Frontend Product Requirements Document (PRD)

PRODUCT REQUIREMENTS DOCUMENT (PRD) - FRONTEND

Project: Lead Follow-Up Planner - MVP

Version: 1.0

Owner: Deb

Frontend Platform: Web (React/Next.js or Flutter Web - TBD)

1. PURPOSE

The Lead Follow-Up Planner is a web app that allows authenticated users to add leads, select goals, create basic follow-up plans, and send reminders or automated messages across multiple channels (Email, LinkedIn, Phone, Message).

The MVP focuses on minimal UI, functional flows, and integration readiness with backend APIs.

2. SCOPE

This PRD covers Frontend implementation for:

- Authentication (Google Sign-In + access check)

- Lead creation & editing

- Follow-up plan setup

- Template selection & minor editing

- Plan overview & execution tracking

- Basic dashboard view for upcoming steps

3. USER ROLES

Authorized User - Can log in, create, view, and edit leads.

Unauthorized User - Cannot proceed beyond login screen.

4. FUNCTIONAL REQUIREMENTS

Authentication

- FR-1: Google OAuth login

- FR-2: Check access via /users/check-access

- FR-3: Show Access Denied if not allowed

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Dashboard

- FR-5: List of leads

- FR-6: Show name, goal, % completion

- FR-8: Add Lead button

Lead Creation Wizard

- Step 1: Lead Details

- Step 2: Select Goal

- Step 3: Plan Setup

- Step 4: Contact Info

- Step 5: Plan Step Setup

- Step 6: Plan Overview

Execution & Tracking

- FR-25: Show Today's and Upcoming tasks

- FR-26: Mark steps as done

5. NON-FUNCTIONAL REQUIREMENTS

- Minimal design using Material UI/Flutter defaults

- Mobile responsive

- Basic form validation

6. API INTEGRATION POINTS

- POST /auth/google

- GET /users/check-access

- GET /leads

- POST /leads

- PUT /leads/{id}

- POST /follow-up-plan

- GET /follow-up-plan/{leadId}

- PATCH /follow-up-step/{stepId}

7. UI/UX NOTES

- Stepper navigation

- Consistent icons for channels

- Minimal colors and typography

8. OPEN QUESTIONS

- Editing after creation?

- Overdue step highlighting?

- Push notifications in MVP?