

MERN Final Evaluation – Sales CRM Edition (June 2025)

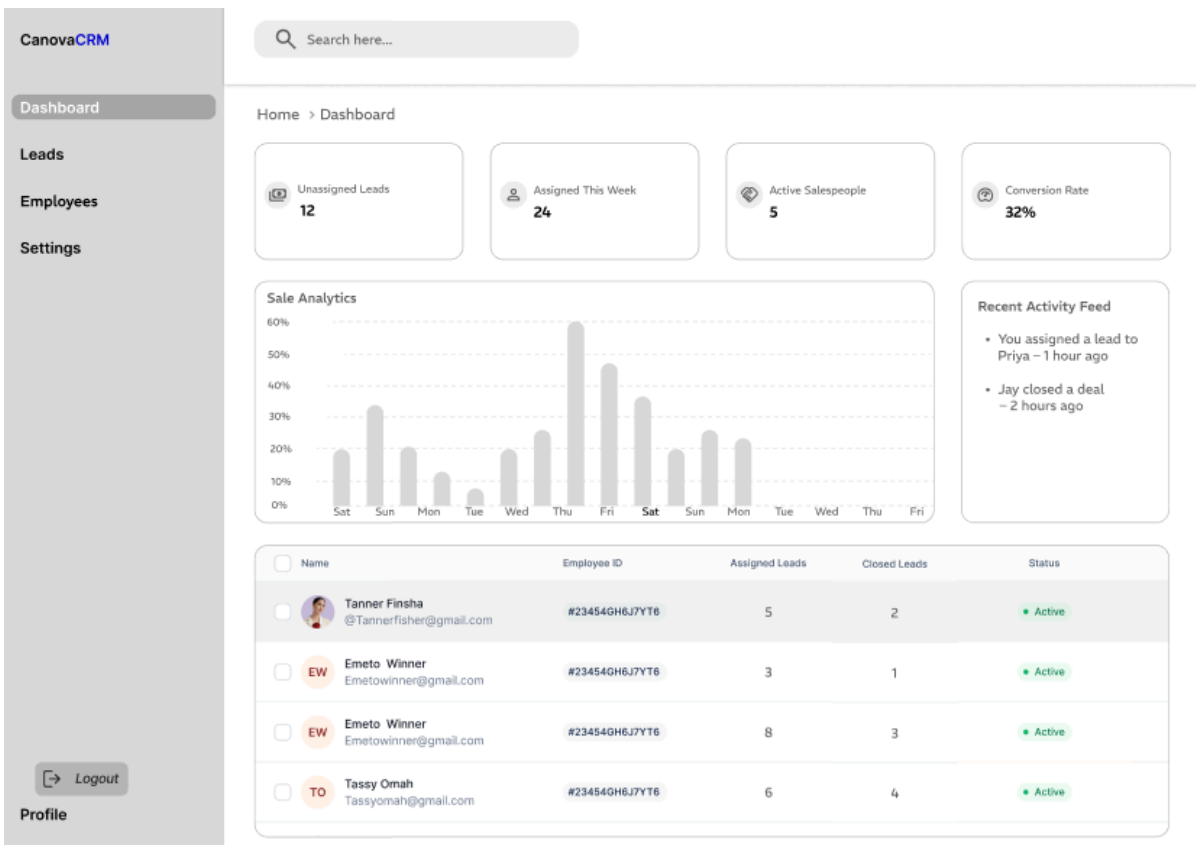
Problem Statement

Build a Sales CRM Dashboard application where:

- Admins can monitor leads, employee performance, and daily activities.
- Sales employees can manage their assigned leads, schedule calls, and maintain attendance.
- Real-time insights are provided via analytics and visual data representations.

Role: Admin

Page 01:



Design Corrections:

1. The logout button can be removed / omitted for ALL PAGES.

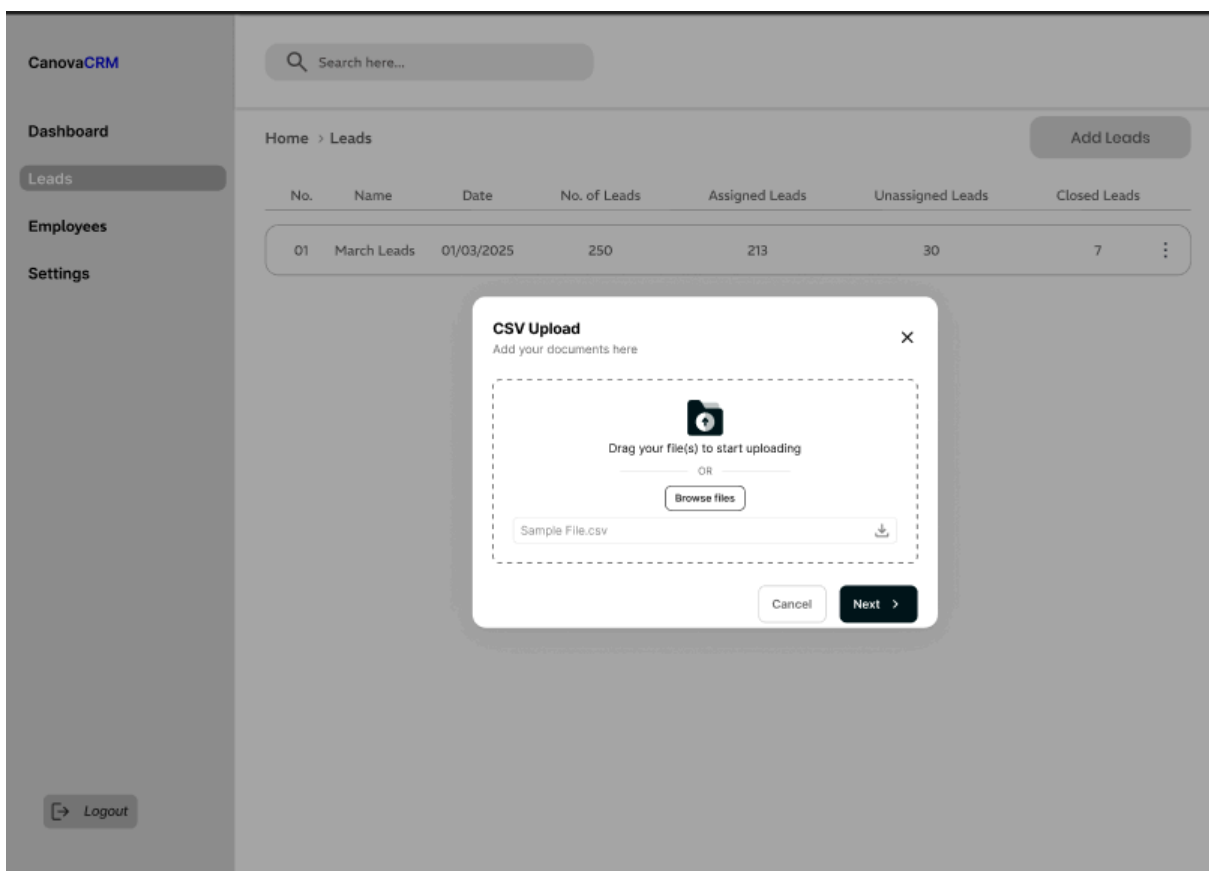
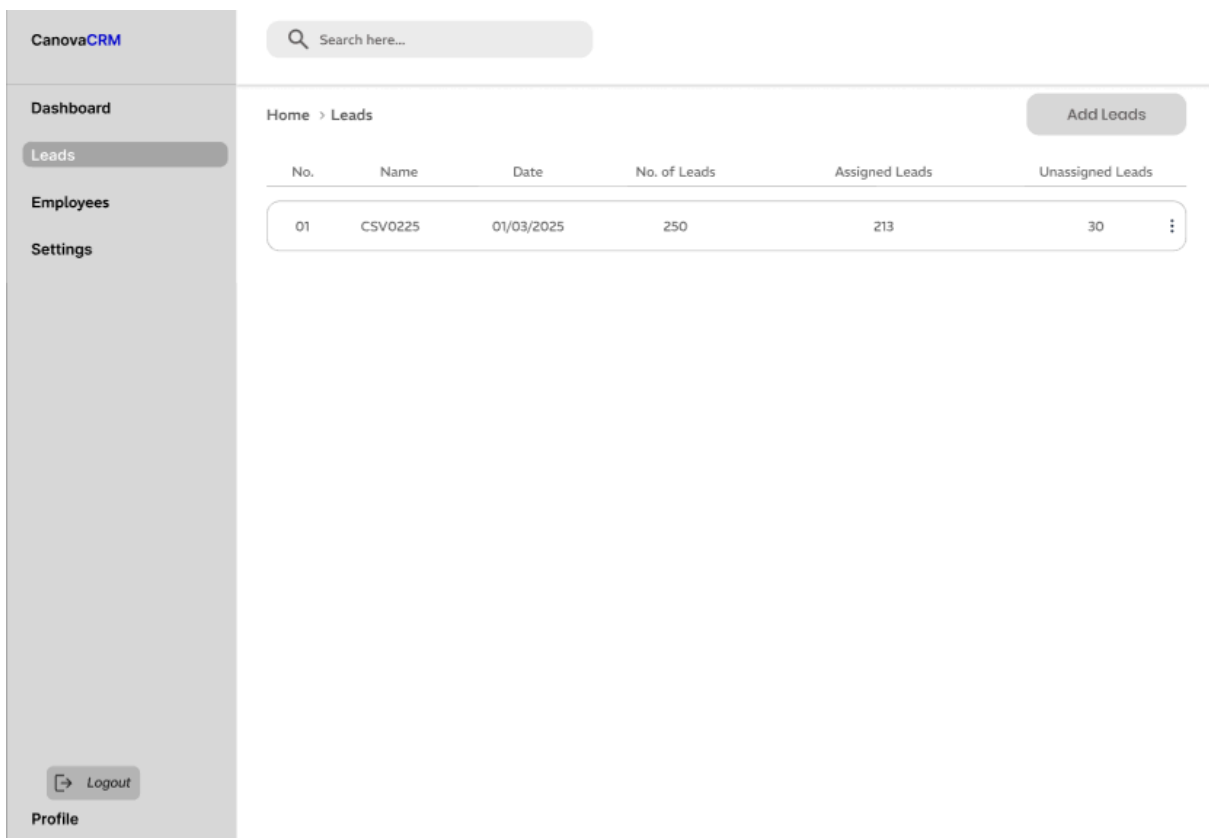
2. The Settings / Profile page points to the same page, so **either one (NOT BOTH)** of them **can be chosen to be removed / omitted by your choice from ALL PAGES**.
3. Check Boxes for Bulk Actions in the list of Employees **is to be ignored**.
4. Search Box on top **is to be removed / Ignored**.
5. The values on the y-axis on the chart will **NOT BE** percentages but will be numbers only.

Note: If a student has included any of the above components that are to be ignored, marks will not be deducted, but it is advisable to exclude the components mentioned in the above points for ALL PAGES.

Design Details:

1. The **“Recent”** activity will be defined as activities forming the **top 10 latest** activity, and not by date.
 2. The x-axis of the chart may contain **anywhere between 7 to 14 days of data**.
 3. The y-axis of the chart will represent the total number of sales done up to that particular point of time on that day, and total no of sales done in the entire day for previous days.
 4. The formula of conversion rate = **(no of closed leads / total no of leads) x 100%**
 5. Images in the display picture can be either a placeholder icon or preferably **any two letters of the name**.
 6. There should be interactive hover over stats for the charts mentioning total sales.
 7. The Recent activity section would contain the three activity, that is assigning a lead, closing of a lead and adding of a lead.
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Page 02, 03, 04:



Design Corrections:

1. The three dot icon at the end of each record of Leads **can be omitted**.
2. Download Icon on File upload **can be ignored**.

Design Details:

1. The fields No of leads, Assigned Leads and Unassigned Leads need to be calculated from the data extracted from the **.CSV file uploaded**.
2. The search should handle any key that matches from the CSV uploaded.
3. The structure of the CSV uploaded will be as follows.
4. File Upload will only take one file at a time with possible multiple records of leads.
5. Follow the Modal Design and a click outside should close the modal and should have a backdrop filter as shown
6. Add Leads

Manual Entry

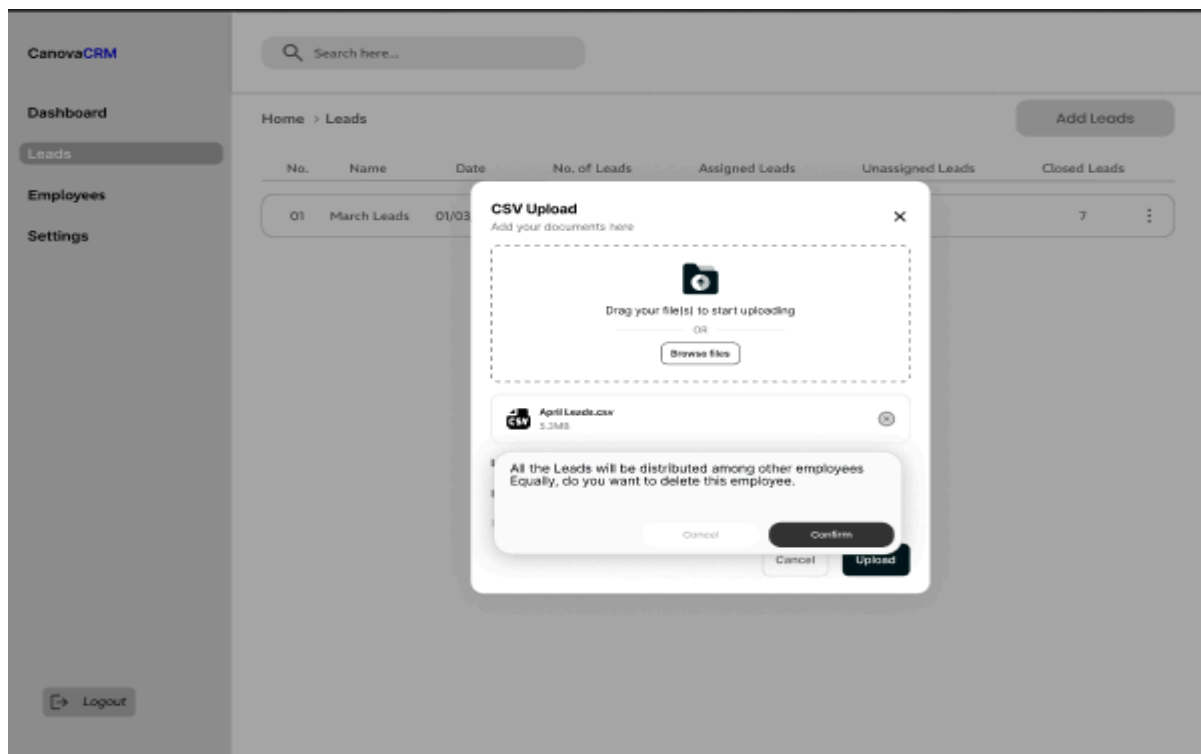
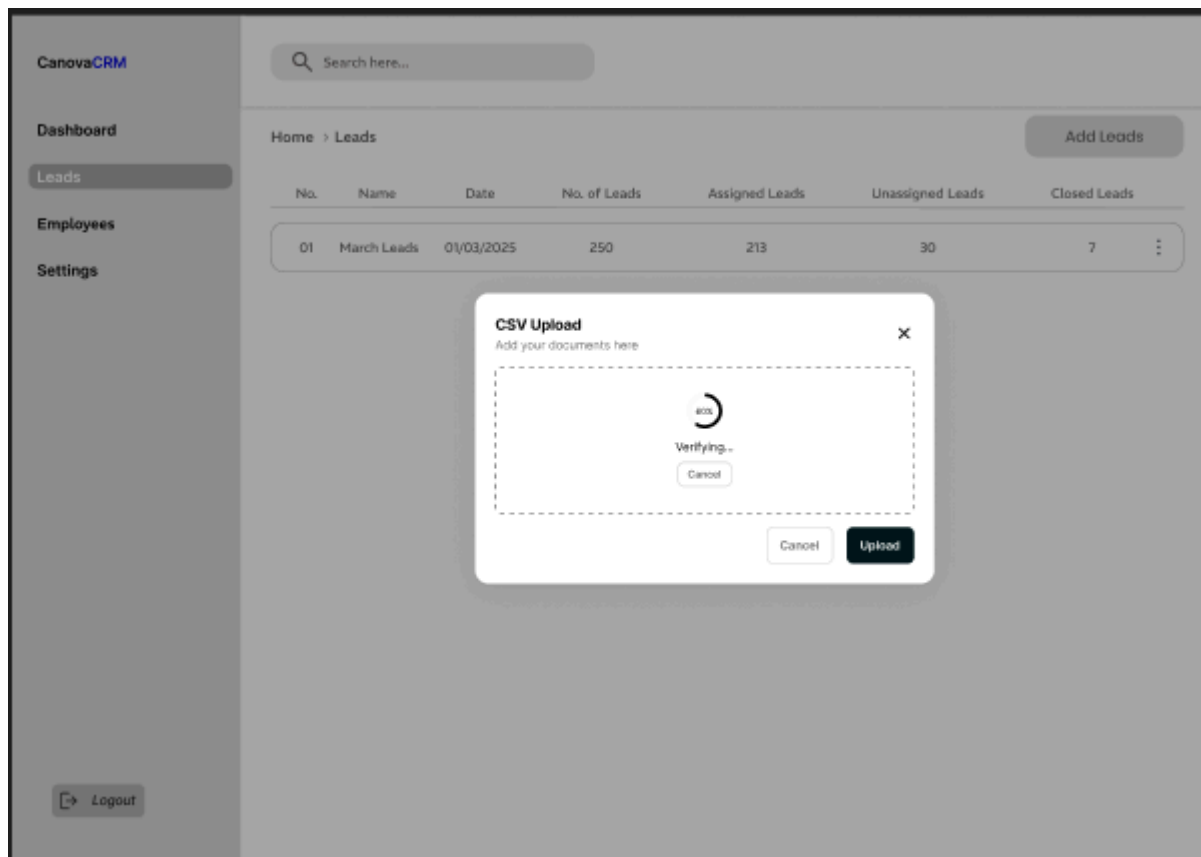
CSV Upload (with Drag & Drop + progress & verification)

7. Lead Distribution:
 - a. Equal distribution
 - b. Based on location/language preferences
 - c. Priority:
 - i. Language and Location Match
 - ii. Language or Location Match

Equal Distribution

```
Name,Email,Phone,Received Date,Assigned Employee
John Doe,john@example.com,9876543210,2025-06-10,
Jane Smith,jane@example.com,9123456789,2025-06-11,
Ravi Kumar,ravi.k@example.com,9988776655,2025-06-12,Anita Sharma
Meena Patel,meena.p@example.com,9090909090,2025-06-13,Sunil Gupta
Alex Johnson,alex.j@example.com,8811223344,2025-06-14,
```

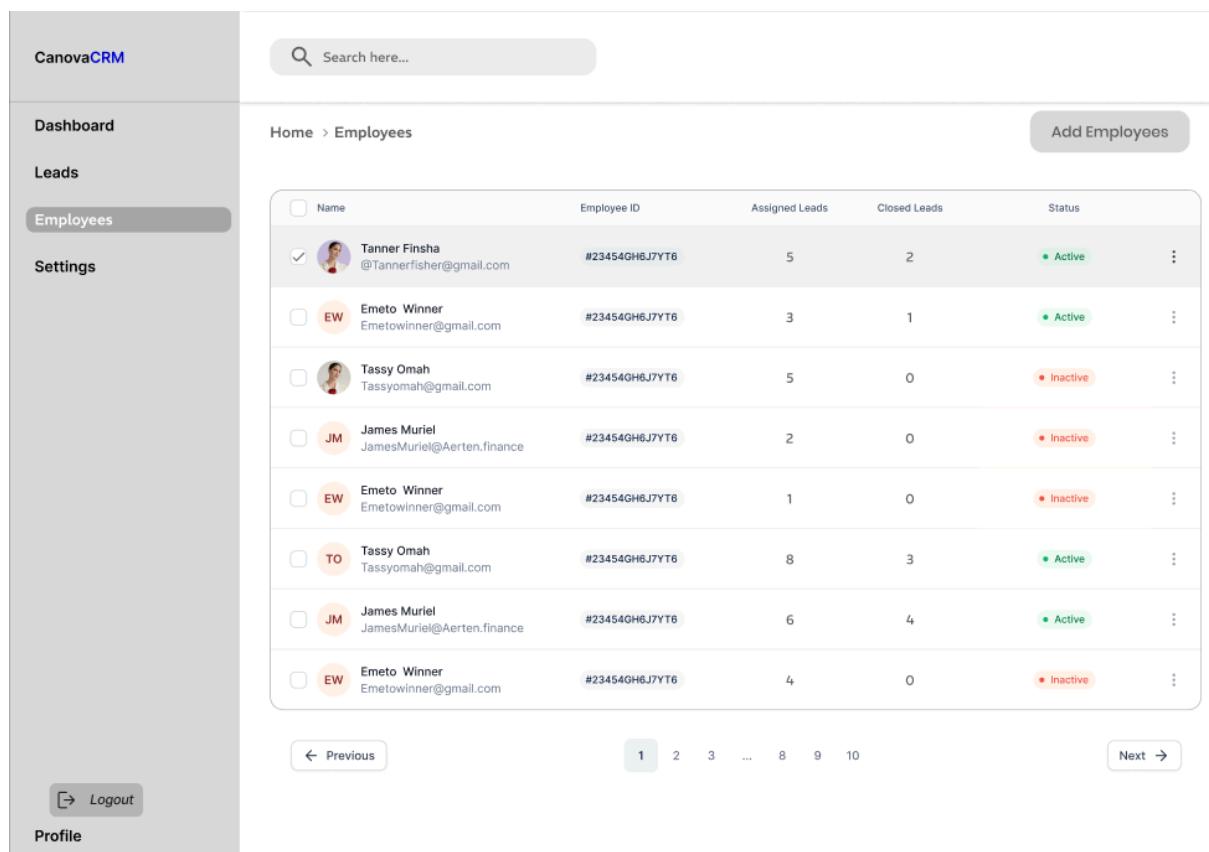
Page 04. 05



Design Corrections:

1. The conditions hidden in the design on page 05 below the modal with distribution rules **are to be omitted**.

Page 06, 07 , 08, 09

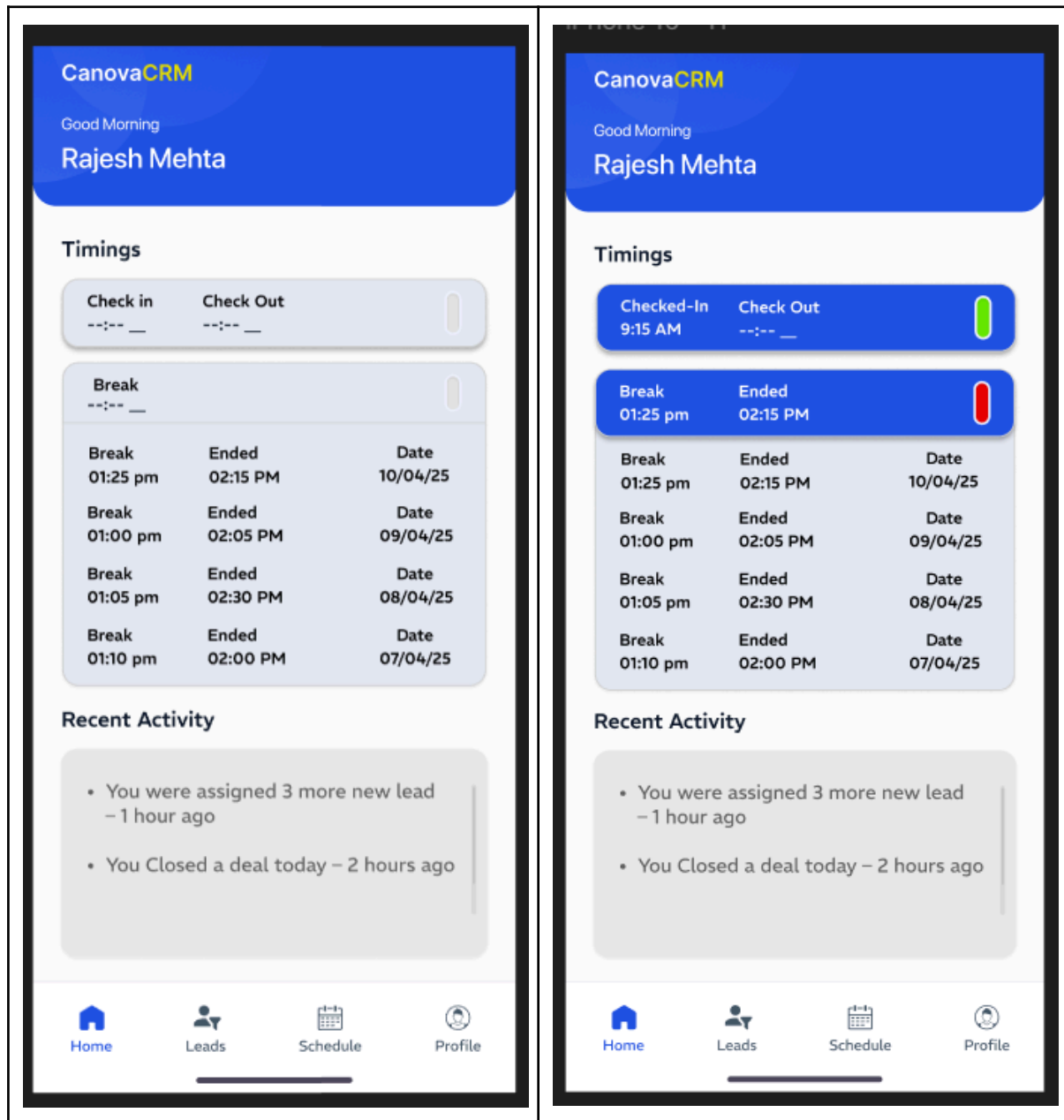


Design Details

1. The Bulk action UI needs to be removed.
2. The table should be paginated
3. Search should work with any search key that is part of Employee Information.
4. The Table information needs to be updated when refresh is clicked
5. On clicking the table column headers, it should sort the table in that page only. In ascending order, and if clicked again it should reverse the sort order.
6. The three dots will give options to delete and edit the employee.
7. The table should have new values once either of the two actions are performed.
8. The edit and the add employee will have the same UI.
9. The edit option will forbid the admin from changing the Language and Location.
10. When a new employee is added, their default password is their last name.

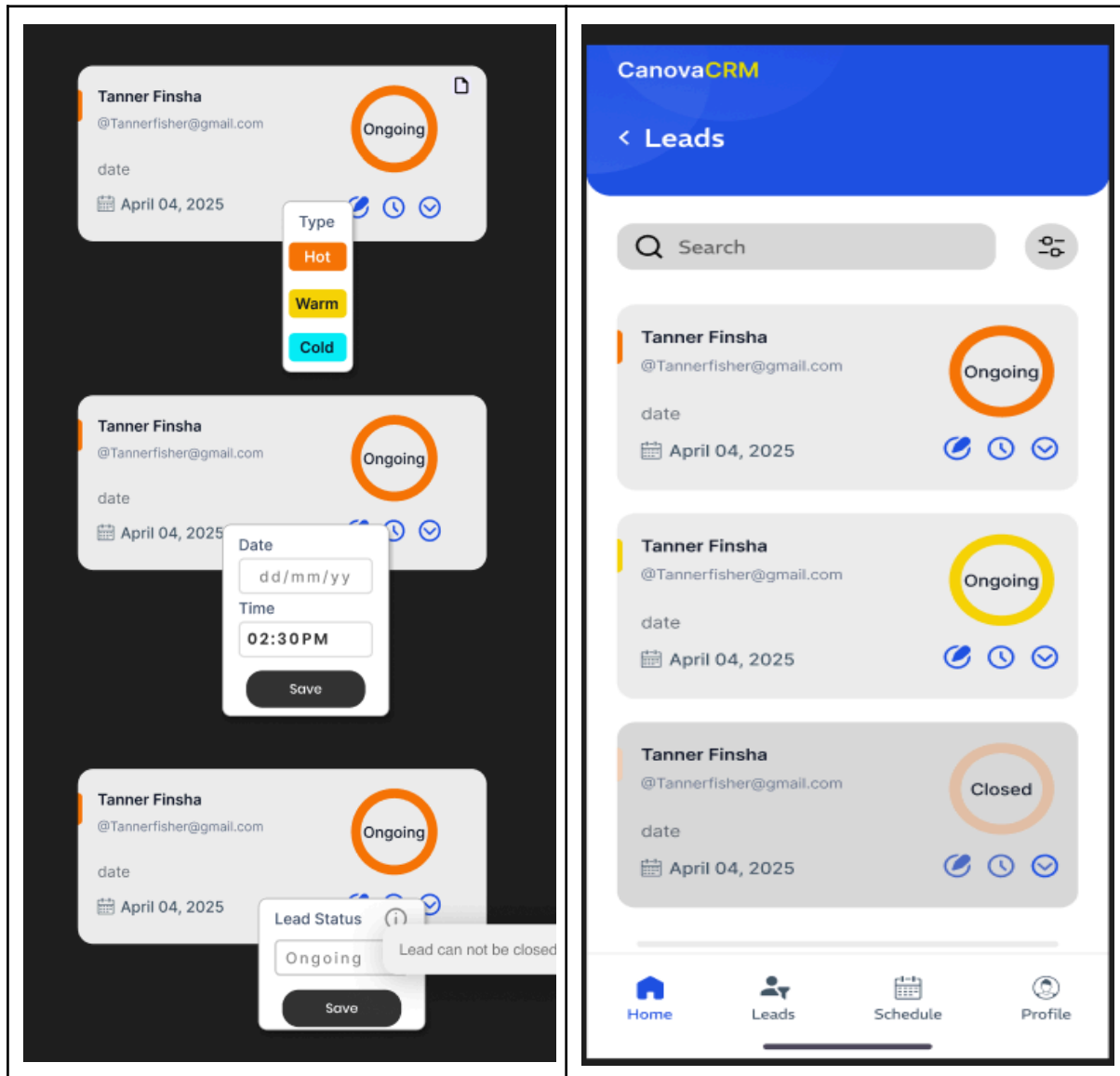
Role: Employee

Page 01, 02



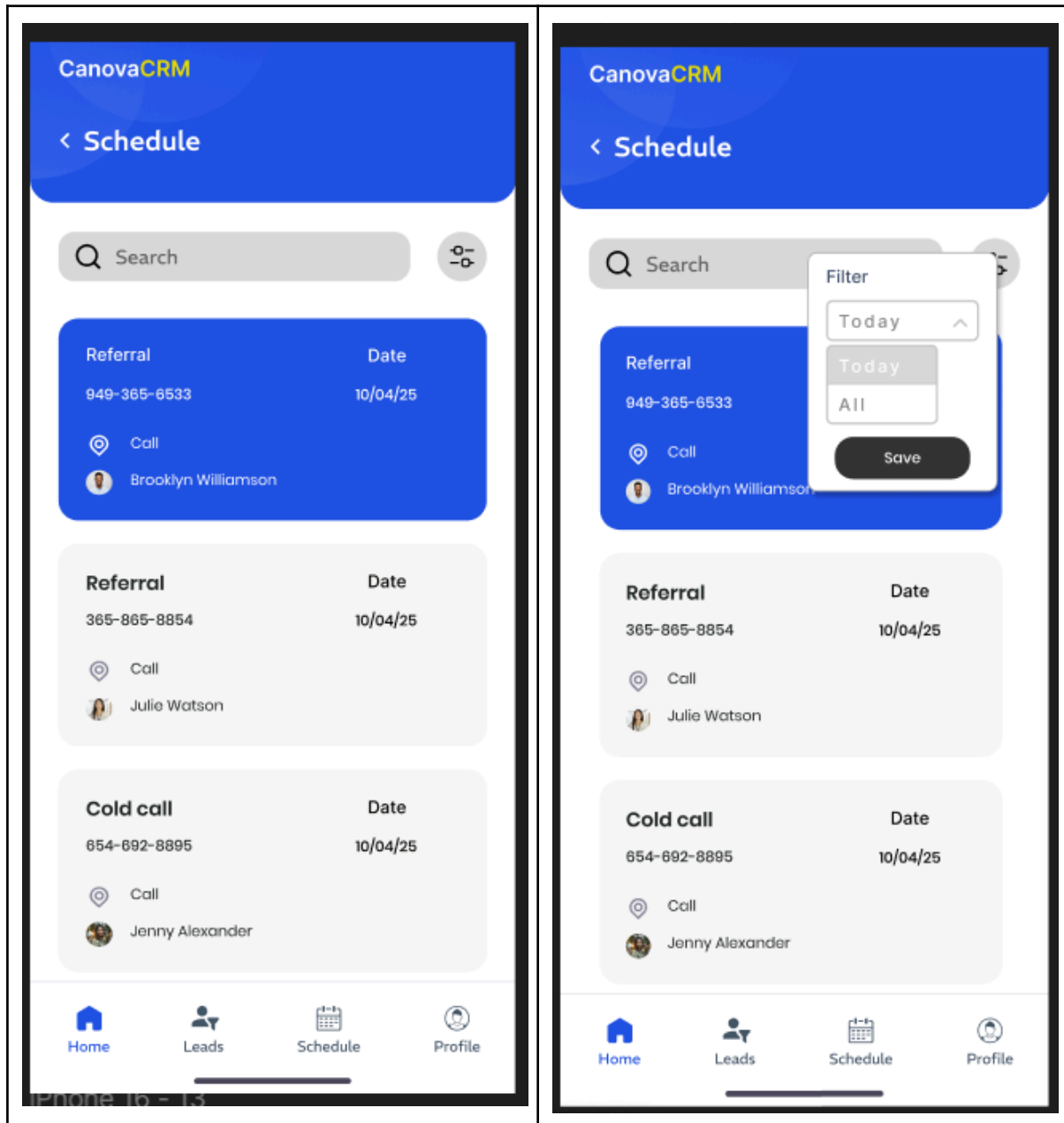
Design Details

1. The recent activity will be consisting of activities including assignment of a lead and closing of a lead, and will show the latest 10 activities.
2. The green indicators will be used for active and red for not active.
3. The employee will login using the default password, make a simple login page that will be responsible for login and maintenance of the session for an employee.



Design Details

1. Search should work with any search key that is part of Lead Information.
2. By default a lead is warm, and can be changed to hot or cold.
3. By default a lead is Open and can be closed.
4. A lead that is scheduled for future cannot be closed.
5. A lead whose schedule has already passed, can be closed.
6. Two leads cannot be scheduled at the same time window.
7. You can use the three buttons as shown to change the type, schedule and open or close a lead.
8. The leads can be filtered on the basis of OPEN / CLOSED
9. The lead section when opened, will show in blue like the home in the menu tab at the bottom of the screen.



Design Details:

1. A call that has been scheduled will show the type that is Cold call or Referral.
2. The filter will have the options showed in the design
3. Search should work with any search key that is part of LeadInformation.
4. The scheduled leads can be filtered on the basis of Today / all
5. The profile section will work as shown in the design.

Tech Stack

- Frontend: React + Vanilla CSS (Modular CSS only)
- Backend: Node.js + Express
- Database: MongoDB
- Deployment: Vercel/Netlify (Frontend), Render/Heroku (Backend)

Submission Checklist

- Pixel-perfect responsive UI (per Figma)
- Proper error handling (Frontend + Backend)
- Backend search, pagination, and filtering (No frontend search logic)
- CSV upload with verification
- Hosted frontend/backend with working live links

Evaluation Criteria

- Code quality & folder structure
- UI/UX consistency and mobile responsiveness
- Functional coverage of feature checklist
- Edge case handling, validations, error messaging
- Data accuracy & backend-driven logic