1. Lead Management

1.1. Lead Capture & Import

- Manual Entry: Users can manually create new lead entries.
- Bulk Import: Ability to import leads via CSV/Excel files or integrate with other lead sources.
- Web Form Integration: Capture leads directly from the website using integrated web forms or API endpoints.

1.2. Lead Data Fields

- Basic Information: Name, contact details (email, phone), company, job title.
- Additional Details: Lead source, industry, geographic location, and custom fields as needed.
- Lead History: A timeline of interactions, status updates, and communications.

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2. Status Updates & Workflow Management

2.1. Customizable Statuses

- Pre-defined Statuses: Default stages such as New, Contacted, Qualified, In Progress, Won, and Lost.
- Custom Statuses: Administrators can add, remove, or modify statuses to suit business needs.

2.2. Automated Workflow

- Status Transition Rules: Automatically trigger notifications or tasks when a lead moves from one stage to another.
- Task Reminders: Set follow-up tasks based on status changes with customizable timeframes.

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3. Staff Assignment & User Management

3.1. Role-Based Access Control (RBAC)

- User Roles: Define roles such as Admin, Manager, Sales Representative, etc.
- Permissions: Set granular permissions for creating, editing, and viewing leads and records.

3.2. Lead Assignment

- Manual Assignment: Administrators or managers can manually assign leads to specific staff.
- Automated Assignment: Option to use rules (e.g., round-robin or based on territory/expertise) to assign leads automatically.
- Reassignment Capability: Easy reallocation of leads between staff members with audit logging.

3.3. Notifications & Alerts

- Email/Push Notifications: Notify staff of new assignments, updates, and pending tasks.
- In-App Alerts: Real-time updates within the CRM dashboard.

4. Record Management & Updates

4.1. Editable Fields

- Inline Editing: Allow users to update lead information directly from list views or detail pages.
- Batch Updates: Support updating multiple lead records simultaneously.

4.2. Data Integrity

- Validation Rules: Ensure required fields are completed and data is in the correct format.
- Duplicate Checking: Alert users to possible duplicate entries during data entry or import.

5. Work Record Uploads

5.1. File Upload Capabilities

- Attachment Support: Allow staff to upload documents, images, PDFs, and other file types to lead records.
- Drag-and-Drop Interface: Simplify file uploads with an intuitive drag-and-drop feature.

5.2. File Management

- File Versioning: Keep track of different versions of uploaded documents.
- Storage & Retrieval: Integrate with cloud storage or local servers with secure access protocols.
- File Size & Type Restrictions: Configure acceptable file types and size limits.

6. Dashboard & Reporting

6.1. Visual Dashboards

- Overview Metrics: Display key performance indicators (KPIs) such as a number of new leads, conversion rates, and sales pipeline status.
- Customizable Views: Allow users to customize dashboards based on their roles and preferences.

6.2. Reporting Tools

- Standard Reports: Pre-built reports on lead status, staff performance, conversion rates, etc.
- Custom Reports: Enable users to generate and save custom reports.
- Export Options: Ability to export reports in various formats (CSV, PDF, Excel).