**Lead Management Software**

**No. of Stakeholders:**

1. Admin
2. Sub admin – GN
3. Sub admin – R
4. Team Member

**Requirements of Admin:**

*Admin shall be able to:*

1. Login
2. Decide Roles
3. Create Team Members, create users (Name, Dept, Campus (GN/ R), team info, status)
4. Upload inquires (in excel format)
5. Add extra leads
6. Distribute enquires
7. Update final status of the student
8. Search lead by 🡪 Username, lead between two dates, location

**Requirements of Sub Admin – GN**

*Sub admin of GN shall be able to:*

1. View allotted leads
2. Update remarks ( R1, R2, R3, R4), 10th %, 12th%, Board, visit status(by default no), final status of the student, Reason of transfer
3. Transfer leads to Ratibad
4. View statistics on dashboard:

* Total leads given
* No. of visits done
* Positive leads
* Closed leads
* Converted leads

**Requirements of Sub Admin – R**

*Sub admin of R shall be able to:*

1. View allotted leads
2. View transferred leads- remarks ( R1, R2, R3, R4), 10th %, 12th%, Board, visit status(by default no), final status of the student, Reason of transfer, transfer by
3. Distribute leads to Ratibad team member(using UID)
4. View statistics on dashboard:

* Total leads given
* No. of visits done
* Positive leads
* Closed leads
* Converted leads

**Requirements of Team Members:**

*Team member shall be able to:*

1. View allotted leads
2. update remarks ( R1, R2, R3, R4), visit status(by default no), final status of the student
3. View statistics on dashboard:

* Total leads given
* No. of visits done
* Positive leads
* Closed leads
* Converted leads

**Tables:**

1. **tbl\_userinfo**

**Description:** This contains the information about the team member and

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S.No** | **Field Name** | **Data type** | **Field type** | **Details** |
| 1. | U\_ID | Varchar | Primary Key | User Id of Team members |
| 1. 2. | Name | Varchar | Not null | Name of team members |
| 3. | Department | varchar | Not null | Department |
| 1. 4. | Role | Varchar | Not null | Contains team member/sub admin |
| 5. | Status | Boolean | Not null | Active/inactive |

2. **tbl\_lead\_management**

**Description:** This contains the information about the leads which will come from lead excel file.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S.No** | **Field Name** | **Data type** | **Field type** | **Details** |
| 1. | E\_ID | Int | Primary Key | enquiry Id |
| 1. 2. | Student Name | Varchar | Not null | Name of Student |
| 3. | Course | Varchar | Null | Course(Btech/Mtech/MBA/pharmacy) |
| 1. 4. | Mobile no | Varchar | Not null | Mobile number |
| 5. | Email id | Varchar | Null | Email id of the student |
| 6. | Branch | Varchar | Null | Branch(CS/ME/EC/EX/Bpharma..) |
| 7. | City | Varchar | Null | City |
| 8. | State | Varchar | Null | State |
| 9. | Date | Date time | Not null | Date enquiry is generated |
| 10. | Source | Varchar | Not null | Website/ C360/ Phone |

1. **tbl\_lead\_distribution**

**Description:** This is used to store information about lead distribution

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **S.No** | **Field Name** | **Data type** | **Field type** | **Details** |
| 1. | L\_ID | int | Primary Key | Lead Id(Auto increment) |
| 2. | E\_ID | int | Foreign Key | Enquiry id |
| 3. | U\_ID | varchar | Foreign Key | User id |
| 4. | R1 | varchar | Null | Remark 1 |
| 5. | R2 | varchar | Null | Remark 2 |
| 6. | R3 | varchar | Null | Remark 3 |
| 7. | R4 | varchar | Null | Remark 4 |
| 8. | 10th% | Varchar | Null | 10th marks |
| 9. | 12th% | Varchar | Null | 12th marks |
| 10. | board | varchar | Null | Board(CBSE/MP/Bihar..) |
| 11. | visit | Varchar | Null | Visit (done/notdone) |
| 12. | Lead\_allotment\_Date | Date/time | Not null | Date of allotment of lead |
| 13. | Tentative\_visit\_date | Date/time | Not null | Tentative date of visit |
| 14. | status | Varchar | Not null | Closed converted |
| 15. | Transfer\_by | varchar | Null | Lead transferred by |
| 16. | Reason\_of\_transfer | Varchar | Null | Why lead is transferred |