**Old app :** [**https://winchl.com/**](https://winchl.com/) **uid: demo pwd: chldemo**

**Admin panel**

1. Manage User:
   * Add New User:
     + User Name: [Text box]
     + Email id: [Text box]
     + Employee Code: [Text box]
     + Phone no: [Text box]
     + Department: [Select]
     + User vertical: [Select]
     + Office location: [Select]
     + User Role: [Select]
     + Active: [Yes/No]
   * Edit/Delete User

1. Manage Master

* Manage Role:
  + Add new role:
    - Name:…………………..
    - Description:……………… (optional)
  + Edit/Delete Roles
  + Assign menu to role:
    - Select Manu: <Drop Down> -- List all menu and sub menu and it will be multi selection
    - Assign to role: <Drop down> -- List all roles
  + Edit/delete assignments.
* Manage Client Industries
  + Add new Industries
    - Name:…………………..
  + Edit/Delete Industries
* Manage Currency
  + Add new Currency
    - Name:…………………..
  + Edit/Delete Currency
* Manage Service
  + Add new Service
    - Name:…………………..
  + Edit/Delete Service
* Manage FY
  + Add new Service
    - Name:…………………..
  + Edit/Delete FY
* Manage Lead Category
  + Add new lead Category
    - Name:…………………..
  + Edit/Delete lead Category
* Manage Departments
  + Add new department
    - Name:…………………..
  + Edit/Delete department
* Manage Office location
  + Add new location
    - Name:…………………..
  + Edit/Delete location
* Manage Vertical
  + Add new vertical
    - Name:…………………..
  + Edit/Delete vertical
* Manage Designation
  + Add new Designation
    - Name:…………………..
  + Edit/Delete vertical

**User Dashboard:**

* Manage Leads.
  + Add New leads.
    - Company name <Text Box>
    - Contact person <Text Box>
    - Designation <Select box>
    - Email id <Text Box>
    - Phone No <Text Box>
    - Location <Text Box>
    - Lead category [Fresh/Prospect/Hot/Dead]
    - Vertical < Select box>
    - Lead description: <Text Area>

Note: Created date will be today date by default.

* + Edit/Update/Delete
    - ------- -------- ---------- --------- ------------
  + Once the Lead category changed to Prospect OR Hot, need to fill below fields.
    - * Client Industry <Select box>
      * Service [<Select box>Multi selection]
      * Website <Text box>
      * Reference <Text box>
      * Remarks <Text area>
      * Add Multiple Office Location (one office location mandatory)
        + Name of location <Text box>
        + Address <Text box>
        + City <Text box>
        + Country < select box >
        + State <select box>
        + Pin code <Text box>
      * Add Multiple Contact Person (One contact person mandatory)
        + Select Office location.
        + Name, Designation, Phone No, email id
    - Once all the detail submit, it will added in to client table and listed under manage client menu.
  + Search leads [Based on Date Range, Company name, State, Lead category]
* Manage Client:
  + CRUD
  + Add new client [all data which are given above along with lead filed]