ILP Project Presentation - Interim Review

PROJECT MANAGEMENT WEEK4 WEEK3 WEEK2

02 June 2025



Project Details

PROJECT NAME	XLead – Customer Relationship Management
PROJECT START DATE	28 April 2025
PROJECT TEAM AND ROLE	Meera M (Scrum Master) Abhiram M Prasad Bhagya Unnikrishnan Dhanya P Harinand S
PROJECT TEAM LEAD	Sagar S Abraham
TECHNOLOGY – BACKEND & VERSIONS	.NET Core 6.0
TECHNOLOGY – FRONTEND & VERSIONS	Angular 15.0
DATABASE	Sql Server
TOOLS USED	Jira (Project Management), Git (Version Control)
CUSTOMER (POC)	Pratheesh Kumar, Subhash K Joseph
MENTOR	Sreelekshmi G
BUSINESS ANALYST	Catherine Mary Mathew



Project Details

PROJECT NAME	XLead – Customer Relationship Management	1
PROJECT GUIDE	Suneesh Thampi, Lekshmi Ashokan	
PERCENTAGE OF COMPLETION	80%	
EXPECTED COMPLETION DATE (TENTATIVE)	10 June 2025	
EXPECTED DEPLOYMENT DATE	14 June 2025	



Objective

- Develop and deliver XLead CRM
- Centralized platform for Sales team
- User-friendly, intuitive interface design
- Streamlines deal tracking and management
- Simplifies related data handling tasks
- Provides insights through analytics tools

Scope

- · Deal creation and status tracking
- Customer and company data management
- User-specific role-based permissions
- Dashboard with real-time deal insights
- Document upload and file storage
- Filtering, export, and reporting tools



WORKFLOW Salesperson **CRM SYSTEM Pipeline Analytics Pipeline** Company **Contact** Revenue Won by Month • View all Companies Create Deal View All Contacts **Count of Contacts Count of Companies** Open Pipelines by Stage Add Deal to **Current Month Pipeline** Apply Filter and Count of Active Pipeline Change Deal Stage Export data Companies **Status Update Deal** Count of Inactive List of Top Companies Monthly Open Pipeline Companies Apply Filter and Export Stages



data

WORKFLOW Accounts Manager CRM SYSTEM Pipeline Company **Contact Pipeline Analytics Overview Overview Overview** Company List **Revenue Metrics** Deals by Stage **Contact List Company Information** Sales Person **Active Deals** Contact Company status **Lost Deals** Information Assignments Filter & Export Performance KPI's Team Performance Activities

Filter & Export

Filter & Export



User Roles and Functionalities

Salesperson

Privileges:

- View dashboard and metrics based on deals under them.
- View, create, update and delete deals in the pipeline stage.
- View, create, update and delete company and contact details for deals assigned to them.
- Export company, contacts and deal information in .csv & .xlsx formats.
- View the history of a deal.

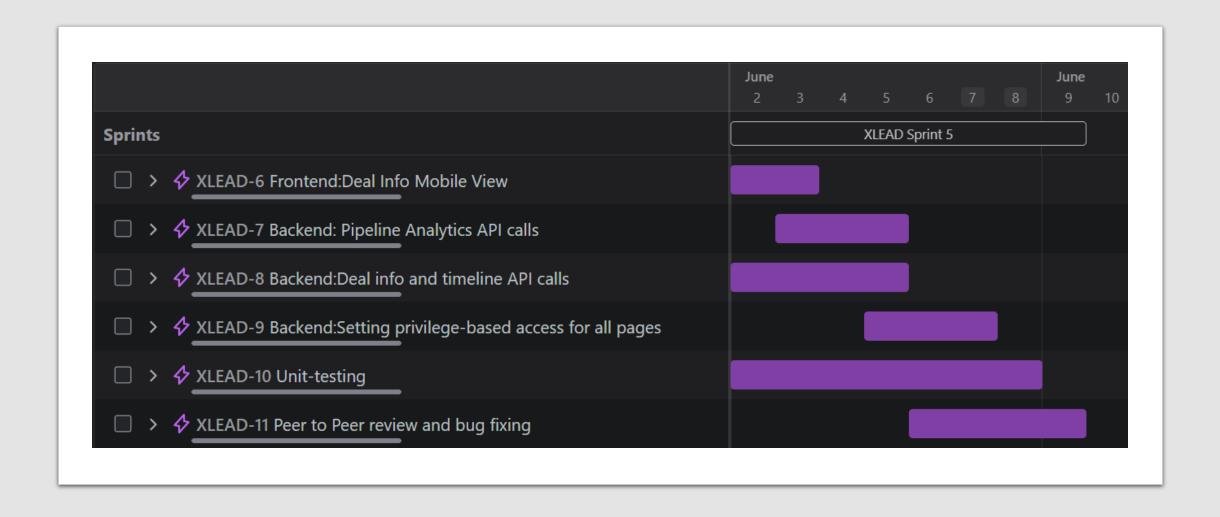
Accounts Manager

Privileges:

- View performance metrics and analytics for all deals managed by sales team members.
- Access detailed deal records organized by individual sales representatives.
- View complete company and contact information related to each salesperson's deals.
- Export deal records with associated company and contact details to CSV or Excel formats.



Future Enhancements - Gantt Chart



DEMO



Thank you

