

Power Platform Lead Management System Project Architecture

[Lucidchart Diagram Link](#)

Marketing User

Sales User

Power Apps - Canvas App Lead Management App

Lead Gallery Screen

- Search Leads
- Filter by Priority
- View Assigned Leads

Lead Detail Screen

- View/Edit Lead
- Roles-Based Field

New Lead Screen

- Create Lead
- Auto-Assignment Logic

Microsoft Dataverse

Lead

- First Name
- Last Name
- Email
- Phone
- Campaign (Lookup)
- Estimated Revenue
- Priority (Auto)
- Status
- Assign To (User)

Campaign

- Campaign
- Source
- Start Date
- End Date

AppRole

- Role Name
- Description

Users

- Name
- Email
- AppRole (Lookup)

Business Rule

- Priority based on Revenue
- Default Status = New

Power Automate Flow

- New Lead Notification
- High Priority Alert
- Follow-Up Task Creation

Power BI Dashboard

- Leads by Campaign
- Lead Priority Distribution
- Sales Performance Metrics