Tamiti Studio Sprint 3 Documentation: Field & Lead Tracker

## 🚀 Sprint Focus

Build a robust field rep and lead management system that:

- Captures field visit data and converts visits into leads

- Tracks follow-ups, lead health, and reminders

- Provides rep performance metrics (KPI)

- Enables location-based insights and client tagging

## 📦 Stack Highlights

Apps: `field`, `core`, `common`

Features:

- Lead conversion from visit logic

- Lead scoring and hot lead filters

- KPI tracking by rep/month

- Enum-driven classification (LeadStage, LeadSource, etc.)

- Admin actions (convert visit to lead)

- Reminder models & lead follow-ups

- DRF nested serializers, viewsets, and smart filtering

Test Suite: `pytest`, `factory\_boy`

Docs: This document + OpenAPI-compatible serializers/views

## 🧱 Models Implemented

field.models:

- Zone: Regions visited by reps

- Lead: Full business/contact details, lead score, stage, priority

- Visit: Captures contact attempt, outcome, follow-up intent, etc.

- LeadAction: Follow-up tracking with type, notes, and next steps

- LeadReminder: Email/SMS reminder queue with timestamp

- RepKPI: Monthly lead tracking & response time metrics

common.enums:

- LeadStage, LeadSource, FollowUpType, VisitOutcome, PriorityLevel

## 📊 Views & APIs

field/views.py:

- ZoneViewSet, LeadViewSet, VisitViewSet, LeadActionViewSet

- Extra Actions:

- visits/{id}/convert\_to\_lead/

- leads/hot/

- Filters: search by contact name, location, tags, score

- Nested lead actions included in LeadSerializer

## 🔍 Filtering & Pagination

- Search: contact\_name, business\_name, zone, location

- Ordering: lead\_score, priority, follow\_up\_date

- Pagination: Default via common.pagination.DefaultPagination

## 🔐 Permissions

- All endpoints restricted to authenticated users

- Future: IsFieldRepOfZone permission to restrict zone access

## 🧪 Test Suite

tests/:

- Full model factories: User, Zone, Lead, Visit, LeadAction

- Unit tests:

- lead.is\_hot\_lead() and has\_pending\_follow\_up()

- Visit -> lead conversion logic

- LeadAction creation

- API tests:

- POST /visits/{id}/convert\_to\_lead/

- Lead retrieval with filters

## ⚙️ Admin Customizations

- Inline LeadAction under Lead

- Convert visit to lead from bulk admin actions

- Autocomplete and searchable FKs

- Lead list view shows follow-up dates, priorities, and rep assignment

## ✅ Outcome of Sprint 3

- Scalable field visit-to-lead workflow

- Reminder-ready model structure

- KPI infrastructure for performance tracking

- DRF-powered endpoints with test coverage

- Reusable enums and pagination

Documentation and OpenAPI-ready schema

Next: Sprint 4 → Campaign Manager (client campaigns, segments, bulk engagement)