SALES

1. Dashboard Overview

- Widgets for Quick Stats: Total Leads, Follow-ups, Inquiries, Quotations Generated.
- Charts & Graphs:
  - Lead Conversion Rate.
  - Sales Pipeline Status.
  - Inquiry Response Time Trends.
- Recent Activities: Latest follow-ups, inquiries, and quotations.
- Customizable Dashboard: Users can personalize widgets based on roles.

2. Client Follow-ups Module

- Follow-up List: Displays clients with pending follow-ups.
- Actions:
  - Schedule new follow-up.
  - Set reminders.
  - Update follow-up status (Contacted, Pending, and Not Interested).
  - Log communication details (email, call, meeting notes).
- Notifications & Reminders:
  - Automatic alerts for upcoming follow-ups.
  - Email and SMS reminders for sales representatives.

3. Manage Client Inquiries

- Inquiry Table: Displays client details, request type, status.
- Actions:
  - Add new inquiry.
  - Assign to a sales rep.
  - Update inquiry status (Open, In Progress, Closed, Won, Lost).
  - Attach documents or reference files.
- Filters & Search:
  - Sort inquiries by client, date, priority, or project type.
  - Full-text search for quick access.
- Inquiry Analytics:
  - Track the number of inquiries handled by each representative.
  - Measure average response and resolution time.

4. Blueprint Management (Plots & Villas)

- Blueprint Storage: Upload and categorize blueprint files.
- Actions:
  - View, edit, and share blueprints with clients.
  - Link blueprints to client inquiries and projects.

    - Set permissions for viewing and editing.
- Search & Filters:
    - Search by project name, client, or location.
    - Filter blueprints by category (residential, commercial, custom builds).
- Version Control:
    - Maintain multiple versions of a blueprint.
    - Track updates and modifications over time.

5. Quotation Generation

- Quotation List: Shows generated quotations with status.
- Actions:
    - Create new quotation (includes client details, project scope, pricing).
    - Edit or delete quotations.
    - Download and send as PDF.
    - Auto-calculate taxes and discounts.
- Tracking & Approvals:
    - Status updates (Sent, Approved, Rejected, Revised).
    - Client can approve or request changes digitally.
- Quotation Templates:
    - Customizable templates for different projects.
    - Auto-fill features for repetitive services.