CRM PDF – Infographic Content

Title: Founders Workspace – CRM System
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Page 1: Cover Page

Title: Founders Workspace CRM
Subtitle: Smart Lead Management. Simple Team Workflow.
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Page 2: CRM System – Overview

Founders Workspace CRM is a lead and customer relationship management system designed for startups, agencies, and enterprises. It helps organize leads, assign agents, schedule meetings, and close deals faster — all from one centralized platform.

User Roles:

- **Admin** – Manages users, leads, and system settings
- **Agent** – Handles assigned leads, tasks, and meetings

Page 3: Signup & Dashboard Flow

Landing Page:

- Highlights CRM features
- "Get Started Free" button for new users

Admin Signup Process:

- Enter name, email, address, password
- Email verification link to activate account
- Redirected to dashboard after login

Dashboard Overview:

- Total Leads
- Total Agents
- Today & Upcoming Calls

- Today & Upcoming Meetings
- Analytics & Calendar
- Quick Action Buttons (Add Lead, Schedule Meeting)

Page 4: Lead & Agent Management

Lead Management Features:

- Add manually or bulk import leads
- Fields include: Name, Email, Company, Job Title, Industry
- Meeting info, PRL score, comments
- Filter & search options for smart navigation

Agent Management:

- Create/Edit agents
- Assign designation and contact details
- Monitor activity and login status
- Deactivate inactive agents

Page 5: Assigning Leads & Managing Tasks

Assign Leads:

- View assigned/unassigned leads
- Select agent + lead range
- One-click assign feature
- Track assignments by agent

Task Management:

- Create tasks with title, description, start/end dates
- Set priority & status
- Assign to specific agents
- Track progress: Pending | In Progress | Completed

Page 6: Meetings & Deal Management

Meeting Scheduler:

- Schedule meetings with leads or agents
- Set title, time, duration, and reminders
- Status: Scheduled | Completed | Cancelled
- View all meetings in dashboard calendar

Deal Management:

- Link deals to leads and agents
- Fields: Deal name, company, amount, closing date
- Track stage, status, and notes
- Edit/update deals as needed

Page 7: Role-Based Access & Agent Dashboard

Agent Login:

- Access limited dashboard
- View assigned leads, tasks, meetings

Agent Tools:

- LMS Assistant (voice-based help)
- Calendar View for meetings/tasks
- Real-time notifications for assignments

Role-Based Access Controls:

- Admin: Full access (add/edit/delete/assign)
- Agent: View and act only on assigned items

Page 8: Appearance, Notifications & Experience

User Personalization:

- Toggle Light/Dark mode
- Edit user profile info

Notifications:

- Alerts for tasks, meetings, and new assignments
- Clickable calendar entries

Leads Overview Page:

- Tabular lead view
- Quick action buttons: Edit, Delete, Communicate
- Search, filter, and sort options