**Core Modules for the CRM Project**

**1. Contact Management**

**Features:**

* **Add Contact**: Form with fields such as:
  + Name
  + Email
  + Phone
  + Address
  + Company
  + Tags (for categorization)
* **Edit/Delete Contact**: Ability to modify or remove contact information.
* **Attach Notes and Files**:
  + Option to write text notes.
  + Upload and attach files (PDFs, images, documents).

**2. Lead Management**

**Features:**

* **Add/Edit/Delete Leads**:
  + Input fields: Name, Contact Info, Lead Source, Assigned Sales Rep, Status.
  + Predefined lead statuses (e.g., New, Contacted, Qualified, Lost).
* **Assign Leads**: Assign to sales representatives with an option for reassignment.
* **Lead Tracking**:
  + Visual indicators for lead progress.
  + Timestamp for status updates.

**3. Sales Pipeline Management**

**Features:**

* **Pipeline Stages**:
  + Stages (e.g., Prospecting, Negotiation, Closed).
  + Define expected revenue and close dates per opportunity.
* **Opportunity Management**:
  + Link opportunities to specific contacts or leads.
  + Track the monetary value of each deal.
* **Stage Progression**: Drag and drop functionality to move opportunities between stages.

**4. Task and Activity Management**

**Features:**

* **Create and Assign Tasks**:
  + Fields: Task Name, Assigned User, Due Date, Priority, Related Contact/Lead.
* **Activity Logging**:
  + Log calls, meetings, and emails.
  + Add notes or attachments to activities.
* **Reminders**: (Optional)
  + Notifications for upcoming tasks or overdue activities.

**5. Email Integration**

**Features:**

* **Email Notification for different activities**

**6. Reporting and Analytics (Optional)**

**Features:**

* **Sales Reports**:
  + Total revenue, deals closed, and average deal size.
  + Breakdown by sales representative or time period.
* **Activity Reports**:
  + Completed tasks, emails sent, and calls made.
* **Custom Dashboards**:
  + KPIs (e.g., conversion rate, average lead response time).

**CRM Workflow**

**1. Contact Management Flow**

1. **Input Contact Data**:
   * The user navigates to the "Contacts" module.
   * Fills in a form to create a new contact (name, email, phone, etc.).
   * Saves the contact.
2. **View Contacts**:
   * A list of all contacts is displayed in a table.
   * Users can search, filter, and sort by name, tags, or other fields.
3. **Modify Contact**:
   * The user clicks on a contact to view details.
   * Edits information or attaches notes/files as needed.
4. **Delete Contact**:
   * The user selects one or more contacts and deletes them.

**2. Lead Management Flow**

1. **Create a Lead**:
   * The user goes to the "Leads" module and clicks "Add Lead."
   * Inputs lead details (name, contact info, lead source, assigned sales rep).
   * Saves the lead.
2. **Assign Lead**:
   * The admin assigns the lead to a sales representative.
   * The system notifies the representative about the assignment.
3. **Track Lead Status**:
   * The user views leads in a Kanban-style board or list view.
   * Drags and drops leads to change their status (e.g., from "New" to "Contacted").
4. **Update Lead Details**:
   * Opens a lead detail view and updates information or adds notes.

**3. Sales Pipeline Management Flow**

1. **Create an Opportunity**:
   * The user selects a contact or lead and creates an opportunity.
   * Inputs details like potential value, expected close date, and stage.
2. **Manage Opportunities**:
   * The user views opportunities on the pipeline dashboard.
   * Drags and drops opportunities to progress through stages.
3. **Track Pipeline Metrics**:
   * The user checks KPIs (e.g., total value of deals in negotiation stage).

**4. Task and Activity Management Flow**

1. **Create a Task**:
   * The user navigates to the "Tasks" module and adds a task.
   * Inputs details like task name, due date, priority, and assignee.
   * Links the task to a contact or lead.
2. **View Tasks**:
   * The user sees tasks in a calendar or list view.
   * Filters tasks by assignee, priority, or due date.
3. **Log Activities**:
   * The user selects a contact or lead and logs an activity (e.g., call, email, meeting).
   * Adds relevant notes or files.
4. **Receive Reminders**: (Optional)
   * The system sends notifications for upcoming or overdue tasks.

**5. Reporting and Analytics Flow (Optional)**

1. **Generate Reports**:
   * The user selects a report type (e.g., sales performance, activity summary).
   * Sets filters (e.g., date range, sales rep).
2. **View Dashboard**:
   * The system displays graphical insights (e.g., bar charts, line graphs).
   * KPIs are shown on the dashboard (e.g., conversion rates, lead response time).
3. **Export Reports**:
   * The user exports the report in a desired format (e.g., PDF, Excel).

**User Roles and Permissions**

* **Admin**:
  + Full access to all modules.
  + Can assign leads, create opportunities, and manage users.
* **Sales Representative**:
  + Limited access to leads and opportunities assigned to them.
  + Can view and update their tasks, activities, and contacts.
* **Manager**:
  + Can view all leads, contacts, and pipeline data.

**System Integration Points**

* **Email Integration**:
  + Sync with Gmail/Outlook for sending and receiving emails.
* **Calendar Integration**:
  + Link tasks and activities to Google or Microsoft calendars.
* **Notification System**:
  + Trigger reminders-Send Email Notifications.

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