

ILP Project Presentation - Interim Review

02 June 2025



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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
PROJECT GUIDE	Suneesh Thampi, Lekshmi Ashokan
PERCENTAGE OF COMPLETION	80%
EXPECTED COMPLETION DATE (TENTATIVE)	10 June 2025
EXPECTED DEPLOYMENT DATE	14 June 2025

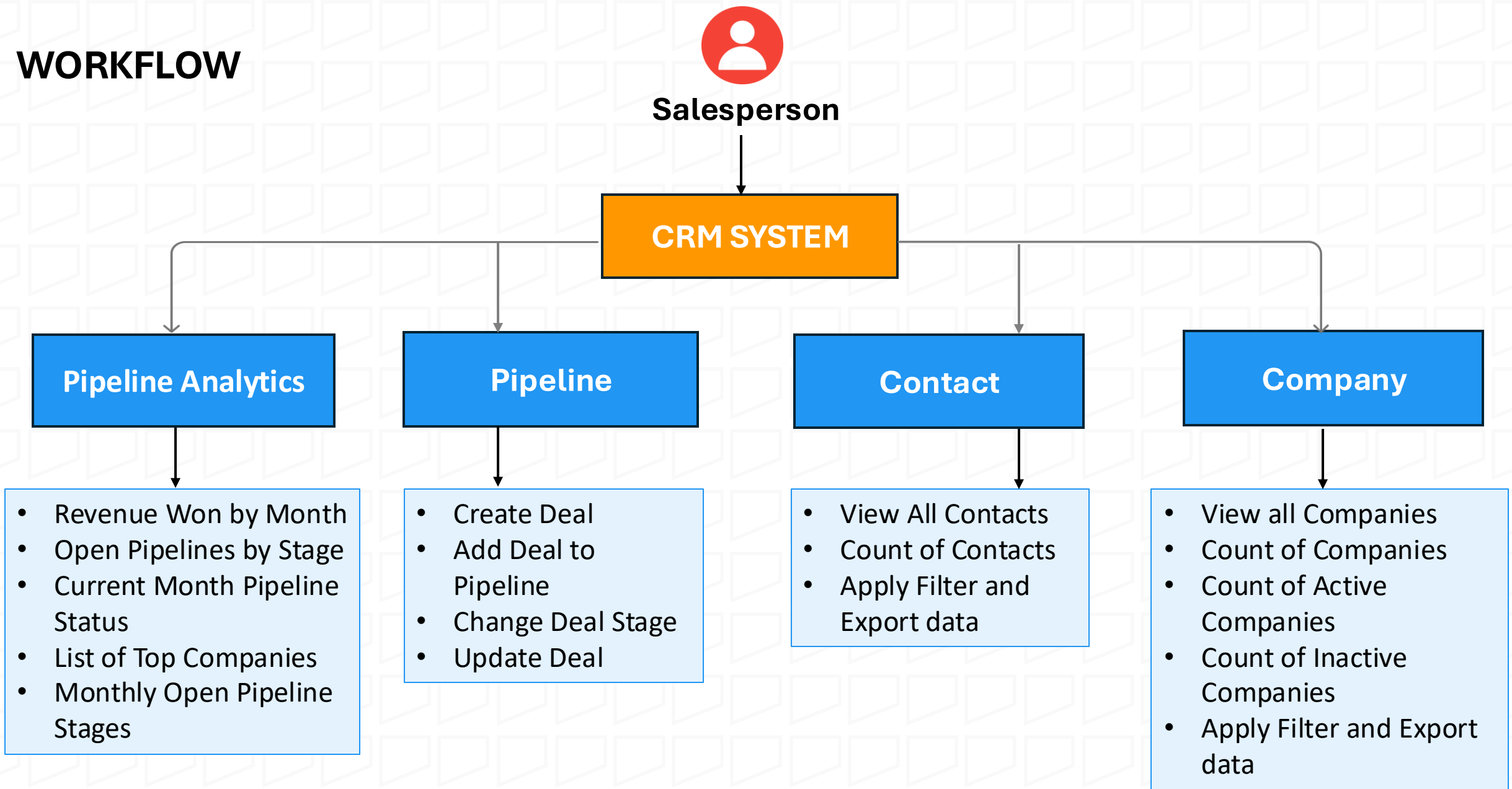
Objective

- 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

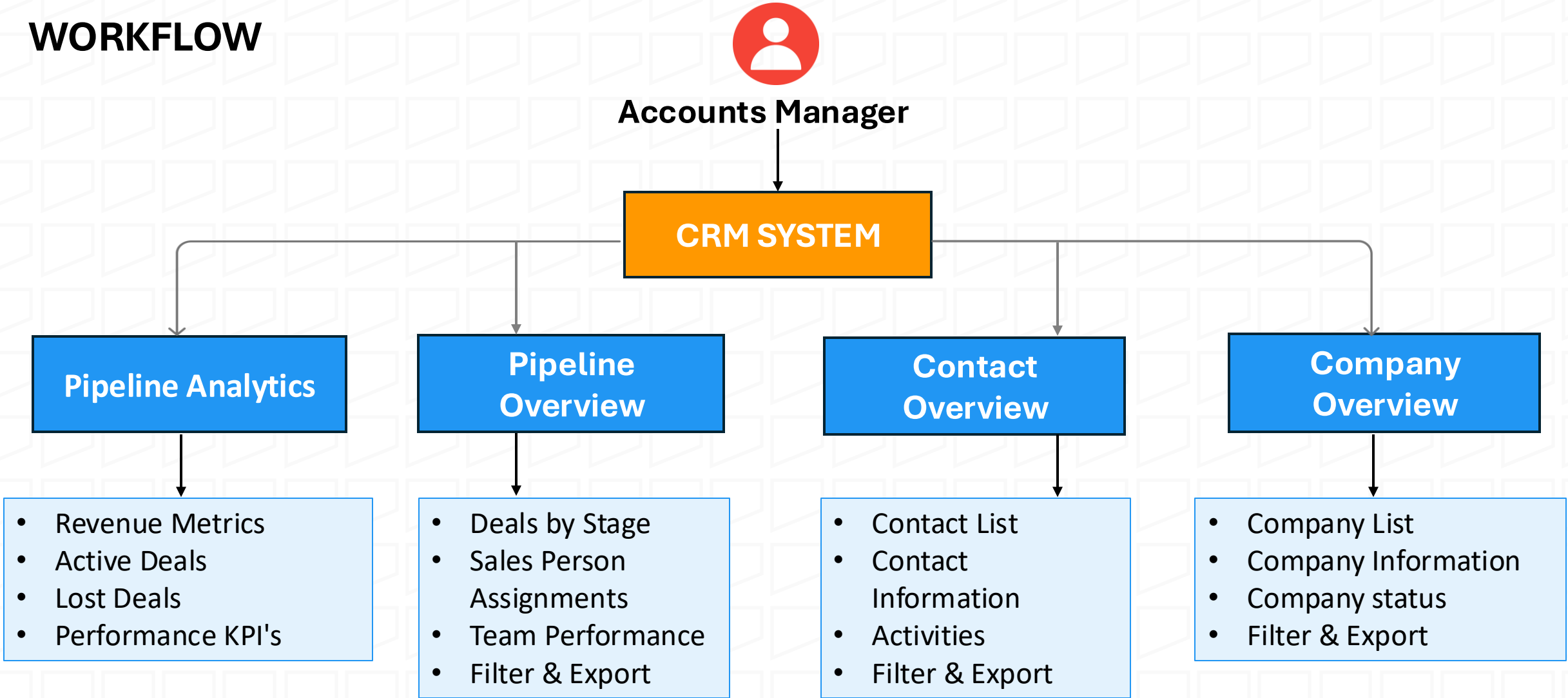
Scope

- 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



WORKFLOW



User Roles and Functionalities

Salesperson

Privileges:

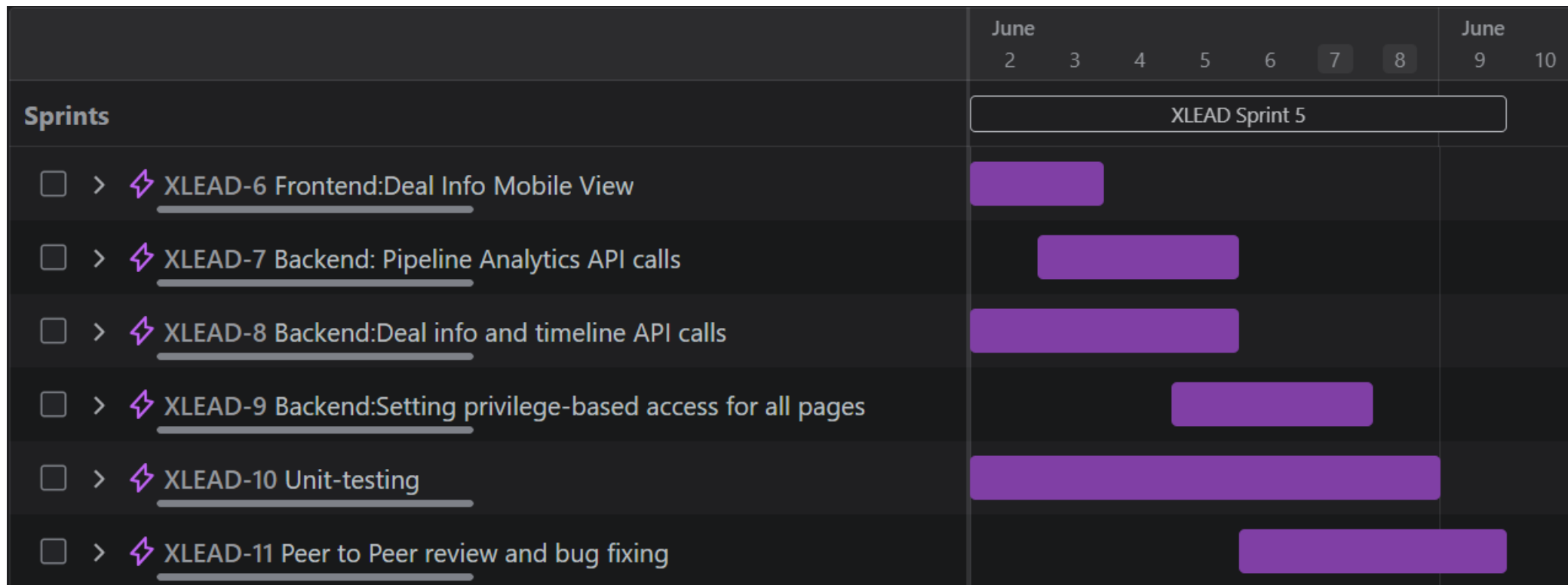
- View dashboard and metrics based on deals under them.
- View, create, update and delete deals in the pipeline stage.
- View, create, update and delete company and contact details for deals assigned to them.
- Export company, contacts and deal information in .csv & .xlsx formats.
- View the history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

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