

ProspectPath System

LEAD AND DEAL MANAGEMENT APPLICATION
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SCOPE

- The Lead and Deal Management Application is a web application that will enable users to manage leads and manage deals. It will also provide administrative functions for managing sales agents.
- The system will support key functions such as lead management, deal management, and reporting.



SIGNIFICANCE

- By effectively managing leads, businesses can prioritize leads that are most likely to convert into customers.
- This prioritization ensures that sales efforts are focused on prospects with higher potential, thereby improving conversion rates.



DEFINITION

Agent: Any individual who uses the Lead and Deal Management Application to manage leads and track deals.

Admin: An individual who uses the Lead and Deal Management Application to manage agents, leads, and deals.

Lead: A potential customer or client.

Deal: A business opportunity tracked through its various stages.

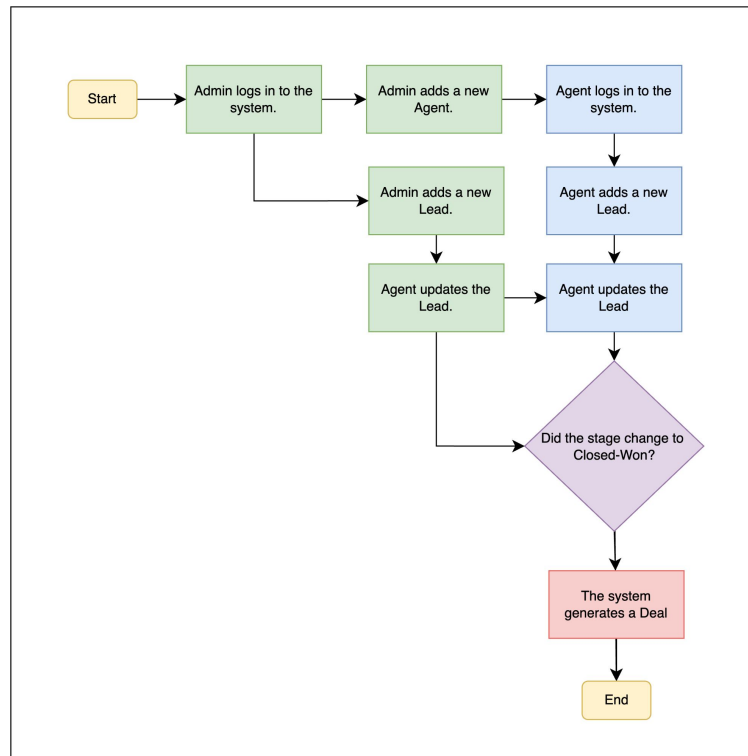


FEATURES

- The system will provide an interface showing a list of leads, agents, and deals.
- The system will provide an interface for adding, editing, deleting agents, leads, and deals.
- The system will allow users to filter and search agents, leads, and deals.
- The system will auto-generate deals based on the stage of the lead.
- The system will store information for each agent, including name, email, password.
- The system will store information for each lead, including name, email, phone number, agent, and stage.
- The system will store information for each deal, including name, email, phone number, agent, and deal value.



WORKFLOW



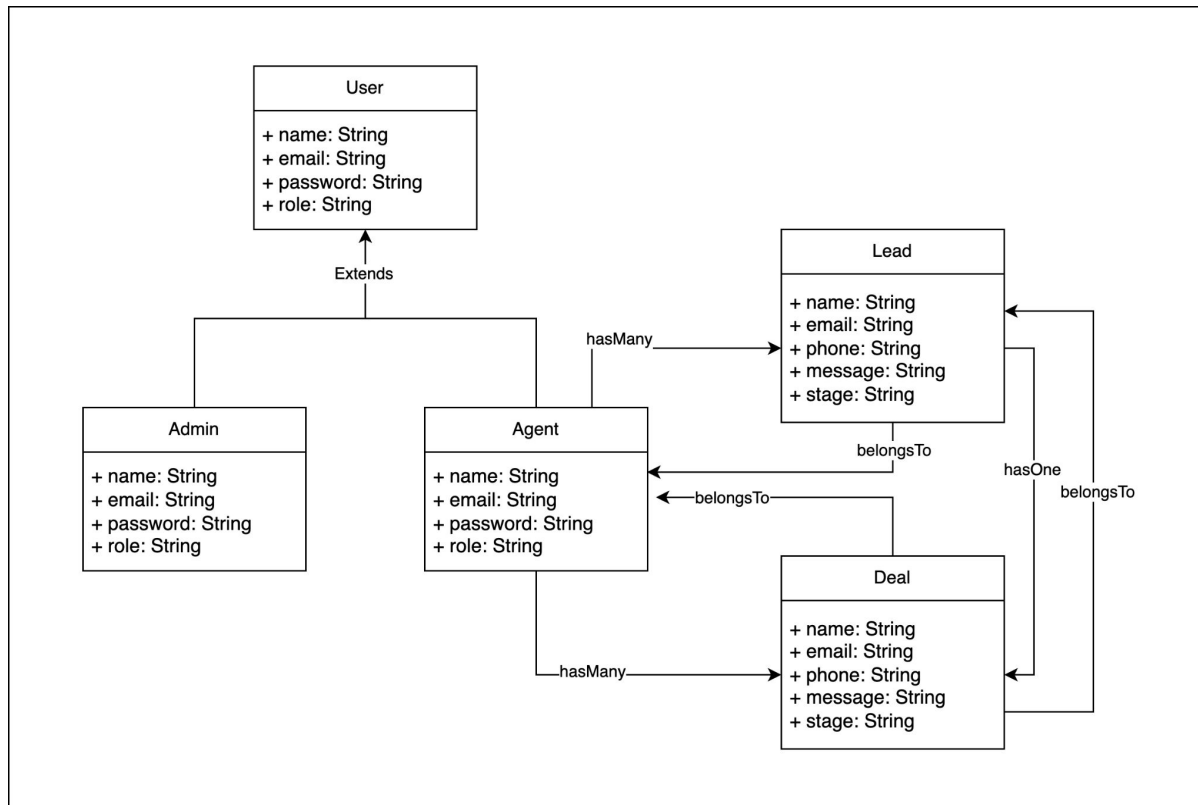


BUSINESS RULES

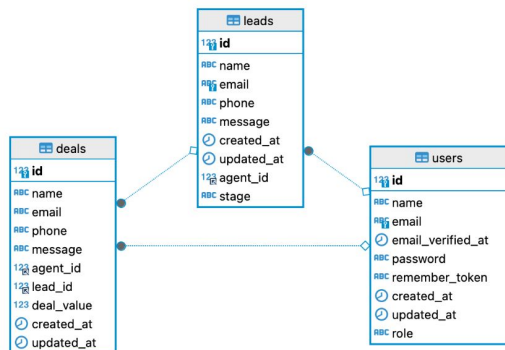
- The system will enforce user permissions, ensuring only admins can add, edit, delete agents.
- The system will not allow duplicate agents based on email addresses.
- The system will not allow duplicate leads based on email addresses.
- The system will ensure that only the assigned Agent can view, edit, and delete leads and deals.
- The system will ensure that lead, agent, and deal information is complete and valid before saving.
- The system will validate email address and phone number for correct format.



CLASS DIAGRAM



ER DIAGRAM



cache
key
value
expiration

cache_locks
key
owner
expiration

migrations
id
migration
batch

password_reset_tokens
email
token
created_at

sessions
id
user_id
ip_address
user_agent
payload
last_activity

failed_jobs
id
uuid
connection
queue
payload
exception
failed_at

jobs
id
queue
payload
attempts
reserved_at
available_at
created_at

job_batches
id
name
total_jobs
pending_jobs
failed_jobs
failed_job_ids
options
cancelled_at
created_at
finished_at

PRESENTATION OF THE PROJECT

