USER STORY ID	As a <type of user>	I want to <perform some task>	so that I can <achieve some goal>	Acceptance Criteria	Edge Cases	Assigned To	Story Points	Start date	End date	Status
Feature 1 :- Pipeline Analytics Dashboard										
1	Salesperson/Accounts Manager	See real-time updates on the dashboard	Understand the pipeline changes	Auto-refresh page Provide manual refresh button Update within 30 seconds of data changes	Indicate when using stale/cached data - Show offline status during connection issues - Handle server timeouts gracefully - Prevent refresh during user input/interaction		3			
2	Salesperson/Accounts Manager	See visual charts on the dashboard	Quickly assess deal progress trends.	- Implement bar chart visualizing Open Pipelines Amount by Stage. - Implement bar chart visualizing Revenue Won by Month showing deal value grouped by closing date. - Add interactive elements (hover	- Handle extreme data outliers with appropriate scaling - Use patterns/labels for accessibility (not just colors) - Display placeholders when chart data is loading - Show simplified charts on small screens		3			
3	Salesperson/Accounts Manager	See a list of top companies based on the number and amount of deals won	identify high-value clients and understand which companies are contributing most to revenue	- Dashboard must display the top 6 companies based on E6the total deal amount won. - Each company listed must show the total value and number of deals won.	- Amounts must be formatted correctly with currency and separators (e.g., ₹1,00,000). - Tie between companies: If multiple companies have the same amount, list all tied companies up to the maximum display limit (e.g., top 6).		2			
4	Salesperson/Accounts Manager	View key metrics for open, won, and lost pipelines and revenue this month,	quickly assess performance and track trends with visual indicators.	- Displays the count of all deals currently open and not yet closed this month. - Displays count of deals closed as "won" within the current month. - Displays count of deals marked as	- If there are no pipelines in a category for this month, show “0” . - Pipelines should be filtered by the actual close date within the current month. - If previous month’s value is 0, prevent		2			
Feature 2 :- Pipeline Overview										
1	Accounts Manager	See real-time updates on the dashboard	Understand the pipeline changes	- Auto-refresh page - Provide manual refresh button - Show last-updated timestamp - Update within 30 seconds of data changes	Indicate when using stale/cached data - Show offline status during connection issues - Handle server timeouts gracefully - Prevent refresh during user input/interaction		3			
2	Account Manager	View a visual summary of pipeline analytics	Monitor the overall status of assigned deals	- Display deals grouped by pipeline stages - Show deal count for each stage - Implement responsive design for all devices - Ensure dashboard loads within 5 seconds	- Show empty stages with "0" count - Handle connection loss with retry mechanism - Prevent data leakage across user roles - Display appropriate message for incomplete data					
3	Account Manager	Filter string-based columns using specific conditions,	easily find deals matching certain text.	- Each column provides a search filter icon to open condition options. - Filter options include: Contains, Does Not Contain, Starts With, Ends With, Equals, Does Not Equal. - Table updates instantly upon applying a filter. -Filtering updates the table instantly without needing a page refresh. -Works across Deal Name, Salesperson, Stage, etc.	-“"No match” state shows empty table with “No data.” - If input has unsupported characters → show inline warning.		2			

	4	Account Manager	Filter numeric and date fields using comparison options,	analyze deals within specific ranges.	- Columns like Amount and Date show filter options with:Does Not Equal, Less Than, Greater Than, Less Than or Equal To, Greater Than or Equal To, Between (for range selection), Reset. -"Between" shows two input fields (e.g., date pickers or amount range). - Filters instantly apply to the table on selection. - Format validations (e.g., date must be valid) are enforced.	- If user enters invalid date format → show clear error message and prevent filter submission. - "Between" filter with only one input filled → show prompt to complete both.		2			
	Feature 3 :- Pipelines										
	1	Salesperson	See my deals categorized under various sales stages,	track their current position in the sales process.	- Each column represents a stage: Qualification, Need Analysis, Proposal/Price Quote, etc - Each column header shows: total deal value in that stage and total deal count in that stage. - Deal cards under each stage show: Deal name, amount, company name, percentage, DU Name, close date, region.	- No deals in a stage → Show "0 Deals" with empty card area. Region or DU Name is missing → Show "N/A" or leave blank.		3			
	2	Salesperson	move deals between stages using drag-and-drop,	update their progress efficiently.	- Dragging a deal card and dropping it in another column updates its stage. - Stage totals update accordingly. - Deal history/log tracks stage changes.C16	- Deal dropped in invalid area → Revert to original position. - Network error during stage update → Show error toast/snackbar. - User drops multiple deals rapidly → System queues and processes them correctly.		2			
	Feature 4 :- Deal Creation and Custom field										
	1	Salesperson	Create new deals with all mandatory fields	track each business opportunity.	- Clearly mark mandatory fields. - Validate fields in real-time with visible feedback - Show success confirmation after submission - Inline error messages appear near the empty or invalid required field (e.g., "This field is required"). - Form submission is blocked until all required fields are correctly filled.	- Preserve form data during connection loss - Auto-save draft during prolonged form completion - Handle browser refresh without data loss - Block duplicate submission attempts - If all required fields are missing, system lists all errors simultaneously, not one-by-one. - If user starts to fill a required field and then clears it, validation re-triggers immediately. - Optional fields are not validated unless they have conditional logic applied.		2			
	2	Salesperson	Add custom fields with specific data types	capture additional information relevant to my particular business contexts.	- Support multiple data types (text, date, number, Accounts Managerlean) - Provide appropriate input controls for each type - Allow setting default values for custom fields - Show custom fields in logical form sections	- Handle naming conflicts with existing fields - Mark existing deals with "Not Set" for new fields - Limit maximum custom fields to prevent form overload -Handle migration if field type changes		5			

	3	Salesperson	System to validate deal entries and prevent duplicates	avoid redundant data.	- Check for similar customer and deal names - Show warning with details of potential duplicates - Allow proceeding or canceling after warning - Run duplicate check before final submission	- Indicate "possible duplicate" for partial matches - Allow submission if duplicate check fails - Handle high-latency duplicate checking - Show "creating anyway" reason in audit log		2			
	Feature 5 :- Deal Edit and Update										
	1	Salesperson	edit deal information	update details as negotiations progress.	- Allow stage updates from deal detail view - Support drag-and-drop in pipeline view - Clearly indicate current stage in all views - Require minimal clicks for stage changes	- Handle deprecated/removed stages gracefully - Prevent forbidden stage jumps - User tries to close the edit modal with unsaved changes in required fields → show confirmation dialog.		2			
	2	Salesperson/Accounts Manager	view a complete history of changes made to any deal	Understand stage progression	- Record timestamp for every stage change - Show complete stage progression history	The stage progression update should be reflected in the system within a few seconds of the change.		2			
	3	Salesperson	update multiple deals	manage the pipeline efficiently	- Show updated company and pipeline counts for all affected deals. - Data should refresh on update within 10 seconds. - Responsive design for bulk update interface	- Show "none selected" if no deals are selected for bulk update. - Avoid stale data if some updates fail.		2			
	Feature 6 :- Deal Stage View and Update										
	1	Salesperson	clearly see the current stage of each deal	know exactly where it stands in the sales process	- Show updated company and pipeline stage count. - Data should refresh on update after stage change. - Responsive design for stage	- Show "0" if no valid next stage is available. - Avoid stale data if stage change is rejected.		2			
	2	Salesperson	update a deal's stage with a simple action	quickly reflect progress.	- Show updated company and pipeline stage count after stage change. - Data should refresh on update within 5 seconds. - Deal card should be drag and droppable to another stage. - Responsive design for stage update action like drag and drop - Clear UX with a single-click or single-selection option to change stage	- Interrupted update due to network issue → show: "Update failed. Please try again." - Drag-and-drop not supported on mobile → fallback to dropdown selection.		2			
	3	Salesperson	be prompted to complete stage-specific required fields	ensure all necessary information is captured before progressing.	- Identify stage-specific required fields - Prompt for missing fields during stage change - Allow direct completion from Prompt	- If field validation fails, user is kept in edit mode with visual cues. -Required field is initially filled but then cleared → prompt user to re-enter before saving. -User enters special characters in a text field where only alphanumeric input is expected → show tooltip or helper text immediately.		2			

	Feature 7 :- Deal Filtering										
	1	Salesperson/Accounts Manager	filter deals by multiple criteria simultaneously	precisely target specific deal subsets	- The system should support filtering by multiple criteria at once (e.g., stage + value + region). - Filtered results should update dynamically without page reload.	- If no deals match the filter, show a “No results found” message with a “Reset Filters” button. - Applying too many filters resulting in >10 seconds delay should trigger: “This may take a while. Continue?” - Removing a field from filter config that has been deprecated should show a warning and auto-remove. - Browser refresh should retain filter state (session storage or URL encoding).		3			
	2	Salesperson/Accounts Manager	export filtered data sets in multiple formats	perform further analysis outside the system.	- Allow export of filtered deal data in at least two formats: CSV and XLSX. - Export should match the currently applied filters and visible columns. - Export button should be enabled only if there are results to export.	- Exporting a large dataset (>1000 rows) prompts: “This may take a while. Do you want to proceed?” - If export fails (e.g., timeout or backend issue), show retry modal: “Export failed. Retry or contact support.” - If export is attempted with no filters and no results, disable export and show tooltip: “Apply filters or view data to export.”		3			
	Feature 8 :- Company List Management										
	1	Salesperson	view and filter companies linked to my deals	quickly access relevant company details.	- The Company dashboard should display a section listing companies tied to my deals. - Should include columns: Company Name, Company Website, and Company Phone Number and Status. - Each column is populated with accurate data from the CRM Database. - The company page displays a tabular list of companies when accessed by a salesperson. - Each row represents a unique company with accurate data from the	-No companies are linked to the SalesPerson deals → Show a fallback message like “No companies found for your deals.” -The company list should update instantly to reflect the change. -Company data is partially missing (e.g., phone number not provided) → Show placeholders like “N/A”. -Same company linked to multiple deals → Appear only once in the list to avoid duplicates. -Ensure dashboard reflects live or recent information without requiring a		3			
	2	Salesperson/Accounts Manager	see company name, website, phone number, and status in a structured format	I don’t need to navigate away for basic info.	- Each row contains correctly formatted website URLs. - Phone numbers should be visible and dialable. - Should be able to select all companies or specific company data row	-Invalid or missing website URL → Show “N/A” or a warning icon and prevent it from being clickable. -Missing phone number → Display “Not Available” or gray out the phone icon/link. -Special characters or encoding errors → Sanitize and validate all data before display. -Salsperson has no companies assigned → Display message like “No company information available yet.”		2			

	3	Accounts Manager	see and filter all companies linked to deals across all Salepersons	monitor company engagement.	- The Company dashboard should display companies across all Salespersons. - Shoud includes columns: Company Name, Company Website, and Company Phone Number, Owner, Status. - All companies associated with any Salesperson's deals are shown, fetched from the CRM Database. - Data in each column matches the CRM Database records.	-No companies linked to any deals yet → Show a message: "No company records found." -Duplicate companies across Salespersons → Ensure each company is listed only once, or provide an indicator of how many Salespersons it's associated with.- -Missing website or phone number → Show "N/A" in the corresponding column. -Invalid website links or non-standard phone numbers → Validate and sanitize before rendering. -High number of companies (performance concern) → Implement lazy loading or pagination to maintain smooth UX.		2			
	4	Salesperson/Accounts Manager	ompany page to have a responsive view of company details	access information on any device.	- On desktop (> 576px), the company page shows a table with columns: Company Name, Company Website, Company Phone Number, and Status (plus Assigned Salesperson for accounts managers), supporting sorting by headers. - On mobile (≤ 576px), the page switches to a card view, each card showing Company Name, Company Website, Company Phone Number, and Status (plus Assigned Salesperson for accounts managers), with a tap to expand for more details (e.g., creation date). - Both views support pagination with 10, 20, or 50 companies per page and navigation controls (e.g., Previous/Next buttons). - Filtering and search functionalities	- Small Desktop Screen: On a desktop with a narrow window (e.g., 600px), the table view remains functional without horizontal scrolling issues. (Test: Resize window to 600px and verify usability.) - Very Small Mobile Screen: On a mobile device with a 320px width, the card view remains readable, with text wrapping appropriately. (Test: Use a 320px viewport and verify readability.) - No Companies: Both table and card views show "No companies found" if there are no companies. (Test: Clear the database and verify the message in both views.) - Orientation Change: Switching a mobile device from portrait to landscape (or vice versa) updates the card layout correctly. (Test: Rotate a		3			
	Feature 9 :- Company Summary Tiles										

	1	Salesperson	see a tile showing my total company count, count of active companies and count of inactive companies.	measure my current performance.	The dashboard must display a tile containing: -Total number of companies assigned to the Salesperson -Total number of active and inactive companies -The data should update in near real-time or upon dashboard refresh. -The counts must be accurate based on the latest deal and company data. -Each count must be visually separated and clearly labelled. -Values must be numerically formatted for readability -Tiles should be mobile responsive and display well on smaller screens. -The tile must not be accessible or visible to users who are not Salespersons.	-No companies or deals exist for the Salesperson → The tile should display 0 in all segments. -Data mismatch (e.g., company assigned but not linked to a deal) → Only accurately linked data should be counted. -Large volume of data (e.g., 10,000+ entries) → Ensure performance is optimized and numbers are correctly formatted. -Incorrect role access → Accounts Manager or other users shouldn't see this tile. -Data temporarily unavailable (e.g., network delay) → Show a loading spinner or temporary message like "Loading data…"		2			
	Feature 10 :- Company Summary Tiles										
	1	Salesperson/Accounts Manager	view, filter, and group contact details	follow up on recent opportunities promptly.	- The contact page displays a tabular list of contacts with columns: Name, Email, and Phone Number, with a column chooser for additional columns (e.g., Company Name, Last Interaction Date). - Clicking a row expands it to show additional details (e.g., company name, last interaction date). The table supports sorting by column headers, pagination with 10, 20, or 50 contacts per page, and a search bar for filtering by Name, Email, or Phone in real-time. - Contacts can be filtered by multiple criteria (e.g., company, last interaction date), with results updating in real-time and a "Reset	- No Contacts: The table shows "No contacts found" or empty list if none exist. (Test: Clear the database.) - Incomplete Data: Missing fields (e.g., phone) display as "N/A". (Test: Add a contact with missing data.) Large Dataset: With 10,000+ contacts, the table loads the first page within 2 seconds. (Test: Populate 10,000 contacts.) - No Filter Matches: Filtering with no results shows "No contacts found matching the selected criteria." (Test: - - Apply filters with no matches.) - Unassigned Contacts: Unassigned contacts appear under an "Unassigned" group for accounts managers. (Test: Add an unassigned		2			

	2	Salesperson/Accounts Manager	I want the contact page to have a responsive view of contact details, with a table on desktop and cards on mobile	access information on any device.	- On desktop (> 576px), the contact page shows a table with columns: Name, Email, and Phone Number, supporting sorting by headers. - On mobile (≤ 576px), the page switches to a card view, each card showing Name, Email, and Phone Number, with a tap to expand for more details (e.g., company name). - Both views support pagination with 10, 20, or 50 contacts per page and navigation controls. The layout transitions smoothly when resizing the browser window.	- Small Desktop Screen: At 600px, the table remains functional without scrolling issues. (Test: Resize to 600px.) - Very Small Mobile Screen: At 320px, the card view remains readable. (Test: Use a 320px viewport.) - No Contacts: Both views show "No contacts found" if none exist. (Test: Clear the database.) - Orientation Change: Mobile device rotation updates the card layout correctly. (Test: Rotate device.) - Slow Network: A loading spinner displays until contacts load. (Test: Throttle network to 2G.)		2			
	Feature 11 - Export Functionality										
	1	Salesperson	export filtered company and contact lists in XLSX or CSV format	I can analyze the data in detail.	- A clearly labeled export button is visible on the screen where the company list is displayed. - When the button is clicked, a CSV file is generated containing the full list of companies currently displayed. -The CSV file includes a header row with appropriate column names	-The user clicks "Download CSV" when there are no companies in the list → CSV file is still generated with only the headers and no rows and the user is shown a message "No companies to export". -Some company names contain non-English characters →File encoding (e.g., UTF-8 with SalespersonM) ensures characters display correctly in		3			
	Feature 12 - Document attachement										
	1	Salesperson	upload, download attachments for a deal record	keep all relevant documentation in one centralized location.	-Users will be able to upload and attach files of different format like .pdf,.xls and .docx. -Users will also be able to download the attached documents	-System should reject upload of files by user if the file is of an unsupported format. -If a user tries to download an attachment that has been deleted, an		5			
	2	Salesperson	securely delete attachments from a deal record	remove outdated or incorrect information.	-Only authorized users can delete attachments and update deal records.	-A user's role has changed, altering their permissions, but they attempt actions based on their previous role. -System should dynamically check permissions based on the current role and deny unauthorized actions.		2			
	Feature 12- Mobile Accesibility										

	1	Salesperson/Accounts Manager	have all pages automatically adapt to smartphone screen size	view critical business information while not having access to a pc	-All pages must use responsive design techniques to adapt to various screen sizes, including smartphones by ensuring that elements such as text, images, and buttons resize and reposition appropriately. -Provide a seamless and intuitive user experience on mobile devices.	-Users access the site on devices with extremely small screens (e.g., smartphones) or very large screens (e.g., large desktop monitors) so must ensure that the design adapts appropriately without losing functionality or readability. -When Users zoom in or out on the page, it must be ensured that the layout remains functional and elements do not overlap or become inaccessible.		5			
	2	Salesperson/Accounts Manager	have the navigation menu to transform into a toggle menu	easily access different sections without cluttering the screen	-The navigation menu should transform into a toggle menu on smaller screens. -The toggle menu should adapt to different screen sizes and	-Users access the site on extremely small screens or very large screens so must ensure the toggle menu remains functional and accessible on all screen sizes.		5			