**Lead Management Portal..!!**

**Document:**

#### **System Requirement Specification Document**

**Title:**

System Requirement Specification for Lead Management System

**Team:**

Direct Customer, Indirect Customer, Architect, Business Analyst, Quality Assurance Team, System Analyst

**Objective (Purpose):**

The objective of the sales lead tracker is to provide a centralized and efficient way to manage and track the progress of leads throughout the sales process. This will include capturing lead information, tracking lead status, and generating reports on lead activity.

A sales lead tracker can help organization:

* Improve the efficiency of the sales process by streaming lead management.
* Increase visibility into lead activity and performance.
* Enhance collaboration between sales teams and departments.
* Improve the ability to forecast sales and identify trends in lead behaviour.

**Scope:**

This can help Organization:

1. Improve the efficiency of the sales process by automating lead management tasks and providing real time visibility into lead activity and performance.
2. Lead Management ,the system should allow sales representatives and managers to track and manage leads, including capturing contact information, noting interactions and communication, tracking status of the lead and storing notes and other relevant information.
3. Contact Management : The system should allow users to store and manage contact information for leads, clients, and other stakeholders, including the ability to add, edit, and delete contacts.
4. Property Management: The system should allow sales representatives and managers to track properties for sales, including details such as location, price square footage, and other relevant information.
5. Facilitate data-driven decision-making by providing access to accurate and up-to-date lead information.
6. User Management : The system should allow managers to set up and manage user accounts for sales representatives, with role based access control to ensure that users only have access to the features and information they need.

**Definitions:**

LMS: Lead Management System

QA: Quality Assurance

Portal: Personalized Online Web Application

MIS: Management Information System

CRM: Customer Relation Management

BI: Business Intelligence

KPI: Key Performance

Dashboard: Personalized information presented using BI techniques such grid, score card, graph, KPI

**Functional Requirements:**

Functional requirements for a sales lead tracker may include:

1. **Agent-**

* Login into the dashboard.
* Check for the task on to the Calender.
* Download the ExcelSheet uploaded by Team Leader for daily list of calls.
* Upload the excel of the daily calls made.
* Generate a new lead if a prospect is interested to buy a flat and fill iall the details gathered on call.
* Download the excel from the calender of follow up calls for the day.
* Upload images in the leads profile form once a site visit is done
* The ability to generate reports on leads profile and requirement.
* Close the lead once sales is done.

**2.. Team Leader :**

* Dashboard to upload excels of daily list for all agents in the team.
* will have a dashboard which shows the performance of every agent depending on the leads generated by them and sales achieved.
* will be able to see the leads information uploaded by every agent.
* will have a dashboard to dowlnoad excels uploaded by agents of their daily calls and will highlight if some agent has not uploaded it.
* The ability to generate reports on leads profile and requiremen

**3 Manager :**

* Will be able to update new project details in the news feed.
* will be able to add new joining agents details.
* will be able to make a particular account as agent or Team leader.
* will have a dashboard to check particular teams with respect to overall sales done by the team and revenue generated.
* The ability to assign leads to specific agent with higher experience if he gets a

VIP customer.

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**Non-Functional Requirement :**

**Security:**

The system should protect user data and prevent unauthorized access to sensitive information. This includes measures such as encryption, user authentication, and role-based access control.

.**Performance**:

The system should be able to handle a large number of concurrent users and respond to requests quickly, with minimal delays.

**Availability:**

The system should be available 24/7 with minimal downtime.

**Maintainability:**

A Commercial database software will be used to maintain System data Persistence. A readymade Web Server will be installed to host o to management server capabilities. IT operations team will easily monitor and configure System using Administrative tools provided by Servers. Separate environment will be maintained for system for isolation in production, testing, and development.

**Portability:**

PDA: Portable Device Application System will provide portable User Interface ( HTML, CSS, JS) through users will be able to registered the own information. System can be deployed to single server, multi server, to any OS, Cloud (Azure or AWS or GCP)

**Accessibility:**

**Usability:**

The system should be intuitive and easy to use for both sales representatives and managers, with a clear and consistent user interface.

**Efficiency:**

On Festival season, maximum number of users will purchase Flats ect. view products with same response time. System will be able to manage all transaction with isolation.

**Compilance :**

The system should be able to comply with any legal and regulatory requirements of the real estate industry.

**Scalability :**

The system should be able to accommodate a growing number of leads and users without significant performance degradation.

**Backup & Recovery :**

The system should have a robust backup and recovery system in place to ensure that data is not lost in case of any system failure.