proposal tab with a Client tab, indicating that the lead has moved from the proposal stage to the client stage.

**Workflow for the BDM**

1. **Select or Create a Proposal**:
   * The BDM selects an existing proposal tab (e.g., Proposal 1) or creates a new one (e.g., Proposal 2). If a new proposal is created and an existing proposal exists, the values are automatically copied from the existing proposal into the new one.
2. **Input or Edit Lease Details**:
   * The BDM reviews and edits the pre-filled fields (if copied) or fills in the required fields in the Lease Details section, such as building, floor, lease duration, and financial terms.
3. **Specify Commercial Requirements**:
   * The BDM selects categories, subcategories, and quantities for seats and amenities in the Commercial Section, updating any pre-filled values as needed.
4. **Review and Edit the Commercial Summary**:
   * The BDM reviews the Commercial Summary Table, making any last-minute edits to the product names, prices, or quantities as needed.
5. **Finalize the Proposal**:
   * Once the client confirms the proposal, the BDM clicks the "Finalize" button. This transitions the lead to the client stage, replaces the Proposal tab with a Client tab, and automatically populates the Client page with the proposal details.
6. **Download and Share**:
   * The BDM can download the proposal before or after finalizing to share it with the client.