**Functional Requirements of the UI of the CRM-Project**

**1. Master Modules (Core Data Entities)**

These are the main data structures your CRM will revolve around.  
They will usually be managed in their own **list/detail pages**, but their key summaries will appear on the dashboard.

**1.1 Leads Master**

* Lead ID, Name, Contact Info, Source, Status, Assigned To, Stage, Notes
* Used for **Lead Overview**, **Lead Source Charts**, and **Geographical Insights**.

**1.2 Deals / Opportunities Master**

* Deal Name, Linked Lead, Stage (Opportunity → Deal → Closed), Value, Expected Close Date
* Used in **Sales Pipeline** and **Deals by Stage** charts.

**1.3 Tasks & Activities Master**

* Task Name, Type (Call/Meeting/Email), Due Date, Status, Assigned To
* Used for **Task Tracker** and **Reminders**.

**1.4 Customers Master**

* Customer Name, Lifecycle Stage (Onboarding, Active, At Risk, Inactive), Revenue, History
* Used for **Customer Lifecycle KPIs** and **Retention/Churn Analysis**.

**1.5 Campaigns Master**

* Campaign Name, Channel (Email/Social/WhatsApp), Metrics (Sent, Opened, Clicked, Bounced), Cost
* Used for **Marketing Insights** and **Customer Acquisition Cost**.

**2. Dashboard Module (Home Page)**

This is the **landing page** after login. It shows **summarized, visual data** from multiple masters.  
I suggest grouping UI sections like this:

**A. KPI Cards Row (Top Bar)**

* Total Leads
* New Leads This Month
* Deals in Pipeline (Count & Value)
* Revenue This Month
* Conversion Rate

**B. Visual Analytics Section**

* **Left:** Pie Chart → Leads by Source
* **Middle:** Bar Chart → Deals by Stage
* **Right:** Line Chart → Sales Trend Over Time

**C. Task & Activity Tracker**

* Today’s Calls/Meetings/Follow-Ups
* Overdue Tasks
* Recently Completed Tasks

**D. Sales Team Performance**

* Top 3 Performing Sales Reps with:
  + Leads handled
  + Deals closed
  + Conversion rate

**E. Revenue Snapshot**

* Monthly revenue bar graph
* Comparison with previous period

**3. Marketing Insights Module**

Separate section (or tab) in the dashboard for marketing teams:

* Email Campaign Metrics (Sent, Opened, Clicked, Bounced)
* Top Performing Templates
* Cost vs Revenue Graph (Customer Acquisition Cost)

**4. Customer Management Module**

* Lifecycle Distribution Chart (Onboarding, Active, At Risk, Inactive)
* Retention vs Churn Chart
* Export Options (PDF/CSV)

**5. Geo Insights Module (If Location Data Exists)**

* Interactive map with pins showing lead distribution by city/state/country.
* Hover tooltip: Lead count & conversion rate per location.

**6. User/Team Personal Dashboard**

* Filter dashboard by:
  + User
  + Team
  + Region
* Daily Summary Widget:
  + Today’s meetings/tasks
  + New leads assigned
  + Deal updates

**7. Admin / Settings Module**

* **Dashboard Filters:** Time range, Team, Campaign, Region
* **Widget Customization:** Drag-and-drop reorder, add/remove widgets
* **System Alerts:** Show sync status (Mail/Call API)
* **Dark/Light Mode Toggle**